

DATE YOUR DONORS

HOW TO ATTRACT AND ENGAGE A NEW GENERATION OF PHILANTHROPISTS



WELCOME!

PRESENTED BY

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President

ALTRUICITY

 **ALTRUICITY**

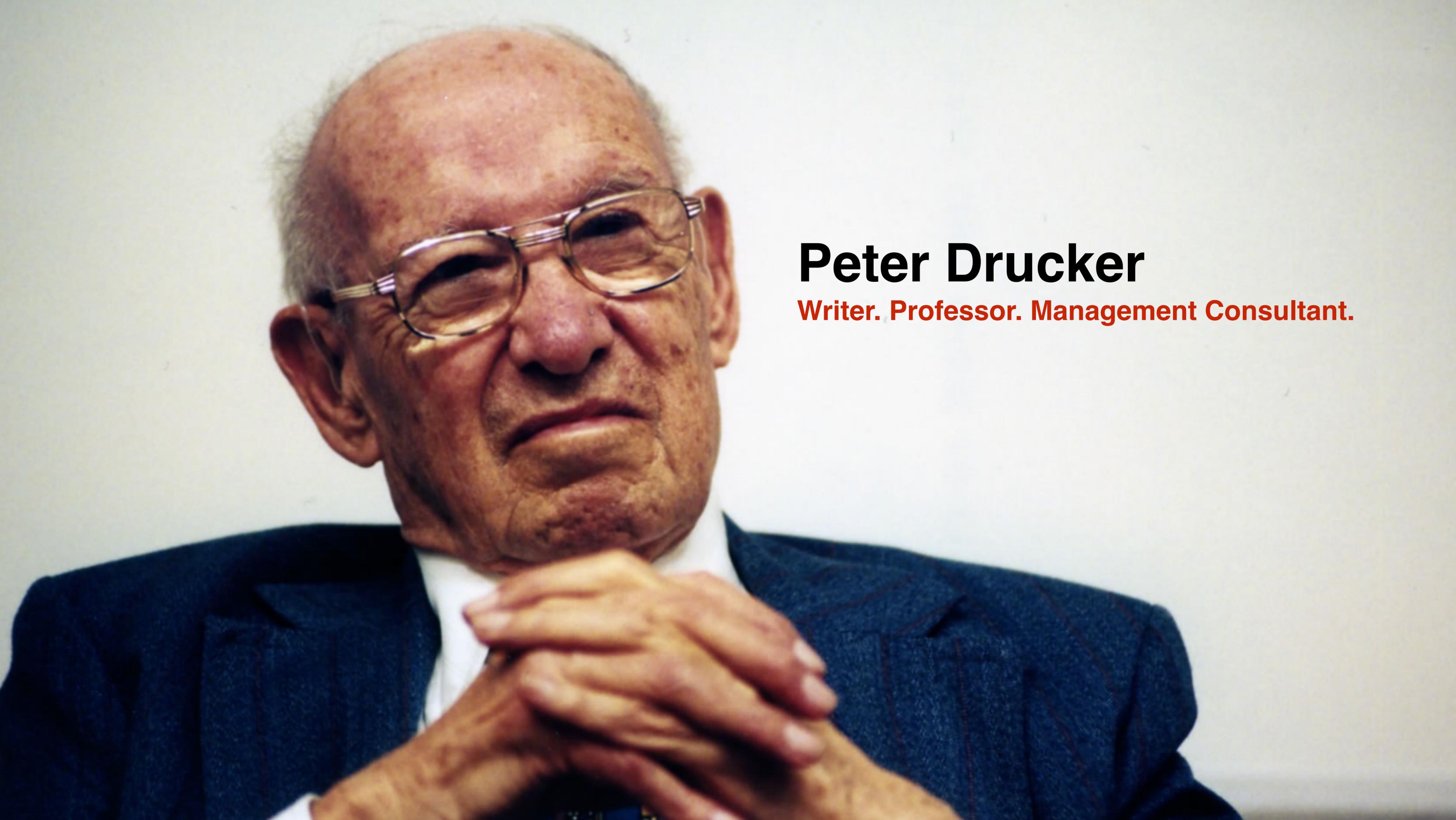
Hi! My Name is Jonah Halper.

WILL YOU MARRY ME?



