



# MAJOR AND PLANNED GIFTS FUNDRAISING: CULTIVATE CULTIVATE CULTIVATE...ASK



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# MAJOR & PLANNED GIFTS: CULTIVATE CULTIVATE CULTIVATE

## AGENDA

1. **Welcome, Introductions**
2. **Keys to Major & Planned Gifts**
3. **Board Roles**  
Ambassador to Steward Continuum



4. **The Conversations**  
Psychology of Giving: Who Gives & Why? 7 Faces Profiles  
Relational, not Transactional  
Talking Points: Cultivation Meetings & Solicitation/Ask

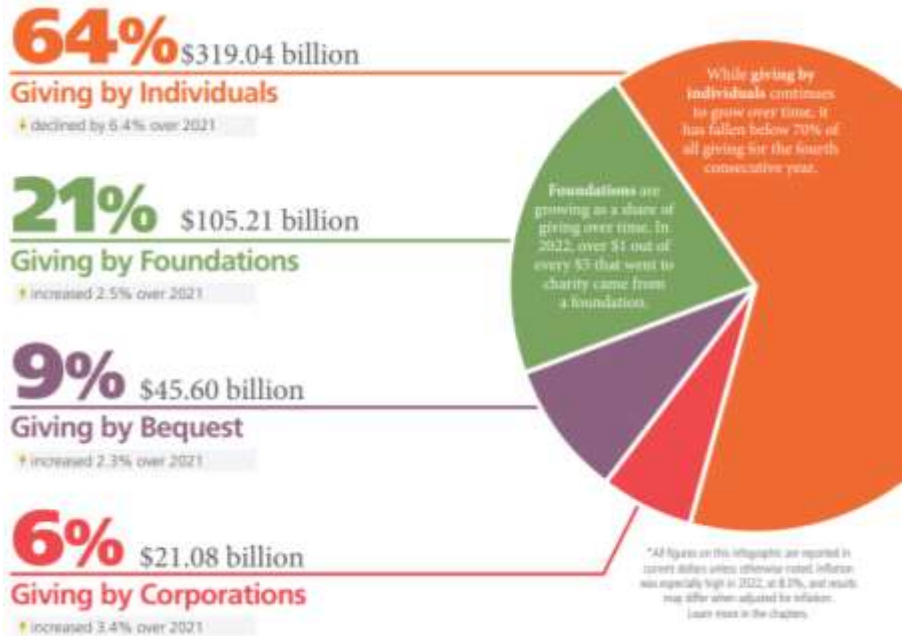
5. **Keys to Success**



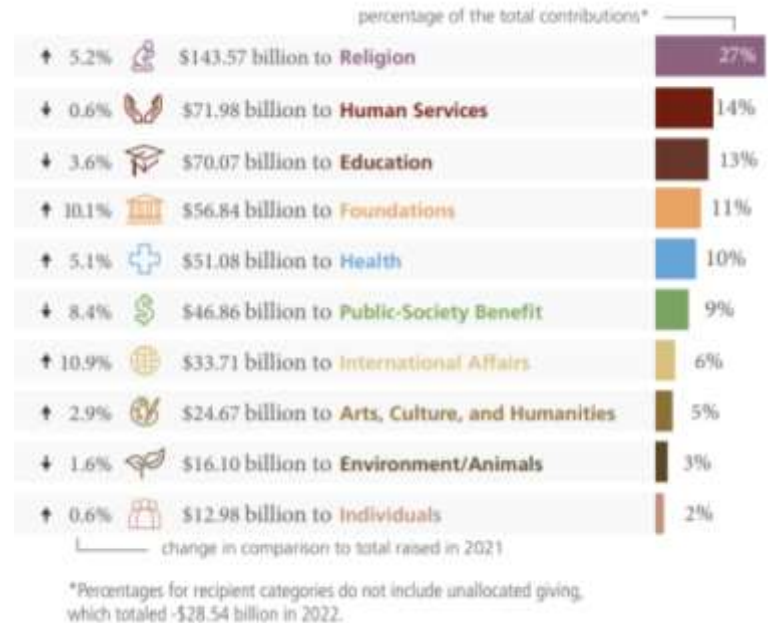
# WHERE DO DONATIONS COME FROM? WHERE DO THEY GO?



