



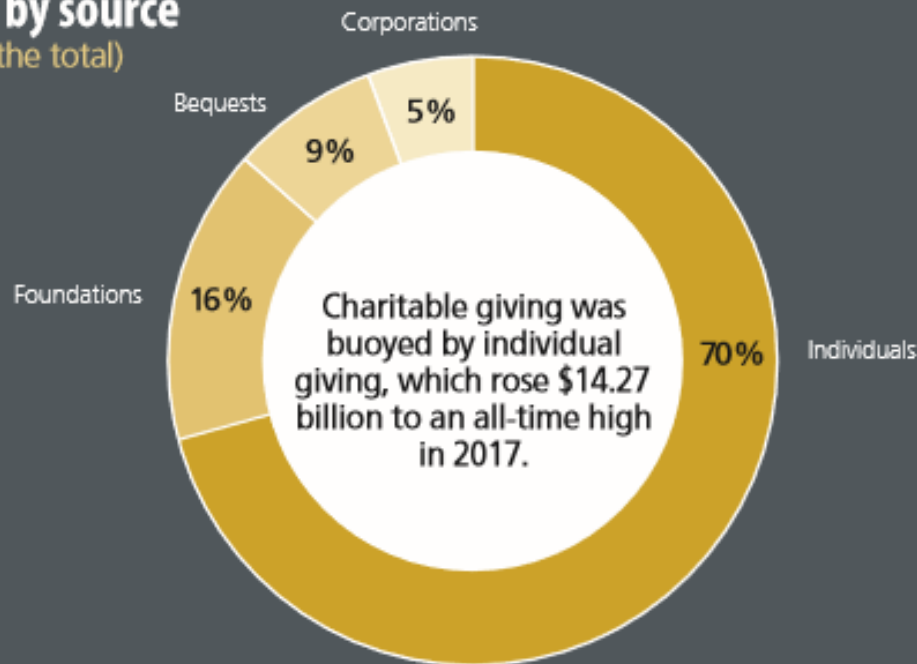
Getting Your Major Gifts Program Off the Ground

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Giving USA Annual Report on Philanthropy

Total 2017 contributions: **\$410.02 billion**

Contributions by source (by percentage of the total)



+5.2%
Total estimated U.S. charitable giving

increased by 5.2 percent, to \$410.02 billion, in 2017

+5.2%
Giving by Individuals

is estimated to have increased by 5.2 percent.

+6.0%
Giving by Foundations

is estimated to have increased by 6.0 percent.

TYPES OF FUNDRAISING

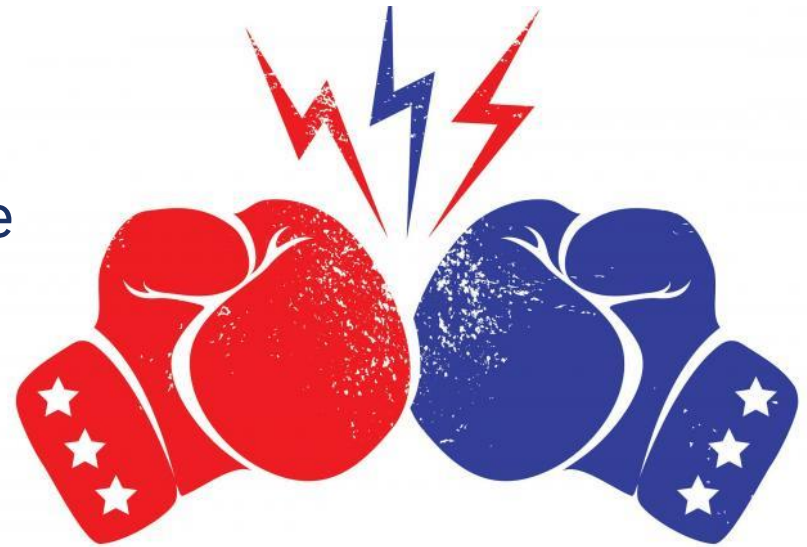
Transactional fundraising

- Smaller asks
- Limited communication
- Events, direct mail
- Tend to have high expense

-VS.-

Relational fundraising

- Regular Meetings
- Home Visits/Coffee/Lunch
- Ongoing Communication
- More Personal
- Significant ROI



QUALITY VS. QUANTITY

“Quantity” donations: Smaller asks, many donors.
\$50,000 Goal = 500 people giving \$100 each.