Hi! My Name is Jonah Halper.
WILL YOU MAKE A GIFT?





Peter Drucker

Writer. Professor. Management Consultant.

MISSION
MARKETING
MANPOWER
MONEY

MISSION

&

VISION



Ben Zander

Composer. Conductor. Educator.

Everyone loves *your school*.
They Just Don't Know it Yet.

YOUR MISSION

IS ABOUT WHO YOU ARE

YOUR VISION

IS ABOUT WHO YOU WANT TO BE

Dating Rule #1
CONFIDENCE

MARKETING

We are hemorrhaging donors



Times Square...1950s.

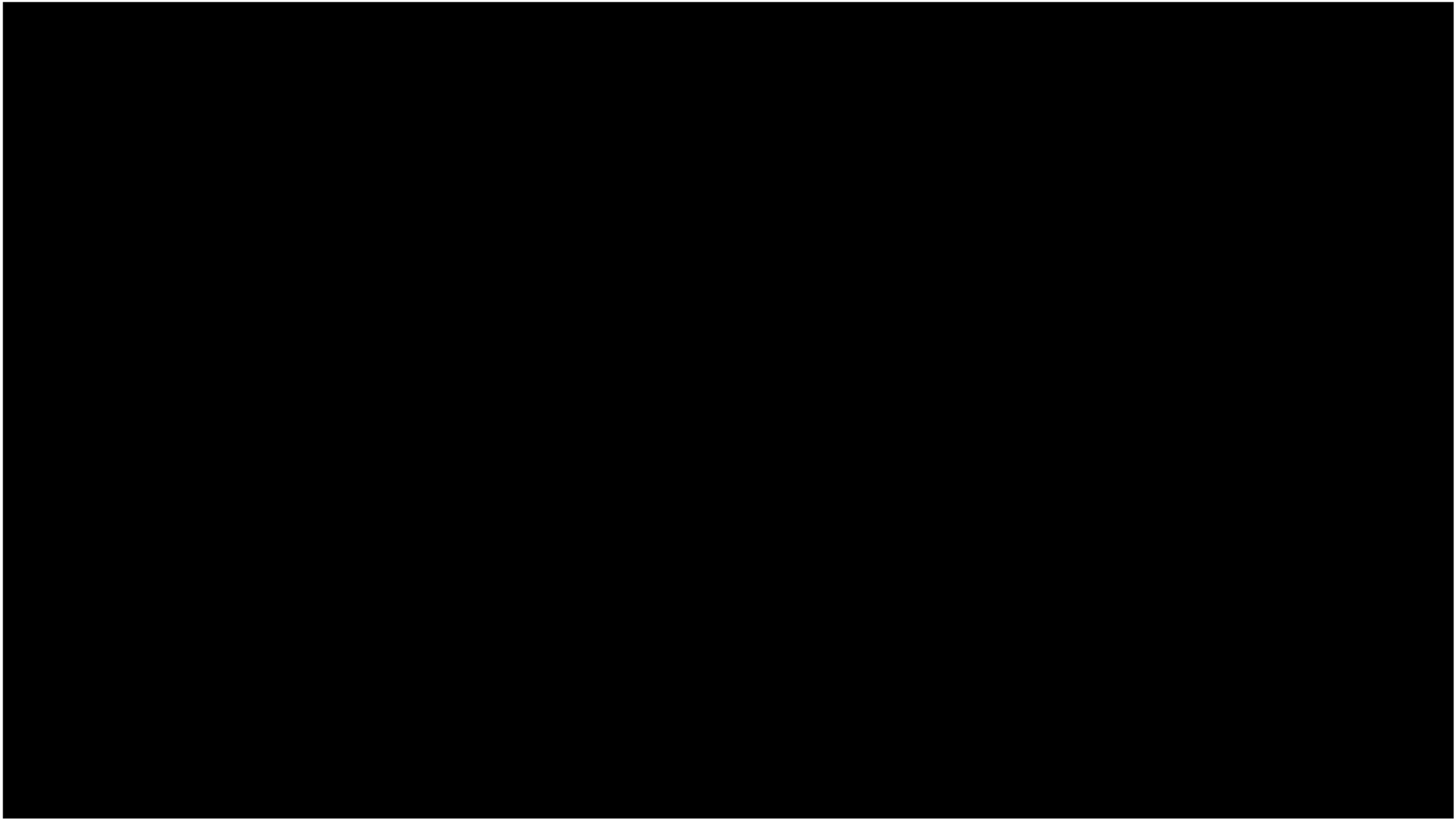


Times Square... Today.



