Donor Qualification

The What
The Why
The How

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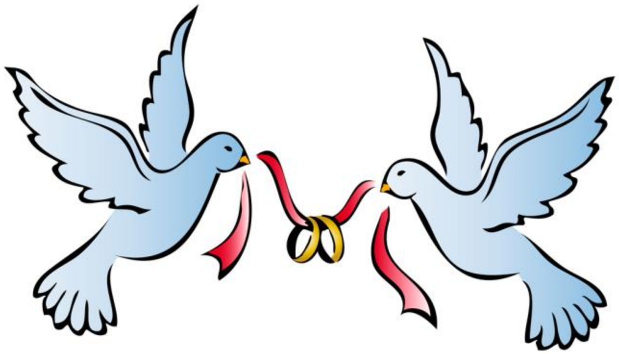
According to Merriam Webster Dictionary, a *relationship* is defined as: the way two or people or things are connected.

In most human romantic relationships there is a general progression of events:

initial meeting
the courtship
a period of engagement
and the commitment

According to research conducted by Brides Magazine, the average length of an engagement period is 12-18 months.



These marriage relationship statistics make sense, they are easy to understand.

If you take time to understand, analyze, and reflect upon your relationship you will most likely have a deeper, more committed, and realistic expectations of your partner.

But what does this have to do with Fundraising?

I thought this session was about Donor Qualification?

Fundraising is 100% about Relationships

The donor's relationship with your organization

Your relationship with your donor

And the marriage of the two

Just like as in a marriage, to have the most committed, solid, and lasting relationship you must make the best pairing.

You can only do this trough

Qualifying your Donors.

A Qualified Donor is an eligible individual or institution that ***CAN*** and ***WILL*** make a donation to your organization.

Most organizations, especially smaller non-profits do not have the time to waste talking to the wrong people.

You must use your time wisely to talk to the
right people,
at the right time,
with the right topic.

The only way to determine these “Rights” is to investigate through analyzation, information seeking, and **donor qualification calls**.

Making a qualification call is one of the most challenging tasks fundraisers will undertake, therefore many fundraisers avoid doing so altogether.

According to a 2013 poll conducted by the AFP (Association of Fundraising Professionals), making a qualification call causes more apprehension (25%) than making the actual donation ask (18%).

Start with your top donors that have given a gift within the last 18 months. If you have no gift data, start with your volunteers or committed partners.

Gather preliminary information.

There are many paid background gathering screenings that organizations can employ to gain information.

These services can provide great information that can be used as tools in building your donor's portfolio. However they can be costly and they can provide incomplete information.

You can be just as successful gathering information for free on your own. Using Google, social media sites, real estate finders, etc.. You can almost always find pertinent information.

Google Search

Zillow

Facebook

Some things you can discover on your own:

- Full Name
- Spouse name (possibly children)
- Address (with this, you can determine approx. value of home)
- Phone Number
- Higher Education information
- Job Title or place of employment
- Membership or volunteer association

You should apply the **LAI Principle** to every prospect donor

Linkage-How is the donor linked to your organization

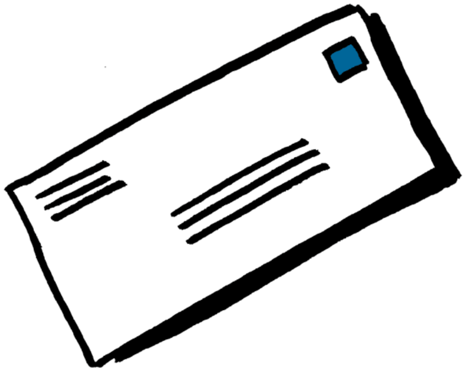
Ability- Does the prospect have the ability to financially give

Interest- Does the prospect have a firm understanding of the organization's mission and seek to further this

These applications should be relevant to your most committed donors or prospects you wish to further cultivate. *Prospects that are committed at all 3 levels should have a high qualification rank and be a priority to your donor portfolio.*

Once you have gathered sufficient information, you must make the decision to move forward with further qualification. This involves making an appointment to meet with them.

In some instances it may be appropriate to send a letter explaining that you will be contacting the donor for an appointment. This is especially important if you or the organization has had limited or no contact with the donor.



December 12, 2017

Dear,

I am writing to you today to share some exciting news about St. Paul Catholic Center. As you might recall, over the last couple of years we have conducted an extensive and professional evaluation of our building to determine the needs of our aging facility. This study, with its many recommendations, helped us decide that it was time to move forward with a building renovation project. This proposed project has been approved by the Archdiocese of Indianapolis and will help commemorate our 50th anniversary on campus in 2019.

