



# Part I: Understanding the Donor Lifecycle

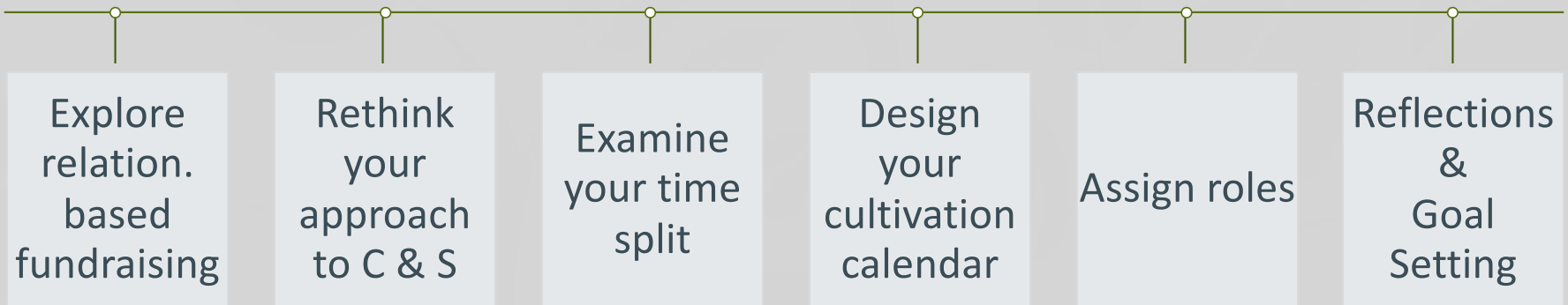
## Part II: Asking Made Easy

The Prizmah National Conference: Dare to Dream

Tuesday, March 12, 2019: 10:30 am - 11:45 am and 12:15 pm – 1:30 pm

Amy Schiffman, Giving Tree Associates

# Session Goals





# Relationship-Based (vs. Transactional) Fundraising

Finding people who believe in what we do and engaging them in our efforts to strengthen our schools

# The Life Cycle of a Donor



# Major Gift Prospects

## Where are they?

01

Mine the networks of faculty, board & committee members.

Start by asking the:

- Board
- Major donors
- Long time donors
- Consecutive donors
- Active parents/alumni/GP's

02

- Establish a database of caring, capable individuals from your CRM and suggestions from leadership.
- Research the list and develop cultivation plans.

