

THE THREE PART ASK

*Preparing your Peer-To-Peer Network
to Ask for the Big Gift*



The Three-Part Ask

Doing It Often...Doing It Well



Systematic peer-to-peer solicitations are most effective when the organization goes through the intentional process of training their strongest volunteers in how to make the “three- part ask”. The success of peer-to-peer fundraising is based on friends asking friends to join the campaign. Though it may be necessary to use staff, administration, or board members to make the solicitation the ideal presentation should include a volunteer (already in relationship) who can look their friend in the eye and invite them to give the big gift.

Concerning the “three-part ask”...what’s the difference between an operations gift, capital gift, and planned gift?

#1 - OPERATIONS GIFT

An Operations Campaign is an organized effort to obtain gifts on a yearly basis to support, at least in part, the ongoing expenses of a nonprofit organization. Funds are typically raised through mail or direct solicitation efforts.

Actual solicitations for an Operations Campaign may take place more than once a year (via direct mail or telephone) but is distinguished by its regularity. These types of commitments are usually for unrestricted income and often represent a substantial percentage of a nonprofit's income.

#2 - CAPITAL GIFT

A project campaign is a time-limited effort by a nonprofit organization to raise significant dollars for a specific project. Often the money raised is to fund the acquisition, construction, or renovation of a building. Sometimes, project campaigns are used to build an endowment for the future or to fund a one-time extraordinary expenditure such as an expensive piece of equipment.

Project campaigns have a beginning and an end, but often span multiple years. This type of effort employs all the usual means of raising funds such as direct mail, special events, and face-to-face solicitations. They always require extraordinary preparation and skillful execution.

#3 - PLANNED GIFT

Planned Giving is a set of ways a donor can leave money/assets to a nonprofit at his/her death; or a way to invest money so that the donor and/or the nonprofit receives benefits during his/her life and then bequeaths the remaining funds to the organization. Planned Giving is a complex program of various financial instruments that can be adapted to each donor's needs.

Nonprofits can enlist professional help in setting up their planned giving programs and hire staff educated in planned giving methods.

HOW IS IT DONE?

The three-part ask is generally presented in the following order:

First, invite the donor to make (or increase) their multi-year gift commitment to sustain the critical ongoing operations of the nonprofit.

Second, upon securing their operations pledge, invite the prospect to make a “stretch-gift” to the one time project. (Consider asking for a gift ten times greater than their annual investment.)

Finally, invite the donor to make either a current gift or an estate gift to endowment.



What's to be gained?

First, the danger of “robbing Peter to pay Paul” is drastically reduced.

Second, the WIN, KEEP, & LIFT concept of increasing a donor’s annual gift commitment to operations can be explored.

Third, this may be the first time an opportunity has presented itself to formally ask the prospect to consider making an estate gift to the organization.

SAMPLE TWO PAGE - GIFT AGREEMENT SIGNATURE FORM



St. Anthony of Padua

CATHOLIC SCHOOL

“WEAVING A BRIGHT FUTURE” CAPITAL CAMPAIGN

CAMPAIGN GIFT COMMITMENT PLEDGE:

1 - OPERATIONS GIFT COMMITMENT (Five-Year Gift):

Yes, I/we would like to make a pledge commitment to support ongoing operations.

\$ _____ remitted over _____ Year(s) First Remittance: \$ _____

Remainder: \$ _____ Annually Quarterly Monthly To Begin: ____/____/____

2 - PROJECT GIFT COMMITMENT:

Yes, I/we would like to make a capital gift to the special project

\$ _____ remitted over _____ Year(s) First Remittance: \$ _____

Remainder: \$ _____ Annually Quarterly Monthly To Begin: ____/____/____

3- ENDOWMENT GIFT COMMITMENT:

Yes, I/we would like to make a gift to the Endowment Campaign.

\$ _____ remitted over _____ Year(s) First Remittance: \$ _____

Remainder: \$ _____ Annually Quarterly Monthly To Begin: ____/____/____

Yes, we/I would like to make a gift to the Endowment Campaign through our will/estate and understand that a representative from St. Anthony of Padua will be in contact.

TOTAL CAMPAIGN GIFT COMMITMENT: \$ _____

RECOGNITION OPPORTUNITIES:

THE PADUA SOCIETY:

I would like to join the PADUA SOCIETY as a member of the:

FOUNDER'S CIRCLE (\$1,000,000+)

DEAN'S CIRCLE (\$25,000+)

CHAIRMAN'S CIRCLE (\$250,000+)

HONOR ROLL MEMBER (\$5,000+)

PROVOST'S CIRCLE (\$100,000+)

COMMEMORATIVE OPPORTUNITIES:

I would like to associate my gift with one or more of the following naming opportunities:

<input type="checkbox"/> Education Center	\$1,000,000	<input type="checkbox"/> Bleachers	\$50,000
<input type="checkbox"/> Gymnasium	\$1,000,000	<input type="checkbox"/> Teacher's Lounge	\$50,000
<input type="checkbox"/> Entrance/Foyer	\$300,000	<input type="checkbox"/> Classrooms (6)	\$50,000
<input type="checkbox"/> Elementary Wing	\$300,000	<input type="checkbox"/> Classrooms (3)	\$30,000
<input type="checkbox"/> Library	\$250,000	<input type="checkbox"/> Nurse's Office	\$25,000
<input type="checkbox"/> Playground Area	\$200,000	<input type="checkbox"/> Kitchen	\$25,000
<input type="checkbox"/> Kindergarten Wing	\$150,000	<input type="checkbox"/> Elementary Wing Stairway	\$25,000
<input type="checkbox"/> Principal's Office	\$100,000	<input type="checkbox"/> Accounting Office	\$10,000
<input type="checkbox"/> Circular Stairway	\$100,000	<input type="checkbox"/> Benches (up to 10)	\$5,000

MEMORIAL & TRIBUTE OPPORTUNITIES:

I would like to make my gift in:

Honor of: _____

Memory of: _____

I understand this commitment may be changed or canceled at any time, if circumstances require, by informing the organization in writing. All gifts are fully deductible for federal income tax purposes to the extent allowed by law. Thank you.

Donor Name _____
(as you wish for it to appear in print)

Address _____

City/State/Zip _____

Phone _____ E-Mail _____

Campaign Representative _____

Signature of Donor(s) _____ Date _____

Please make all payments (check, stock transfers, etc.) payable to:

ST. ANTHONY OF PADUA

887 Grand Avenue - Langston, PA 15445-9901 Voice: (722) 432-4912 Fax: (722) 432-1415

E-Mail: lance@saop.com Web: www.saop.org

AUTHOR – THE THREE PART ASK

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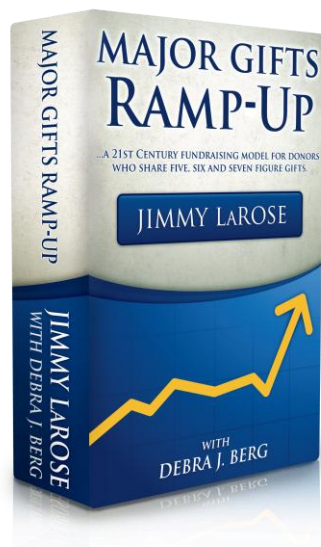
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James P. LaRose, CFRE, CNC known around the world as “Jimmy LaRose the Fundraiser's Fundraiser,” continues to transform nonprofit executives tasked with the raising of money in a tumultuous 21st Century economy. His passion for the nonprofit sector is without bounds and his love for the leaders who serve is unparalleled. His heroes are those men and women of the



charitable world who lay down their lives daily for the hurting and the hopeless. He’s spent the last twenty years supporting executives, volunteers, staff and board members across six continents who spend themselves in service to others. Jimmy is fond of sharing with professionals that, “Money chases after ideas, and there will always be generous people who will amply support a great dream backed by a sound plan.” Jimmy is the founder of the National Development Institute, Development Systems International and ProPlatforms.com. He is the author of the internationally recognized fundraising series MAJOR GIFTS RAMP-UP and is the designer of the MAJOR GIFTS RAMP-UP CLOUD, a

complete back-office for nonprofit executives. Jimmy led the design team that established Certified Nonprofit Consultant (CNC), a credentialing process that supports nonprofit executives committed to sharing their management experience with their peers. He is the co-founder of the CauseCause.com platform, an online social media community network that supports citizens of the world committed to advancing the common good. He is the co-founder of DonorScope.com, a web-based research portal that identifies philanthropists, altruists, and leaders and their capacity to give to causes for which they personally care. Jimmy has been credentialed by the National Development Institute as a Certified Nonprofit Consultant (CNC) and holds the Certified Fund Raising Executive (CFRE) certification. He is the founding President of the Western Maryland Chapter of the Association of Fundraising Professionals (AFP) and is a graduate of AFP's Faculty Training Academy (FTA) and has been named by the AFP as a “Subject



Matter Expert” on the raising of money. Jimmy has also served as a specialist with the U.S. State Department's Speakers Bureau and has traveled the world working with embassies, foreign governments, and leaders to promote philanthropy and civil society in developing countries. He is a graduate of Indiana University's Executive Leadership Program, Indianapolis, IN, the National Planned Giving Institute, Memphis, TN, Tennessee Temple University, Chattanooga, TN and the Word of Life Bible Institute, Schroon Lake, NY. Rev. LaRose was ordained as minister of the gospel by the Ecumenical Church of Christ in 2010 to further support his service to the hurting and the hopeless around the world. Jimmy and his wife Dianne make their home in Columbia, SC and are blessed with three children and three grandchildren.



ADDITIONAL ONLINE FUNDRAISING RESOURCES:

www.JimmyLaRose.com

www.ConsultingCertification.org

www.DonorScope.com

www.PAXglobal.com

www.FundraisingFarmer.com

www.facebook.com/nonprofitdevelopment

www.MajorGiftsRampUp.com

www.NonprofitConferences.org

www.Development.net

www.eMediaFundraising.com

www.twitter.com/jimmylarose

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