At this time, we have established a committee of parishioners that is helping to lead this capital improvement effort. Guided by our campaign co-chairs and long-time parishioners, John and Ruth Simon, and assisted by our professional campaign consultants, Johnson, Grossnickle & Associates of Greenwood, Indiana, we are eager for this project to come to life.

In the coming weeks, you will be contacted by a member of our committee. I would ask that you be open to meeting with the committee member about our renovation endeavor. It is vital to the success of our efforts to be able to speak with engaged and committed parish members like (yourself / yourselves).

Please contact me directly with any questions you might have. I am looking forward to working with you on this project.

In Peace,

Fr. John J. Meany, O.P.
Pastor

Once a letter or email has been sent

YOU MUST FOLLOW UP!

MAKE THE CALL

Surveys results have shown it takes 7 contacts (calls) to reach the mid-level executive.

You must be persistent and you must be prepared to leave a message.

The "BEs" of leaving a voicemail message:

Be prepared- know what you want to say

Be Clear- do not use fancy words or jargon

Be Concise- you must state the purpose of the call within the first 15 seconds

Do not go over 30 seconds for the entire message

Be Compelling- give the prospect a reason to want to call you back

Be welcoming- sound friendly and smile

Be Reachable- give exact numbers they can call you back, speak clearly and repeat number

Be Persistent- vary the calls to once a week at different times

Be prepared for a live person to answer the phone. Nothing throws you off that someone answering a call when you were expecting to leave a message!

When you reach a prospect, do not apologize for taking up their time or bothering them.

You must assume that your organization has something to offer them and they will want to meet with you.

- Introduce yourself, title, and organization
- Explain that you want to share with them the exciting things that are happening with your organization
- You are calling to set up a time when you could meet and further discuss the organization
- Ask advice, solicit help

- When scheduling the qualification appointment, do so on the terms of the prospect
- Meet at a time or location that is convenient to them
- Meeting at their home or office is ideal
- Schedule the meeting to last 30 minutes, unless otherwise requested

You may have prospect come out and ask if you are making the appointment to ask for a gift. A sample answer might be, "*Although my work is to raise funds for XYZ organization, the purpose of my visit is to renew (or establish) contact with each of our partners, learn about your experiences with our organization, and to share wonderful news about our organization".*

Remember you don't propose marriage before your first date.

The Visit

- Approximately 3-5 days before the meeting send a quick email to confirm that you are excited to meet them. (You should have asked for the email address in call if not previously obtained)
- Know the things you may want to ask the prospect
- Be prepared to listen and make notes of EVERYTHING!
- Arrive at the meeting 10-15 min early
- Establish a relaxed tone, bit don't be so casual that you are wasting the donor's time
- Do not bring loads of papers of fliers
- Do bring a business card
- Start with casual small talk, but be prepared to transition conversation quickly
- [If a gift is offered, be prepared to accept it]

Pay attention to everything. From room décor to family pictures.
Remember family names and mentioned activities.

All of these clues help you better understand your prospect and their intentions.

Some questions that can be asked at the visit:

What is the prospects interest in your organization?

Why does the prospect support your organization?

What would the prospect perceive as your organization’s strength or weakness?

What does the prospect feel are the top priorities for financial support?

Would the prospect consider financially supporting these priorities (not an ask)?

Do they have any friends or colleagues that might be interested in learning more about the organization’s mission?

Document these things within the first 8 hours after your visit in “call notes”. Be aware that the donor does have a right to access any information you may have on them in their donor file.

After the visit, where you able to answer these questions:

The prospects relationship with organization

The prospects opinion or assessment of the organization

Indications of financial capacity

Likelihood of become an annual supporter

Likelihood of a major gift

Likelihood of becoming a planned giver

Follow up is vital. This step will move you from qualification to cultivation, which leads to a gift!

Even if you deem the prospect not a high priority, it is important to thank them for their visit and keep them in the “loop”.

With collected information, you should be able to rate or rank prospects. Within this ranking system, it should be evident which prospects should move forward to the cultivation phase of the donor cycle.

Once qualified, a donor should move through an established cultivation plan. This plan should be standard through your organization, but can be tailored to your donor's personal needs or interests.

A carefully crafted cultivation plan will result in engaged individuals that make contributions to your organization!