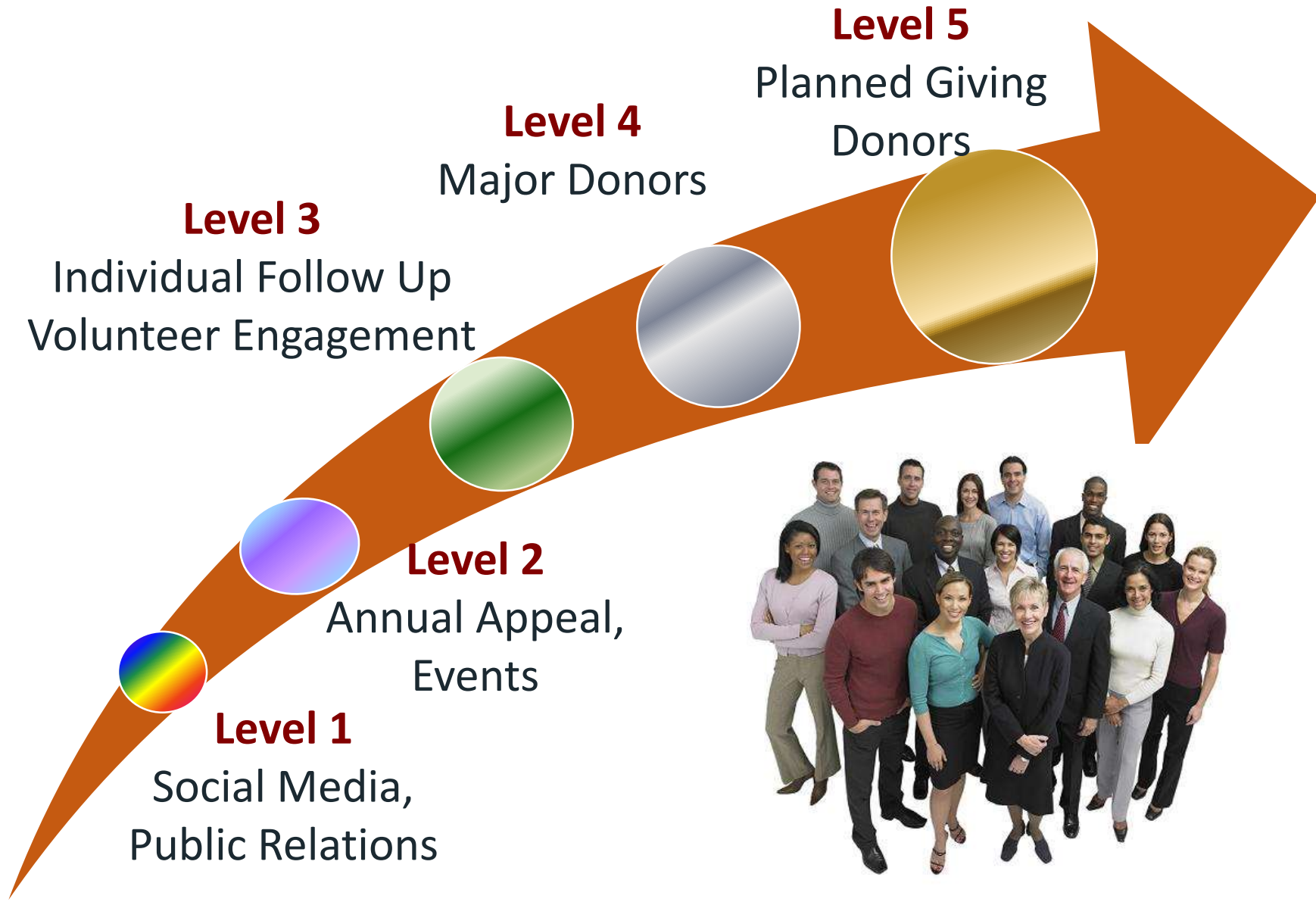
## Where did the Generosity Come From?