“Quality” donations: Fewer asks with higher returns.
\$50,000 Goal = Two \$25,000 gifts or Five \$10,000 gifts



Both strategies can have a profound effect on mission.

YOU MUST HAVE A PLAN



WHO? Who will raise the money?
Who will give the money?

WHAT? What is a major gift to your organization?

WHEN? Build a timeline. Establish deadlines and milestones.

WHY? In addition to the broader mission, you need a strong case for support.

HOW? You need a plan around giving opportunities, goals and a method to track, report and analyze.

What is a major gift, to YOU?

Determine what a “major gift” is to your organization



What is your goal?

How much does your organization want to raise through major gifts?

WHO | The Fundraisers

Staff – Dedicated major gift professional or someone who “owns” the major gift program, its goals and objectives. Support staff to research prospects and prepare proposals.

Volunteers – Board members, advisory councils, steering committees and other community leaders who will support you in your work to secure major gifts

Organizational Leadership – Executive Director/CEO and other organizational leader’s buy-in and participation in raising major gifts, both the plan and the process.

**Keep in mind, many/all
may need training**



For those who already give, you should assess:

- Propensity to give to you and to others
- Affinity to your organization
- Capacity of your donors (wealth screening)
- RFM Score - Recency, Frequency, Monetary Support
555 highest score, 111 lowest score



To identify new major gift prospects:

- Engage your board! “Identification” is one of the most important volunteer roles of your board
- This process also plants the seed to engage volunteers to cultivate and solicit donors