So many options...and choices.





GET PERMISSION



HOW DO YOU KNOW IF THEY CARE?

WOULD YOU LIKE TO
LEARN ABOUT THE
CHURCH OF LATTER
DAY SAINTS?

1 in 1,000



HOW DO YOU KNOW IF THEY CARE?



*WHAT IS SOMETHING THAT IS A
LOW BARRIER TO ENTRY THAT WILL
HELP YOU IDENTIFY THOSE WHO CARE?*

WOULD YOU LIKE TO
SAY A PRAYER WITH ME?

1 in 7



Dating Rule #2

STAND OUT

MANPOWER

Mavens
Connectors
Salesmen





Dating Rule #3

LOOK TO YOUR FRIENDS

MONEY

A pair of hands with light-colored nail polish is shown from a top-down perspective, cupping a large pile of gold coins. A small, vibrant green basil plant with several leaves is growing out of the center of the coins. The background is a soft, out-of-focus light blue and white.

TREAT YOU LIKE AN INVESTOR
SOCIAL IMPACT OF OUR RELATIONSHIP

RATE YOUR PROSPECTS

C

CAPACITY

This one's the obvious one...do they have money?

P

PASSION

Do their values align with your mission and vision?

R

RELATIONSHIP

Are you connected to them already, or at most one degree away?

DEVELOP A DONOR PIPELINE



*IF THEY AREN'T ON A LIST,
THEY WON'T BE A PRIORITY*

I	J	K	L	M	N	O	P	Q	R	S	T
Status open/ closed/ return	Account Type	Rating (A/B/C)	Pledge made	Payments made	Balance Owed	Total Projection Conservative	Total Projection Aggressive	Additional ask	New Pledge Amount	Legacy Prospects ready for conversation	Next steps
open	SINGLE	A				\$25,000	\$36,000				
open	ASSOCIATE	A				\$36,000	\$50,000				
open	FULL - Family	A				\$36,000	\$54,000				Send detailed email and ask for a follow up meeting
return	FULL - Family	A	\$36,000		\$36,000		\$0	\$18,000			
return	FULL - Family	A				IN KIND	IN KIND				
open	FULL - Family	A				\$15,000	\$25,000				
open	FULL - Family	A			\$0	IN KIND?	IN KIND?				
return	SPONSORING MEMBER - Full	A	\$250,150	\$150	\$250,000	\$250,000	\$250,000				
return	SPONSORING MEMBER - Full	A	\$250,000	\$250,000	\$0	\$250,000	\$250,000				
return	FULL - Family	A	\$50,000		\$50,000			\$50,000			
return	FULL - Family	A	\$100,000	\$10,000	\$90,000		x				
return	SPONSORING MEMBER - Full	A	\$55,800	\$33,455	\$22,345	\$44,200	\$45,200	\$16,200			
return	FULL - Family	A	\$100,000	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000		x	
return	FULL - Family	A	\$36,000		\$36,000	\$0	\$0	\$18,000			
return	FULL - Family	A	\$30,435	\$11,667	\$18,768	\$0	\$0				
return	FULL - Family	A	\$36,000	\$21,600	\$14,400	\$18,000	\$18,000				
return	FULL - Family	A	\$10,000	\$10,000	\$0					x	
open	FULL - Family	A				\$100,000	\$150,000				Send detailed email and ask for a follow up meeting
open	FULL - Family	A				\$25,000	\$36,000				Send detailed email and ask for a follow up meeting
open	SINGLE	A				\$5,000	\$10,000				Schedule meeting
open	FULL - Family	A				\$10,000	\$15,000				
open	FULL - Family	A			\$0	\$36,000	\$50,000			x	Send detailed email and ask for a follow up meeting
open	FULL - Family	A			\$0	\$75,000	\$100,000				Send detailed email and ask for a follow up meeting
open	FULL - Family	A			\$0	\$36,000	\$72,000				Shulchan in Main Shul or Shulchan Cover in the BM
open	FULL - Family	A									
closed	FULL - Family	A	\$10,000			\$36,000	\$54,000				
open	FULL - Family	A			\$0	\$36,000	\$50,000				
open	FULL - Family	A				\$10,000	\$15,000				

TRACK YOUR RELATIONSHIPS



THESE TASKS ARE IMPORTANT,
BUT NOT URGENT!