# What should we know?

**Relation-  
ships  
within the  
org.**

**Personal  
interests**

**Volunteer  
roles**

**Communal  
giving**

**Connection  
to the  
community**

**Connection  
to the  
school**

**Business  
interests**

**Giving  
history  
annual/  
capital**

**Family  
history**

# Major Gift Prospects

## KEY DONOR QUALITIES

**A**

**Ability to make  
a meaningful  
gift**

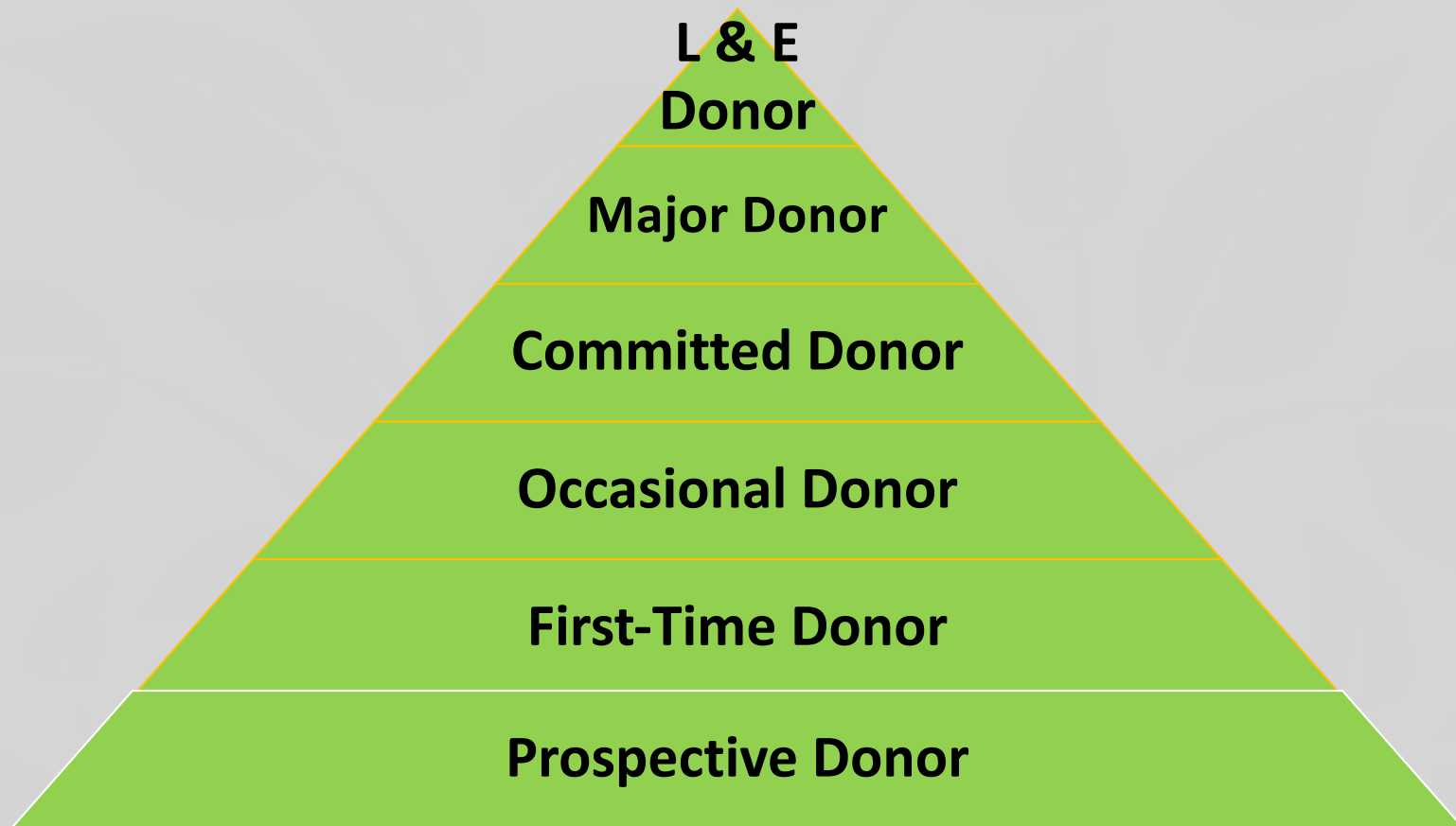
**B**

**Belief in the  
mission**

**C**

**Connection  
within the  
school**

# Donor Engagement Pyramid







The Secret

## **Link the donor's philanthropic interests to the school's needs**

(you cannot do this effectively  
without building a relationship)

# Definitions

## SOLICITATION

is a **once a year**,  
one-step, one-ask,  
one-dimensional contact.

## CULTIVATION

is a **year round**,  
gradual, open-ended,  
multi-dimensional process.

## Create A Cultivation/Solicitation Strategy

- **Cultivate** – prospects...How will you educate and engage around giving? Who will serve as relationship manager? What must I learn about this person/family before I ask? Be intentional, create a plan.
- **Ask** – When will you ask? For what will you ask? Who will ask? How does my research (and what I know about the donor) impact my ask?
- **Steward** – Define the necessary “touches” with this donor, to occur (before and) after the ask is made.



## Moves Management

A series of contacts over time that aim to move the prospect from **awareness** to **commitment**.

# Moves Management: Moves You Can Use

## (E)MAIL

*with a personal note:*

- Articles
- Video
- Photos
- Annual report
- Books
- Newsletters
- Resources
- Holiday cards

## MEET

- HOS/Board President
- Principal/ Dept. Chairs
- Students/Alumni
- Key donors
- Board members
- Committee leadership

## INVITE

*them to join you for:*

- Shabbat dinner or lunch
- Lectures and/or cultural events
- Golf or tennis
- School event/performance
- Donor recognition events

## EXPERIENCE

- Tour the school
- Shabbaton
- Committee/board meeting
- Annual meeting/graduation
- Tikkun olam event
- Class or program

# The Case for Stewardship

*What is the  
Return on  
investment?*

*What is the  
Risk of not  
doing it?*

*What is the  
Cost*



People will support the organization that  
loves them the most.



# Stewardship Segmentation

**1** All Donors

**2** Major Donors

**3** Leadership

**4** Address objections



# Stewardship Segmentation

## Market One – All Donors

- Non-negotiable; everyone gets it
- Gift acknowledgements
- Newsletters, annual reports
- Special events
- Personal letters (within 72 hours) and phone calls
- Low cost – high efficiency
- Constant and professional

## Market Two – Major Donors

- Donor recognition circles and events
  - ED/Rabbi/HOS/BP access
- Naming opportunities
- Leadership development & training
- Personal visits; site visits
- “Opportunity” to serve as a solicitor
- Customized, visible, investment of time
- Engage in cultivating others

# Stewardship Segmentation

## Market Three – Leadership

- HOS/BP/DoD/ED access
- Breaking news
- Inner circle
- Board meetings as tools to educate and inspire the board

## Market Four – Mega Donors

- Individualized plans
- Sophisticated recognition
- Deep involvement with ED/HOS/ DOD/ BP, etc.

