Moving Donors up the Pyramid for Maximum Results

Presented by:
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Overview of Today

1. Proven Techniques to Upgrade Donors
2. Stewardship and Cultivation
3. Upgrades through Monthly Donor Programs
4. Marketing Planned Gifts
5. Questions and Answers
Today’s Themes

• Segmentation
• Proven Techniques
• Testing
Segmentation: The Donor Pyramid

- Planned Gifts
- Major Donors
- Renewed Donors
- New Donors
- Prospects
- Universe
Part 1: Proven Techniques to Upgrade Donors
Three Approaches to Upgrades

• Segmentation and appropriate packages
• Special Offers
• Clubs and Societies
• In all things test, test, test…

Easiest ($)

Hardest ($$$$$)
The Power of Segmentation for Upgrades

Determine what the natural dividing points are for your main file.
Slightly Different Versions of Packages for Upgrades

Closed Faced, First Class, Personalized letter to $250+, same letter and reply

Renewal 1
Other Personalized Techniques

Full color insert “prepared for” the prospect. Cost effective in small quantities.
Specific Asks: Mini-Proposal

Mini proposal format allows for in-depth program description to support upgraded ask.
Format for Higher Dollar Gifts

Highly personalized, oversized format

Personalized cover sheet
Matching Gifts

Explains the Format

Tear-off reply focuses on match. Ask based on donor's highest previous gift
Naming Opportunities

Letter discussed “legacy” served by inscription

Special opportunity to have name inscribed on a window of the Museum highlighted in brochure
Defined Societies with Benefits

Central Park Conservancy
Conservator’s Program
($1,000 giving threshold)

Invitation focused on the cache of CPC, and included a list of the high profile Trustees
Benefits listed prominently in package

Special Cocktail Party to welcome New Members

Central Park Conservancy

In appreciation of your generosity and commitment, the Board of Trustees of the Central Park Conservancy would like to offer you these special benefits:

- **Belvedere Knight - $1,000**
  - Listing in the Annual Report
  - Invitations to Special Events such as: Halloween Gala, Family Ice Skating Party, Spring Celebration, and "Windows on the Park" Cocktail Party
  - Invitation to a Central Park Tour (for two)

- **Belvedere Knight Tote Bag**
- **Central Park Conservancy Tote Bag**
- **Central Park Conservancy Walking Tour Guide, and Newsletter**

- **Belvedere Grand - $5,000**
  - Belvedere Knight Benefits, plus:
    - One Hour Boat or Bicycle Rental on the lake (for two)
    - Admission to a Central Park Tour (for two)

- **Belvedere Grand - $5,000**
  - Belvedere Knight Benefits, plus:
    - Private Tour of Central Park with Central Park Botanist (for six)
    - Guided, Ride on the Lake (followed by Coffee and Donuts) at the Boathouse (for two)

- **Grand - $10,000**
  - Belvedere Grand Benefits, plus:
    - Private Tour of Central Park with Central Park Botanist (for six)
    - Guided, Bike Tours on the Lake (followed by Coffee and Donuts) at the Boathouse (for two)

R.S.V.P.

The Trustees of the Central Park Conservancy are honored to invite you to become a Conservancy in our ongoing mission to restore, protect, and maintain Central Park.

To celebrate your recent leadership role, we invite you to attend our

**Belvedere Knight Cocktail Party**

**Belvedere Grand Cocktail Party**

Inviting new Conservators

Wednesday, 14th 2009 8:00 - 10:00 P.M.
Part 2: Stewardship and Cultivation
Special Packages to High Value Donors

Dear Mr. Sample,

You have shown how very much you can share our world's most vulnerable people through your generosity and support of Mercy Corps. I am most grateful for your continued commitment to our work.

In this write, I want to thank you for all that you have done.

As you may know, in the last three years, we have had the opportunity to reach out to hundreds of thousands of children and families in need — a truly inspiring period in our history.

I want to thank you for the support you have provided over the years.

I am happy to tell you that the Mercy Corps program is one of the most successful in the world.

Yours for now,

Dan O'Neill

April 18, 2008

Lisa Maska
12206 Hollow Tree Ln
Fairfax, VA 22030-6246
Send Periodic Notes

Alerting the national conscience

UNITED STATES HOLOCAUST MEMORIAL MUSEUM
Conference Calls Bond Donors

Important Announcement for PCRM Stewards, President’s Circle, and Lifetime Partner Members!