The screenshot shows the Asana interface for a project named 'RAG Pipeline'. The left sidebar contains navigation options like 'Reports', 'Team Conversations', and 'Projects'. The main area displays a list of tasks with their titles, assignees, and due dates. The tasks are:

- Speak to Moshe Dov about Dovie (GIBBER, Dovie) - May 25
- Meeting (PREISEROWICZ, Yanky) - May 25
- Meeting (RUSSEL, Robert C and Irene) - May 25
- Follow up re: his pledge (NEUBERGER, Isaac) - May 25
- Follow up re: Pick up check and discuss capital (RIVLIN, David - HEYMAN FOUNDATION) - May 26
- Call Tommy (WEISS, Tommy (Mother Magda A"H just passed away)) - May 26
- Calling him for update (ROCHKIND, Shmuel and Rochel) - May 26
- follow up on brief conversation (FINKELSTEIN, Kalman) - May 26
- Follow up with Shlomo to close him (REITBERGER, Jason and Shani) - May 26
- Follow up re: pledge (WERTENTEIL, Peretz and Sarala) - May 26
- Hopefully meet for capital campaign (DAVISON, John) - Jun 5
- Follow up re: meeting (RAY, Barry) - Jun 26
- Call him to check back for his gift - \$30K (BRAVMANN, Shmuel and Pnina) - Aug 1

Below the list is a section for 'No due date'.

