



The Art of the Ask: Donor Cultivation

**Presented by Rosalyn Merrick, Vice President of Major Gifts
United Way of Metropolitan Atlanta**

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The Art of the Ask: Donor Cultivation

Our conversation today...

The who

What is donor cultivation

What to do

Questions



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Fundraiser forgiveness

“Philanthropy is a potent force for good. Every culture practices it; every culture benefits from it.” –Center on Philanthropy at Indiana University

“He who persuades others to give alms and moves them to act thus, his reward is greater than the reward of him who gives the alm himself.” – Maimonides

“Giving is not a spontaneous act. People, corporations and foundations donate funds largely because they are asked to do so.” –Reynold Levy, *Yours for the Asking*

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The who (according to the *Georgia Gives 2008* Report...)

- Individuals contributed an estimated \$5.58 billion.
- Just over 77.5 percent of Georgia households gave to charity in 2007.
- According to the survey, 68.7 percent of Georgia residents felt that “those with more should help those with less” as a major motivation.
- Nearly 80.2 percent of all Georgia donors agreed they would give more to charity if more funding went directly to programming rather than being spent on fundraising or administration.
- Over half (58.4 percent) of Georgia residents reported that they have stopped giving to a particular charity because they stopped their involvement with the organization.

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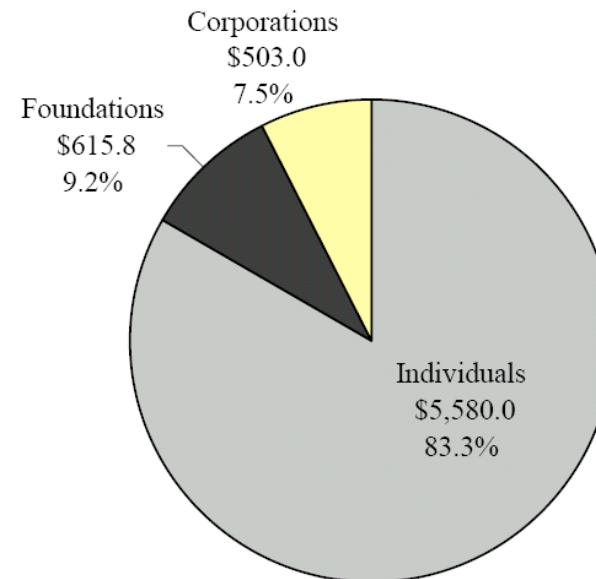
The who (according to the *Georgia Gives 2008 Report...*)

- Georgia households, foundations, and corporations gave an estimated total of \$6.698 billion to nonprofits in the U.S. in 2007.

- Living individuals contributed 83.3 percent of this total and gave an estimated \$5.58 billion in 2007.

- Georgia donors gave, on average, \$2,381, compared with an estimated U.S. average of \$2,247.

2007 Contributions: \$6.698 billion by Source of Contributions for Georgia
(in millions)



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The who (according to you...)

- Determine your potential donor list - look for any and all connections to your work/clinic

- Doctors, doctors' spouses
- Volunteers
- Staff
- Clients/patients
- Members of the community you serve

- Prioritize the people on the list with whom you need to build/deepen your relationship most urgently



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What is Donor Cultivation?

The long-term process of nurturing donors towards higher levels of understanding, commitment and giving.

Cultivation is what makes solicitation possible. Done well, cultivation sets the stage for easy and successful "asks."

Cultivation covers all the communication and contact you have with prospective donors (e.g. meetings, notes, newsletters, special events).

Cultivation is not haphazard...but carefully planned and strategic.



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What is Donor Cultivation – key elements

Fun, engaging, purposeful

Strategic and directed

Well documented, shared with others

Focused on the prospective donor and their needs



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What to do – get to know your prospective donors well (ask and listen)

- What are they passionate about?
- What motivates them to get involved with and/or support an organization?
- To what or who are they most connected to within your work/clinic?
- What is their capacity, inclination, interest and readiness to make a gift?
- Who within their circle of family and friends do they consult about giving?



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Why do you want to get to know your prospective donors well?

It helps you develop a level of comfort and ease in interaction with the prospective donor

You will discover and understand their motivations for giving of their time and treasure

Ultimately, it helps you build your credibility with the donor and will make your solicitation easier and more effective

And for the donor...

They develop a deeper relationship with the organization and with you as their advocate

They have access to information and experiences that will help inform their decision to give

They get to support something that they really care about

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What to do – square one basics

BEGIN WITH THE END IN MIND: increase the prospective donor's interest; solicit a GIFT.

Work backwards from where you want to end up – think about the steps you can take along the way to reach the goal.

Sometimes the first step can be the most difficult. Be creative in thinking about what could open a door to a new relationship.

Consider how you will measure your success along the way and what roads might lead you there.

Be flexible, be creative and be prepared to rethink your strategy along the way!



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What to do – stage the cultivation opportunities

Conversations at events and gatherings

Invite them to targeted events with other prospective donors

Individual visits with the prospective donor and their family when appropriate

Invite them to your clinic

Use volunteers and your advocates to engage them whenever possible

Maintain regular personalized, non-eyeball contact (phone calls, notes)

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What to do – prepare for the ask, then ask

BE HONEST. Start the cultivation process by letting the prospective donor know you would like to see them support your clinic as they develop a stronger relationship and understanding of how their support can make an impact.

PAY ATTENTION. They might send signals that they are not ready to make a gift right now. Remember, your role is to try to move them forward past their objections.

ASK the simple question, “Is now the right time for you to make a gift or consider a proposal?” If yes, promptly follow-up with a proposal. If no, reassess and revise your strategy.



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What to do after “yes” – stewardship

Stewardship is the antidote for buyer’s remorse

Say thank you. Say thank you often!

Inform the donor of your clinic’s success and progress.

Find innovative ways to continue to tie the donor to your work.

Provide opportunities for them to help and stay involved.

Ask your donors for their continued support.

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QUESTIONS...

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Please contact me any time!

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Thank you!