I just wanted to remind you about PCRM’s second “Update from Dr. Barnard” conference call, exclusively for PCRM Stewards, President’s Circle, and Lifetime Partner members. Here are the call details again:

- **Date:** Thursday, Aug. 23
- **Time:** 2 p.m. EDT
- **Conference Call Number:** 866-469-3239
- **Conference Call Access Code:** 31829695

We invite you to join the call for an update from PCRM president Neal Barnard on PCRM’s current and upcoming work. There will be a question and answer session.

The feedback from the previous update was enthusiastic. It is gratifying to have so many members engaged in our issues, pose great questions, and offer insightful comments.

SUPPORT PCRM
Donate Now
Join PCRM or Renew Your Membership

CONTACT
Brian Halprin
PCRM Membership Coordinator

RELATED LINKS
Subscribe to future PCRM e-mail communications
Differentiate Packages

Welcome!

3309 Wyndham Cir Apt 3173
Alexandria, VA 22302-4313

3015 SW First Avenue • Portland, OR 97201 • 800.292.3355
Part 3: Monthly Donor Programs
Mercy Corps “Partners In Mercy”

Carrier looks very personal and inviting.

Personal address label with letter signer’s name used.
Reply Form Should Be Easy to Use

Giving options are made simple.

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Partners in Mercy  
Acceptance and Enrollment Form

Lisa Maska  
12208 Hollow Tree Ln  
Fairfax, VA 22030-6346

Yes, Don, I want to help Mercy Corps reach out to families in need around the world. I’d like to make tax-deductible monthly gifts in the amount of:

- $20
- $22
- $25
- $30
- Other $____

□ Please transfer the above amount from my bank account each month. I’ve enclosed a check for my first month’s gift from the account I wish to use.

□ Please charge the above amount to my credit card each month. My credit card information is filled out on the reverse.

□ I wish to mail in a check in the above amount each month. My first month’s payment is enclosed.

☐ I cannot accept your invitation to become a Partner in Mercy right now, but I’m enclosing a one-time gift of $____

I authorize Mercy Corps to receive the above amount from my credit card or bank account each month per the terms of agreement listed on the reverse.

Signature (required) ______________________ Date __________

Please make checks payable to:

Mercy Corps

3315 SW First Avenue • Portland, OR 97201 • 800.292.3355, ext. 269
Photo Card Shows How Gifts Can Help

Shows heartwarming photo and tells what donor's gift will provide.
Marine Corps Heritage Foundation’s “Devil Dog Club”

Only automated giving options are offered
Certificate bonds donor and creates excitement about program.
Email Invitation Proves Effective

Dear Ms. Hostetter,

Because of the commitment you have shown to stopping the cruel treatment of animals, I am honored to invite you to join PCRM’s Remembering Rodney Society.

This special group of monthly donors to PCRM was formed to honor Rodney, a special dog who was experimented on in a veterinarian school lab. Rodney’s bones were broken and organs were removed, and he was cut and sewed numerous times before he was euthanized—all in the name of science.

When you join the Remembering Rodney Society, you provide PCRM with the steady funding that is critical to continuing our work—all year long—to promote compassion and health and also to ensure that no more animals like Rodney are harmed.

It would mean so much to the innocent animals we fight for every day if you would become a monthly donor.

Benefits to You

- You have control over your giving. Change your donation amount or cancel at any time.
- Your membership automatically renews. That means the money we save on renewal mailings can go toward
Part 4: Planned Giving
Planned Giving Prospects are Everywhere!

Planned Giving prospects can be identified by their loyalty, not necessarily the size of their gifts.
Families in Gaza Struggle to Survive

Life has never been easy for the 8,000 people of Al Mowass, an isolated strip of small farms, shanty houses and modest compounds near the Mediterranean Sea. According to the UN, since the 1970s, Israeli settlements and military checkpoints have restricted Palestinians' access to the sea (and their ability to fish) to the west, and to schools and jobs in the east.

Today, despite the withdrawal of Israeli forces last summer, residents say things haven’t improved. The Hamas government has not paid public workers in Gaza since February and Israeli border closures are blocking exports from Gaza’s most fertile agricultural region. As a result, the economy is slowing rapidly down.