IT'S ABOUT RELATIONSHIPS



**WITH 1,000 OPTIONS,
THIS IS THE ONLY WAY TO STAND OUT!**



01

TREAT THEM LIKE PARTNERS

*HOW IS THEIR GIFT
MAKING AN IMPACT*



Friday	Saturday	Sunday
MAY 6	MAY 7	MAY 8

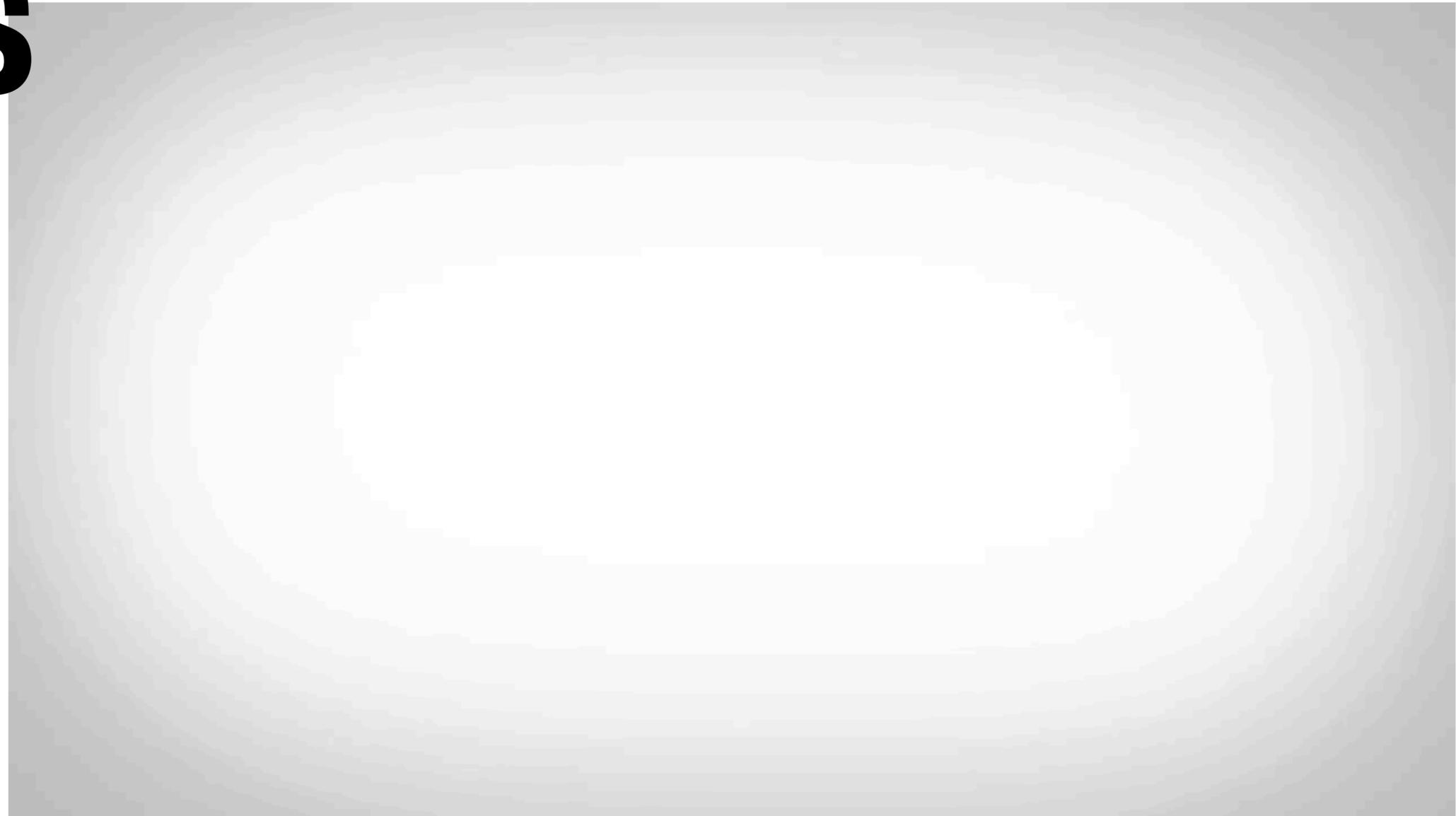


CREATE A CLEARINGHOUSE OF ENGAGEMENT OPPORTUNITIES

02

THANKING YOUR DONORS

 REMIND THEM
WHY THEY GAVE



Dating Rule #4

SEEK A PARTNER, NOT AN ATM

pas • sion

Origin:

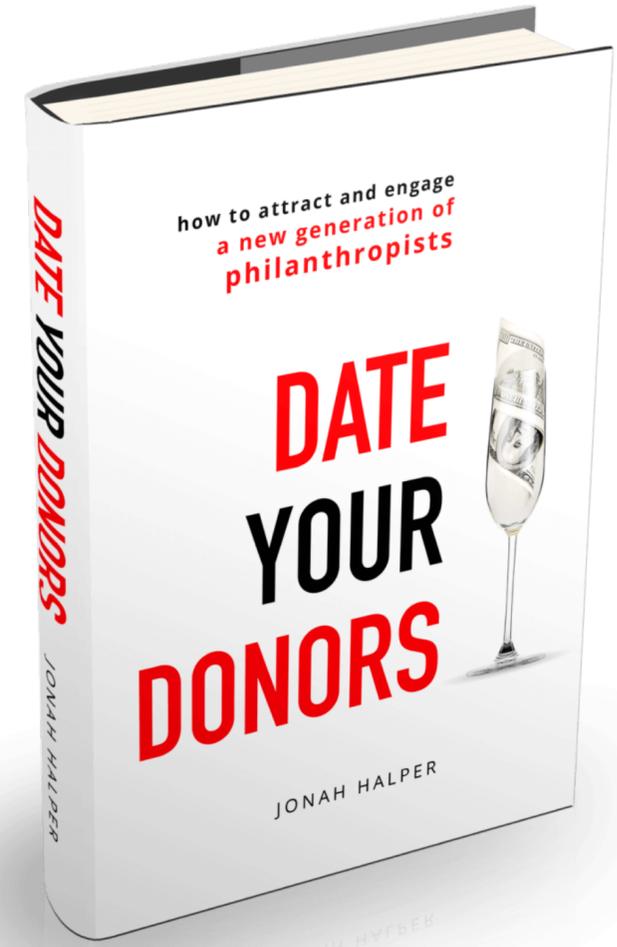
LATIN LATE LATIN OLD FRENCH
pati → passio → passion

Middle English: from Late Latin passio(n) (chiefly in Christian theology), from Latin pati 'suffer.'

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THANK YOU!



**SCAN THIS BARCODE AND
A FREE DIGITAL COPY
WILL BE EMAILED TO YOU.**

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President
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