## Where did the Charitable Dollars Go?



# OPENING THE DOOR



# KEYS TO MAJOR & PLANNED GIFTS



- To raise higher levels of resources, nonprofits must focus on **major & planned gifts**
- Require **low-key, long-term** care & tending
- Require **face-to-face cultivation & solicitation**
- Board members & volunteers are **key intermediaries** to reach & engage donors
- Major gifts are raised by **peer-level solicitors**
- The **authenticity of the relationship** is crucial: major and planned givers are relational, not transactional



# Why Do Some Nonprofits “Never Get Around to” Planned Giving?

- **Planned giving terminology can be mysterious**  
*lots of long words, legal terms, acronyms, lingo*  
*ie: bequest, donation under will, beneficiary designations (IRAs, DAFs, insurance)*
- **Planned giving can be complex and requires professional advisors**  
*estate planning attorney, tax accountant, wealth/investment advisor, philanthropy advisor*
- **Gift planning is incredibly personal** —requires a client/donor to weigh and prioritize their core values, providing for family & friends, community involvement, tax issues, legacy
- **Planned gifts tend to ‘come to fruition’ after people die**
- **Planned gifts have a long lead time—3-20 years average—and the nonprofit usually doesn’t know for sure until the donor passes**



The reports of my death are greatly exaggerated.





## RELATIONSHIP + MISSION + IMPACT

People give to **people**

+

People give to **causes** they believe in

+

Most major and planned givers tend to look closely  
at organizational **leadership & outcomes**

# BOARD MAJOR & PLANNED GIFT FUNDRAISING ROLES: AMBASSADOR TO STEWARD CONTINUUM

- **Major & planned gift solicitors are made, not born, to the role.** For most people, asking other people to part with their money is difficult at best. Practice helps. Passion is key.
- Developing and sustaining major and planned gift donors is a circular process that is **ongoing & regenerating**.
- The majority of the nonprofit-donor relationship has **nothing** to do with actually asking for money.
- Here are 6 ways that Board Members help develop enthusiastic donors for nonprofits:

## #1-BE A DONOR

Make your own **stretch gift**.

Confirm your own commitment & confidently convey words of commitment to others.



## #2-BE AN AMBASSADOR

Ambassadors **naturally talk about our nonprofit** wherever they go. To be a good ambassador:

- Understand and overcome your own roadblocks to talking about our nonprofit.
- Think of past opportunities you have had to talk about our nonprofit.
- Observe good ambassadors in action.
- Identify situations where you can share your personal feelings about our cause.
- Select potential donors to talk with about our nonprofit.
- Practice! Practice! Practice! Talk about our nonprofit...
  - at home
  - at work
  - with close friends
  - with strangers





# BOARD FUNDRAISING ROLES: AMBASSADOR TO STEWARD CONTINUUM

## #3-BE A SLEUTH



A sleuth is always looking for potential donors to the nonprofit.

**ACTIVE** sleuths find out, when talking with another person, if they are open to the possibility of learning more about our nonprofit.

**QUIET** sleuths explore, through third party means, viable prospects for our nonprofit.

To be a good Sleuth:

- Know what kinds of people our nonprofit aims to **develop partnerships** with.
- **Test** if someone is given to philanthropy by recounting a personally fulfilling experience with our nonprofit, as a lead in to evoking a parallel feeling from the prospect about a nonprofit of their choice. Establish common ground about the satisfaction of participating as a volunteer.
- Tell the prospect that you would like to put their name on our **nonprofit's mailing list**. Ask if they would like to come **visit our nonprofit** at some point.
- Ask people who know our nonprofit to **suggest other individuals** who might be interested in us.
- **Look for leads** in the press, social media, and other nonprofits' materials.

# BOARD FUNDRAISING ROLES: AMBASSADOR TO STEWARD CONTINUUM

## #4-BE A CULTIVATOR



A cultivator actively participates in **structured activities** that are part of our nonprofit's organized fundraising process.

Cultivation is **pre-planned & carried out explicitly over time, as a precursor to soliciting the prospect.**

It is important to plan the process with volunteer & staff leadership.

