The Four Decisions Tutorial

An Introduction to Donor-Participatory Fundraising

- **Are your frontline fundraising staff leaving gifts on the table by working transactionally?**
- **Are you ready to get out of the "major gifts" VS "planned gifts" boxes that limit your results?**
- **Is it time to strengthen the working relationship between the frontline staff and your gift planning office?**

This training program introduces you to a specific approach to asking for charitable gifts and to the philosophy of donor-participatory fundraising. It's this simple: **don't ask for contributions; ask for conversations.** Those conversations are centered around these decisions. When you are successful, you will have addressed all four:

- ✓ WHY the prospective donor wants to discuss giving with you. It addresses experiences, memories, feelings, dreams. It's the emotional foundation on which the gift is built.
- ✓ For WHAT the gift will be designated, where at your nonprofit it will be put to work.
- ✓ HOW the gift plan will be structured – when, with what assets, and in conjunction with what other considerations and priorities.
- ✓ WILL YOU give? Only this is the ask.

Your introduction to **The Four Decisions** consists of a six-lesson curriculum designed specifically to help strengthen your skills in the only place it matters – in front of your future donors.

The course is taught virtually, using a free online meeting service which includes both audio and visual components. This avoids any travel-related costs to the client organization or the individual student.

> **"This training program has benefited us far beyond what we initially foresaw. We wanted to increase deferred giving and that has happened. The great surprise has been the significant increase in outright gifts, not to mention the strong partnerships the office of planned giving enjoys with fundraising staff across the Smithsonian. We can point to at least $30 million in additional gifts that we most likely would not have received without this training support."**
> *John-Joseph van Haelewyn, Director of Planned Giving, Smithsonian Institution*

> **"Having completed and benefited from Dan's Conversational Gift Planning tutorial myself, I enrolled the major gift staff at Lawrence Technological University in his Four Decisions Tutorial. The feedback on the training experience from my staff was terrific (it confirmed my own experience). More important, the results with prospective donors have been all I had hoped for. Our staff are working more intentionally, developing stronger donor relationships, and pursuing more and larger gifts. I highly recommend Dan and his outstanding program."**
> *Greg Cascione, Special Assistant to the President for Development and Alumni Relations*
> *Lawrence Technological University*

The Four Decisions
Basic Coaching Schedule

You must first earn the right to discuss gifts of assets other than cash. Before you describe the due diligence required for a gift of real estate you must identify a good candidate for a bargain sale. Before you discuss a gift of shares from a closely held business you must find a partner/shareholder of a Limited Liability Company or an S-corporation. Before you get to explain how a charitable remainder trust works you must find a good candidate for a retirement CRUT.

Sessions 1-4 include our **High Probability Fundraising seminar** – the same curriculum that has been taught to hundreds of fundraising professionals at the American Civil Liberties Union, Columbia University, Cornell University, Lawrence Technological University, Rochester Institute of Technology, the Smithsonian Institution, and World Wildlife Fund. You will also be enrolled in *The Four Decisions Online* for the duration of the course. You are encouraged to use this e-learning version of the course to supplement and reinforce your training experience.

Session 1 90 minutes	**WHY** (Decision One)
Session 2 90 minutes	**Introduction to The Two Part Conversation** **WHAT** (Decision Two)
Session 3 90 minutes	**HOW** (Decision Three)
Session 4 90 minutes	**WILL YOU?** (Decision Four)
Session 5 90 minutes	**Practice, using an Interactive Case Study**
Session 6 90 minutes	**Discuss YOUR cases; apply lessons learned**

You may purchase additional case review sessions or Interactive Case Studies as needed, well beyond this training. Contact us to discuss our Coach-on-Call program.