“Life is so difficult now,” says Najwa, whose husband can only find sporadic part-time work picking potatoes in nearby fields for about $1.40 an hour. “There are no jobs. There is nothing for us.”

Mercy Corps is committed to helping Gaza families persevere through this latest crisis. We are providing staple food supplies—including sacks of flour and sugar and large bottles of vegetable oil—to 450 families in Al Mowass, including Najwa’s family. And a potential job program would provide employment to members of the most vulnerable families.

Like other Gazans, Najwa remains remarkably hopeful. “God willing, the economic situation will get better, and my husband will find a job for the family.”

A Legacy of Compassion

Throughout her long life, Clara Wilderboer touched many hearts. Today, after her recent passing at age 94, she continues to touch lives—a time, thousands of families displaced by the terrible conflict in Sudan.

Deeply affected by the horrors she witnessed during World War II, Clara came to the United States as a widow in the 1940s. She settled in New York and went to work as a nursing governor and caretaker for several families. Clara continued this work until she was in her 70s.

As her days drew to a close, Clara told a long-time friend that she wanted her life savings to go to help families displaced by the violence in Darfur. She decided to leave a large portion of her savings to Mercy Corps to help ease the suffering of men, women and children in this region.

After a life of caring service, Clara’s compassion lives on in Darfur today. Her generosity is making a tangible difference in the lives of families who have lost so much... their homes... their livelihoods... their loved ones.

Please consider including Mercy Corps in your estate plans. To receive personalized information about making a bequest or purchasing a charitable-gift annuity, please contact Jennie Peabody at 1-800-292-1355, ext. 418, or at peabody@mercycorps.org.
Check-off on Reply Forms

Yes, I would like to be an e-friend of the Museum and receive information about Museum programs electronically. My email address is:

☐ Please send me/us information about how to include the Museum in my/our estate plans.

☐ The most cost effective way to acquire new members is to occasionally exchange or rent our mailing list with other carefully selected organizations. If you prefer that we do not exchange your name, please check here.

In accordance with IRS regulations, your gift to the Museum is fully tax-deductible.
Planned Giving Newsletters that Work!

THE EXTRAORDINARY CONTRIBUTIONS of Bill and Melinda Gates and Warren Buffett provide a lesson in philanthropy. While few of us can make gifts on such a large scale as they have, there are good reasons to consider their model of giving while living.

Making a charitable gift during your lifetime — rather than waiting to make a bequest through your Will — can yield immediate benefits for you:

- **First**, you can enjoy the satisfaction of supporting an organization in which you believe, like the Smithsonian National Museum of the American Indian (NMAI), and seeing the positive impact of your gift. You can witness the results of your generosity through the celebrations of Native cultures here at the Museum and through our innovative outreach programs.

- **Second**, you usually gain significant tax advantages from your gift. When you make a charitable gift, you receive an upfront income tax deduction, reducing your current tax bill. You also move money out of your estate, reducing future estate taxes. And if you use long-term appreciated securities such as stocks, bonds, or mutual fund shares to fund your gift, you may be able to
Newsletter Mailings Generate Leads

- Packages should have a letter and reply form
- Donor stories help prospects “visualize” the gift
- Include specific program information
Offer Benefits and Recognition Societies
From the Desk of Jean Wentworth

Dear Friend of GMHC,

Not a day goes by that our dear son Jonathan is not in my thoughts. He left us in 1994, a few years after his partner Gabe, who also died of AIDS.

Kenneth and I wanted to do something to help others affected by this terrible disease, but because we are both musicians, and because Kenneth is retired, we are not rich people. We couldn’t afford to make as large a gift as we would have liked.

However, we did have a will. So, we named GMHC as a beneficiary. It was easy to do, and we’re proud to know that we can help make a lasting impact through our gift to GMHC.

Although we’ll never stop missing Jonathan and Gabe, it helps knowing that our involvement with GMHC, and specifically our bequest, will make a difference to someone else’s child.

Please consider joining us as a Partner in Planning.

Sincerely,

Jean (and Kenneth) Wentworth
Members, Partners in Planning since 1995
Make Sure Official Language Is Easy to Find
Reply Form Needs to Collect Information

![Gift Annuity Information Form](image)
Include “Personalized Case”

Base on age overlays, but don’t be explicit…
Contact Information

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