Cultivators should have:

- a list of ways **to involve the prospect** (tours, receptions, 1:1 meetings, volunteer opportunities)
- **materials** (fact sheet, annual report, event fliers)
- a **confidential prospect profile**
- **coaching sessions**, including how to communicate about major and planned gifts

## #5-BE A SOLICITOR

Solicitors **ask a prospect, face-to-face, for a gift.**

Practice helps.



## #6-BE A STEWARD



Stewards make sure that **care goes into sustaining and growing** partnerships with our nonprofit's donors after receipt of a gift.

This includes: follow up site visits; review of strategic plans & annual reports; formal & informal question/answer sessions.

# THE PSYCHOLOGY OF GIVING: DONOR MOTIVATION

## 7 FACES OF PHILANTHROPY

### Where Do You See Your Own Face? Your Donors' Faces?

#### **The Communitarian**

##### **Doing Good Makes Sense**

*If I'm going to help someone, it's sure going to be my neighbors. We've got to stick together and make life for everyone here in the community just a little bit better.*

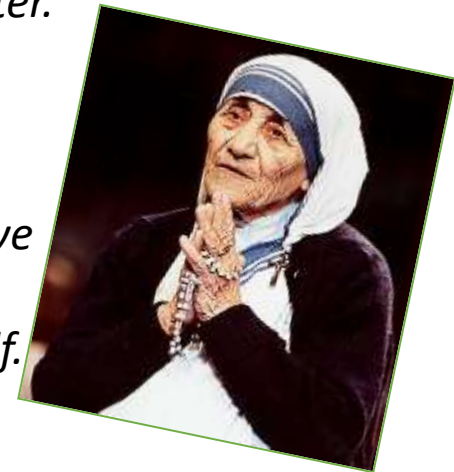


Researchers: Russ A. Prince and Karen M. Filo

#### **The Devout**

##### **Doing Good is God's Will**

*Thanks to the Almighty, I have the means to improve the lives of others. I believe God intends for me to help the deserving, those less fortunate than myself.*



#### **The Investor**

##### **Doing Good is Good Business**

*Giving only makes sense when everyone comes out winning. If I don't consider the financial repercussions of giving, my charitable relationships will not be very strong for very long.*



# THE PSYCHOLOGY OF GIVING: DONOR MOTIVATION

## 7 FACES OF PHILANTHROPY

Where Do You See Your Own Face? Your Donors' Faces?

### **The Socialite**

#### **Doing Good is Fun**

*We all get together, my friends and I, to raise money for charity. When one of us decides to help a charity, that charity gets all of us. It's a group effort.*

### **The Repayer**

#### **Doing Good in Return**

*I am very successful, but never into giving to charity before. After I found out someone in my family had received services from your organization, I began to make gifts to help other people like my family was helped.*

### **The Altruist**

#### **Doing Good Feels Right**

*For me to continue to grow as a compassionate person requires that I care. Philanthropy is a process of personal development and a way to move things forward.*

### **The Dynast**

#### **Doing Good is a Family Tradition**

*Charity was always what my family did. We just all grew up with discussions about it, with going to charity affairs, with people interested in community issues.*



# CULTIVATION CONVERSATIONS: HELP YOUR DONORS UNDERSTAND WHY THEY GIVE

- **Family:** Honoring and appreciating ancestors, setting an example for living family members
- **Faith:** Giving due to spiritual beliefs and/or religious practice
- **Legacy:** Giving to influence the future and to be remembered
- **Experience:** Inspiration comes from an individual's own life
- **Analysis:** Donors objectively identify areas of greatest need and develop a method to accomplish goals





# CULTIVATION CONVERSATIONS: SHIFT FROM TRANSACTIONAL TO RELATIONAL CONVERSATIONS

- Where were you **raised**? What **values** did your parents strive to instill in you and your siblings?
- These days, what is **most important to you** and your family?
- How did you choose your **profession**/decide your line of business?
- To what do you **attribute your success** in life? Who inspired you?
- What is **most important to you** in life?
- What **causes do you care about most**? Why?
- How do you **involve** your family/neighbors/friends in causes you care about? How do you pass along your values to others?
- What is the most **meaningful gift** you have made?
- What do you want your **legacy** to be?  
How do you want to be **remembered**?  
What are your **proudest accomplishments**?