# The Stewardship Calendar: by Giving Level

ANNUAL GIVING LEVEL	Thank in Quarterly Newsletter & Dinner Program	Special Recognition in Annual Report /on Website	Personalized End-of-Year Card with Student Artwork	Inclusion on Donor Wall	Group Donor Recognition Event	Chai Society Ceremony	VIP Reception at Annual Dinner	ED/Rabbi/HOS Roundtable/ Coffee
\$50,000+	✓	✓	✓	✓	✓	✓	✓	✓
\$25,000 - \$49,999	✓	✓	✓	✓	✓	✓	✓	✓
\$18,000-\$24,999	✓	✓	✓	✓	✓	✓	✓	
\$10,000 - \$17,999	✓	✓	✓	✓	✓			
\$5,000 - 9,999	✓	✓	✓					
\$2,500 - \$4,999	✓	✓						
\$1,800 - \$2,499	✓							

# The Stewardship Calendar: by Individual

Top Donors and Prospects	Rosh Gift	Email	Invite to Fall Event	Lunch	Solicitation	Classroom Event	Pesach Gift	Graduation Invite
Schiffmans	✓	✓	✓	✓	✓	✓	✓	✓
Londons	✓	✓	✓	✓	✓	✓	✓	✓
Goldbergs	✓	✓	✓	✓	✓	✓	✓	
Stratfords	✓	✓	✓	✓	✓			
Millers	✓	✓	✓					
Schwartz	✓	✓						
Weil	✓							

צשנה טובה



*L'Shanah Tovah!*

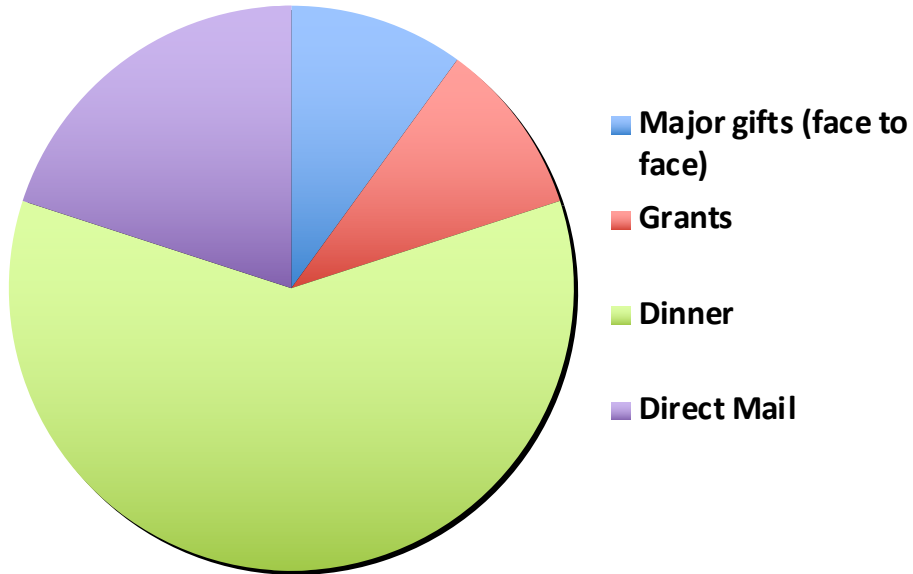
People will support the organization that loves them the most.