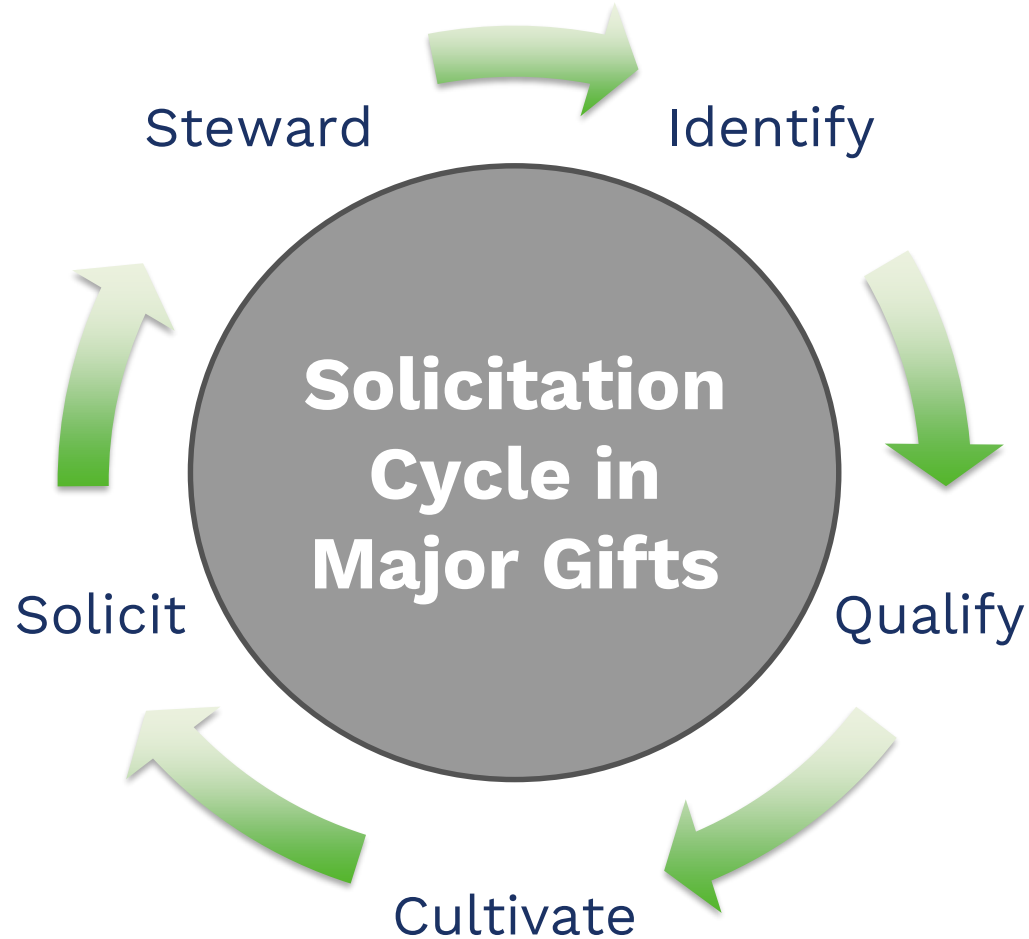


WHO? | The Prospects

A POTENTIAL PROSPECT IS ANYONE WITH EVIDENCE OF:

Gratitude	For your mission and it's impact on themselves or a loved one
Interest or Curiosity	Overall interest in the organization's mission. Expressed interest that demonstrates they would like to know more.
Relationships	Long-standing donor or mission recipient
Family History	Long-standing family involvement with the organization
Generosity	An unsolicited donor A philanthropist to other organizations A person who invests in excellence
Wealth	Professional position and/or reputation Vacations or extensive travel Additional homes/Children's schools
Personal Contacts	A friend, family member or peer of one or more of the organization's board members or other organizational leadership
Other	A foundation officer – someone who runs or works for a foundation A person with no or few heirs

HOW? | The Solicitation Cycle



Potential cultivation activities:

- A tour of your facility
- Lunch/Coffee
- Invitation to your mission in action
 - ❖ Mealtime at a soup kitchen
 - ❖ Visit to a classroom
 - ❖ Ticket to a performance
 - ❖ NICU visit
- Meet & greet with organization's leadership
- Invitation to exclusive gathering to learn about the mission

How much cultivation?

- Every donor is different
- Some prospects want limited contact. Watch for cues.
- Others want to get to know an organization thoroughly.

Cultivation outcomes:

- Relationship development
- Deeper mutual understanding
- A better solicitation experience
- Determining:
 - a. the **RIGHT TIME** to solicit a gift
 - b. the **RIGHT PURPOSE** for the gift
 - c. the **RIGHT AMOUNT** to ask for
 - d. the **RIGHT TEAM** for the visit

Keys to effective solicitations:

- **BE PREPARED.** Don't "wing it."
- **SOLICIT IN PAIRS.** The best solicitation teams offer a relationship with the prospect and deep knowledge of the campaign, the project, and the organization.
- Be sure volunteers **COMMIT THEIR OWN GIFTS** before asking others.
- **ASK FOR A SPECIFIC AMOUNT** (or range, when appropriate) and let the donor know that they can determine – within limits – how and when they will fund their commitment.
- **DON'T RUSH** to make "the ask" too early in the conversation.
- **LISTEN.** Seek feedback. Answer questions.