THE **BIG** QUESTIONS  
THE **BIG** QUESTIONS



## BEFORE THE ASK:

# CLARIFY THE CASE FOR DONATING A MAJOR & PLANNED GIFT

1. What's the **need** to be met?

*... clear understanding of what the donor is being asked to support*

2. Why is it **important** to the world?

*... strong & moving case for support*

3. **How** is our nonprofit going to meet the need?

*...solid plan for meeting goals*

4. How much will it **cost**?

*...cost/benefit, amongst other priorities*

5. **Who else** is involved?

*...evidence of other support ... sense of leadership*

6. What do you need from **me, the donor**?

*...how do I fit in?*

7. What's **in it for me, the donor**?

*...avenues for meaningful involvement, participation, recognition/anonymity as desired*

8. **How will we know** when we've accomplished what we aim to do?

*...sense of impact*



Offer donors a buffet of options  
They select what's right for them

# CULTIVATION MEETINGS

1. Summarize our nonprofit's **mission, vision & key initiatives**
2. Ask the prospect what **their interests** in this area are
3. Provide a **personal experience** or value that conveys why our nonprofit is of great personal meaning to you
4. Ask the prospect to **recount a similar feeling** they've had
5. Relate the **prospect's interests to our nonprofit's initiatives**
6. Summarize **3 recent accomplishments & 3 key assets** of our nonprofit
7. Leave with a next step that deepens the relationship between the person and our nonprofit...  
**"Just one follow-up thing to do..."**



# THE ART OF 'THE ASK': DONOR-CENTRIC

## PUT YOURSELF IN YOUR DONOR'S SEAT. WHAT IS BEST FOR THEM?

- **Time:** What makes you believe your donor is ready to be asked for a gift now?
- **Place:** Where will your asking conversation take place? What's best for the donor?
- **People:** What 1 or 2 people make the best team to talk with the donor & ask for a gift?
- **Case:** Lead prospects → their own interests & values. Help them talk about their **motivators**  
**Listen.** Feed back their ideas. Refocus your ask. Paint a picture to help envision the impact.  
What might strengthen your case, your vision & your ask?
- **Concerns:** What concerns might need to be addressed? What are your responses?
- **Ask:** "Would you consider a lead gift to our cause?"  
Then be quiet. Let them think & respond.
  - **No/Maybe/Not Yet:** If the donor is not ready to give, ask them to set their conditions for saying yes.  
Time? Information? Organizational involvement? Another meeting?
  - **Yes:** If the donor agrees to make a commitment, demonstrate your unabashed joy  
+ provide them with donation instructions
    - pledge note to sign
    - pre-addressed, pre-stamped envelope to mail check
    - online URL for credit card donations
    - stock transfer instructions

Heart logic and mind logic are often two very different things.



It has to feel right and make sense to move forward with ease.

If it doesn't feel right, but it seems to make sense, pause, and investigate within.

If it feels right but doesn't make total sense, ask the mind to trust the heart a little more.

The heart's usually the wiser of the two.

-Doe Zantamata

# KEYS TO SUCCESSFUL MAJOR & PLANNED GIVING



## 1. COMPELLING PURPOSE

- Strong, moving **case for support** that addresses personal needs & interests
- Specific **goals**: clear understanding of what the donor is being asked to support
- Solid **plan** for meeting goals & completing the defined work
- Evidence that the gift will have meaningful **impact**

## 2. MEANINGFUL CULTIVATION & RELATIONSHIP

- Strong **leadership** (board, staff, volunteers)
- Methods to **promote engagement** & ownership
- Understand donor's **motivations** & frames of reference
- Cultivation & solicitation & by people who have **already given** & are asking others to do the same
- Evidence of **other support**
- Opportunities for **recognition**, if desired
- Avenues for involvement & **meaningful participation**