Campaign Development:  
**Where should  
the hours go?**

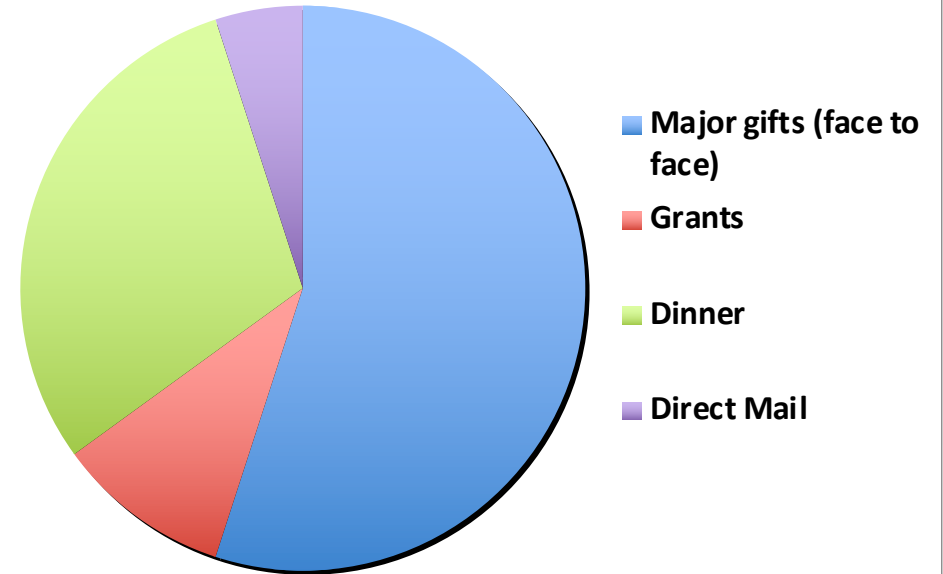


# How We Divide It Up

## My Time



## Dollars (as a % of campaign revenue)



# Building a Stewardship Team

- **Who's on your team?**
  - **DoD, HOS, BP, DCC**
  - **Development Committee**
  - **Board Members**
  - **Key staff/faculty**
  - **Everyone's portfolio, but you need an "A" Team...**
- **Internal vs. external team?**



## How to stay focused on the big picture:

- ✓ Strategic campaign planning
- ✓ Schedule time each week on your calendar
- ✓ Set manageable goals (2-3 meetings/month)
- ✓ Utilize your board and development committee
- ✓ Teach your board how to steward



Rachel Roth



Exercise:  
Creating Your Plan



# Thank you!

Contact me: **Amy Schiffman**

[amy@givingtreeassociates.com](mailto:amy@givingtreeassociates.com) | 847.942.6071

[www.givingtreeassociates.com](http://www.givingtreeassociates.com)



# Powerful storytelling: Asking made easy

The Prizmah National Conference 2019: Dare to Dream

Tuesday, March 12, 2019: 12:15 pm – 1:30 pm

Amy Schiffman, Giving Tree Associates

A woman with long dark hair, wearing a patterned dress, is sitting and writing in a notebook. She is smiling slightly and looking to her right. The background is a textured wall with a diamond pattern.

## Session Goals

**Explore** the intersection between asking and storytelling

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**Define** the road to the ask; examine motivations for giving

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**Overcome** discomforts around asking

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**Master** the ask; practice telling your story

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**Prepare** for objections and follow up

## Exercise: Knowing Your School / Telling Your Story

- **Describe** your school in one sentence.
- **List** three ways the school enriches people's lives.
- **Express** your vision for the school's future.
- **Tell** a story. If you were asked to describe the essence of your school in one story, what would it be?



# Naming Our Discomforts: Greatest Fears in Fundraising



## Greatest Fears in Fundraising

- Failure/Rejection
- Abusing the relationship
- Asking for a favor
- Lack of knowledge
- Asking for too much
- Public speaking
- Weak case
- Not meeting your goals



# Why do people give?

- They've been asked
- Belief in the mission or project
- Public recognition/  
desire to be immortalized
- Memorialize others
- Involved as volunteer
- Take advantage of tax benefits
- Respect the solicitor or owe a favor
- Sense of communal responsibility
- Desire to leave a lasting legacy
- Emotional reward from making a gift