- ✓ **Check in regularly** via email/phone/note
- ✓ **Demonstrate impact** through:
 - Formal Publications
 - Project/program updates
 - Tour/facility visit
 - Organizational updates



Set your goals around MOVES management:

	Identification	Cultivation	Solicitation	Stewardship
Staff	Bring XX new prospect names to monthly meetings	XX external meetings each week/month. XX actions each week/month	Solicit XX gifts each month. Raise \$XX each year	XX external meetings each week/month XX actions each week/month
Board (collective or individual)	Identify XX new prospects each year Invite XX new prospects to events each year	Host guests at annual events Attend XX meetings per year Hold XX tours each year	Secure \$XX each year Participate in XX solicitation meetings per year (second seat)	Participate in recognition activities for XX appeals (calls/notes) Host donors to XX in-home events

Hold yourself and others accountable!

- Share your plan with organizational leadership and Board of Directors
- Report out regularly on progress
- Check in often on status/gap to goal
- Develop strategies to address shortfalls

WHY? | What to support?

What do you need your donors give to?

Restricted Dollars	Unrestricted Dollars
Organizational Need	Comprehensive Plan
Specific Project/Program	Giving Society
Naming Opportunities	Giving Circles



WHY? | The Case for Support

EMOTIONAL DONORS



These donors give from the heart. The best way to appeal to emotional donors is to share personal stories that demonstrate the impact of Kessler Foundation on people with disabilities.

BUSINESS-MINDED DONORS



These donors want to know that there has been thorough planning and evaluation and that the end result of the project, and of fundraising, will provide the intended solution. They respond to facts, figures and outcomes.

TOP 10 REASONS PEOPLE GIVE

- 1** **Because they were asked**
- 2** **Relationship to the solicitor/organization**
- 3** **Belief in the mission or interest in the project**
- 4** **To leave a legacy**
- 5** **To challenge or inspire others**
- 6** Financial stability of the nonprofit
- 7** To get recognition
- 8** Persuasive appeal of communications material
- 9** Tax benefits
- 10** Guilt or pressure

WHEN? | Establish Your Timeline

Some timeline elements to consider:

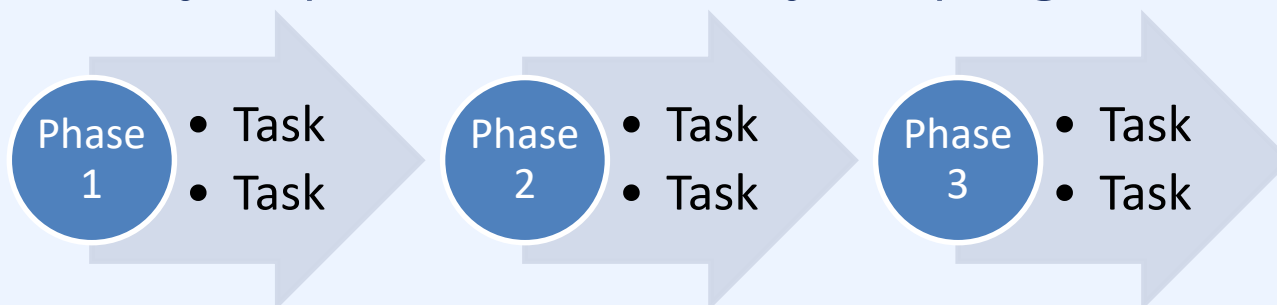
How much do you intend to raise and by when?

When will you have:

- Plans built around: Identification, Cultivation, Solicitation, Stewardship
- Organizational leadership oriented and bought in
- Staff selected/hired
- Case for support developed
- Volunteers engaged
- All stakeholders trained

What is your target date to begin cultivation/solicitation?

When will you pause to assess your progress?



TO SUM IT UP

1. Begin to think of the shift to relational fundraising
2. Evaluate your current status and necessary steps
3. Discuss the concept and initial plans with your ED/CEO
4. Build your plan
5. Establish goals, timeline and metrics
6. Introduce the plan to staff and/or hire necessary staff
7. Identify quick wins to demonstrate momentum
8. Begin identification, cultivation activities
9. Check in with goals regularly and report out
10. Celebrate victories!

QUESTIONS **&** **DISCUSSION**



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