# Why don't people give?

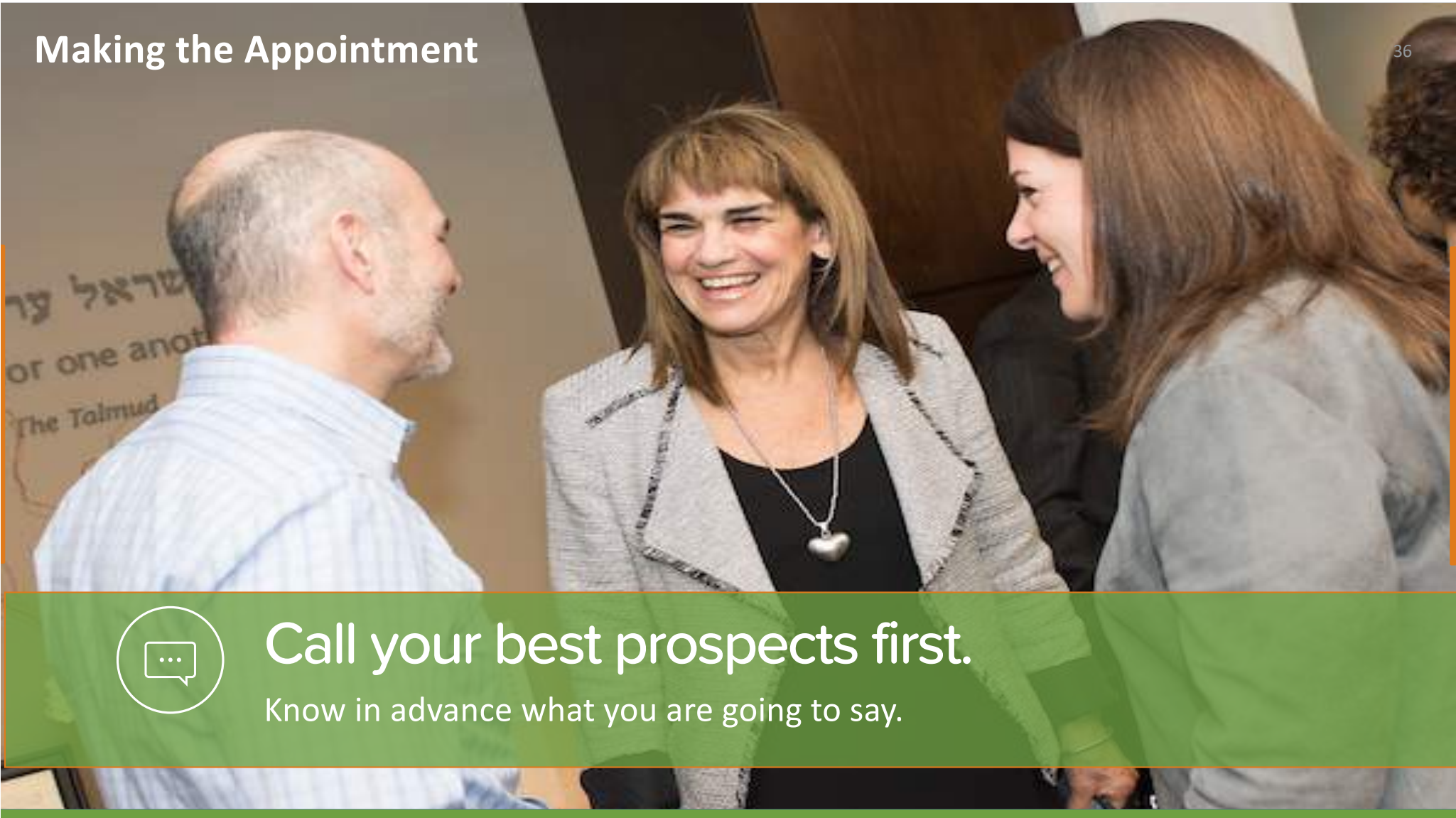
- The wrong person asked
- The case wasn't strong enough
- Wrong mission
- The appeal wasn't personal – didn't do the homework
- No one explained giving options
- The timing was off



WHY THE FACE TO FACE  
ASK?

## Making the Appointment

36



**Call your best prospects first.**

Know in advance what you are going to say.



## Establish rapport.

Be in an upbeat committed mood. Don't be apologetic.



**Create interest.**  
Ask for an appointment.



ASKING FOR THE GIFT

# Phase 1: The Opening

1

**Build rapport/re-establish your relationship**

2

**State the purpose of your visit**

3

**Discuss your involvement with the school**

4

**Be enthusiastic**



## Phase 2: The Involvement

### Tell the story of the campaign...

01

Present the purpose of the campaign – describe the case for giving and why it is important

02

Talk about your own commitment to the school's mission and making this campaign successful; tell your story

## Phase 3: The Discussion

Ask the prospect about his/her reactions, feedback, questions

**1** Listen carefully

**3** Address objections

**2** Answer questions

**4** Invite reactions...

## Phase 4: The Ask and Closing

1

Summarize the discussion

3

Get a commitment or plan for follow up

2

Ask for a gift

4

THANK

Remember to use a “consider” statement; and no talking after the ask!



**Common  
Objections**



I give generously to other Jewish communal agencies/all of my \$ are already committed.



I already know all about the school – you don't need to make a trip to tell me about it.



I don't like \_\_\_\_\_ about the school, so  
count me out.

I already write you a big check for tuition.  
Isn't that enough?





# After the Visit

- Thank you  
(personal note, formal note)
- Make a plan to follow up as necessary
- Report to staff on the visit...plan a relationship building move
- Extend the relationship to others as appropriate





# Thank you!

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