


Moving into Major Gifts: Helping Generous People Make the World a Better Place

*Mary Henry,
Donor Relations Manager
Oregon Humane Society*



Bridging the Gap

“Sending An
Appeal”

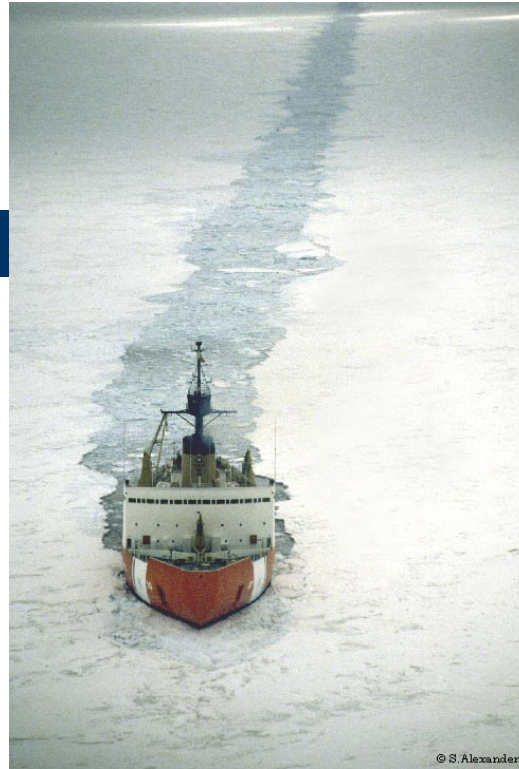


“Making The
Ask”

Agenda

- Introductions
- Overview
- Case study
- Q&A

Icebreaker



- Who's here today?
- What do you hope to find out?

Where I learned

The Nature Conservancy – World's largest system land preserves, 5 major gift officers in 4 cities.



– Statewide. Hired by the founder. One-person shop.



– 142-year old organization, broad public support, no major giving program.

Goals

- Expand the number of donors giving at top levels
- Increase the amount of their gifts
- Involve your board and executive director in engaging major donors

Finding True North



Organization mission & goals
Professional ethics
Personal integrity

Why donors support our work

- Support the mission
- Respect leadership
- Comfortable their money is well-spent
- Feels great!

Strategies

- Get to know your top givers and their individual interests and values.
- Make sure they know you appreciate their contributions.
- Find ways to involve them in your work.
- Craft giving opportunities that appeal to their interests.

When it's important

- Expanding program needs.
- Readiness for a capital or endowment drive.

Friendship

- Top donors are your organization's best friends.

Friendship

“A 2006 study in the *American Sociological Review* found that Americans on average had only two close friends in which to confide, which was down from an average of three in 1985.”

- *Wikipedia*

Friendship

- Do things together we both like to do
- Keep in touch
- Help me through rough times
- Are there when I need them
- Make me feel special
- Keep my secrets/trustworthy
- Honest with me
- Listen to me!
- Ask my advice...and sometimes even take it!

Ways to stay in touch

- Telephone Calls (thank you, get-acquainted, ask advice – soon they'll be calling you!)
- Events – small group, large board-centered event
- Meetings and tours
- Letters & cards
- Surveys
- Magazine and e-newsletters

Personalize, Personalize, Personalize

Real ink!

Personalized salutations

Hand-addressing

Handwritten PS or note on invitation

Donor Choice- Giving to what matters most

General operating support allows us the flexibility to invest where the need is greatest.

Dedicated gifts allow donor to invest in the programs that matter most to them, and hence may increase the size of their gifts.

Who should work on major gifts?

- Executive Director
- Board members
- Program staff & volunteers
- YOU

Executive's Role

- Organization personified
- Lead by example – give personally
- Build organizational collaboration & culture of philanthropy
- Work personally with top donors
- Increasing involvement as donors giving increases
- Identify top funding needs

Board members' role

- Lead by example – give generously
- Serve as community ambassadors
- Rate & screen names
- Invite guests to events
- Board donor partners
- Governance & oversight

Board Thank-you calls

“Did you know you can help increase the size of gifts by 39% without ever asking anyone for money?”

- 96% of donors would be very appreciative if a board member called them within 1-2 days of their gift just to say thank you.
- 85% would probably support again.
- 86% would definitely or probably give a larger gift the next time.

-Penelope Burke, Cygnus Research Group

Your role

- Development Director
- Major Gifts Officer
- Donor Relations Manager
- Vice President for Advancement
- Director of Philanthropy
- Senior Advisor to the President
- Individual Giving Coordinator

Segmenting – How and how many?

- Top 100 Annual Givers
- Top 100 Lifetime Givers
- Prospects who...
 - Give slightly below these levels
 - Used to give at leadership levels
 - Know a decision-maker in your organization
 - Have the capacity to give at leadership levels

Who are these people, anyway?

- Donor files & database
- Online research
- Rate & screen
- Paid database analysis
- Best of all....GET TO KNOW THEM!

Getting to know you...

- Introduce yourself and ask them to share their perspective on your organization. (If you're new, or even if you're not...)
- Call to thank. "If you don't mind, may I ask, what makes you so passionate about our work?" Then LISTEN and write down their responses.
- Confirm recognition preferences.
- Hand-deliver their thank you letter.
- Invite to lunch, small group events
- Invite them for "coffee date" to ask their advice.
- Invite them see a project or tour your organization.
- Let them know about a new success.
- Follow up on event invitations.

Getting personal

- \$1-99 prompt, accurate acknowledgement, bulk postage
- \$100 thank-you hand-signed by staff, same-day turnaround, first-class postage
- \$250 staff phones/emails to thank
- \$500 listing in Annual Report, invited to events
- \$1,000 board member phones to thank, leadership circle membership, special thank-you card signed by Executive Director, invited to small-group luncheon/tour, name on annual sign in lobby
- \$5,000 invited to private tour; assigned board donor partner
- \$10,000+ customized recognition; naming opportunities; ongoing personal touches by Executive and Board

Keeping it all straight

- Organized record keeping crucial!
- Track each “touch” – phone call, email, letter, visit, special event.
- Download what you learn ASAP after the contact.
- Track donor preferences and interests so you can tailor requests to them.
- Links with others associated with your organization.

Dealing with difficulties

- Make an agreement before you make a mistake
- Complaints are an opportunity to be of service: Listen, apologize, solve.
- Follow your True North: mission, ethics, integrity

Leadership Circles – Special recognition for generous people

- What's in a name?
 - Chairman's Circle
 - President's Club
 - Cornerstone Society
 - McCall Society
- Mission related; values personified
- Elegant way to refer to these donors
- Confers sense of belonging

A case in point

The Thomas Lamb Eliot Circle *TLC* for major donors



Helping Generous People Make the World a Better Place

What is TLC?



A way to recognize and build stronger relationships with leading donors in order to encourage loyal and increasing support.

Who was Thomas Lamb Eliot?

The Legend



Helping Generous People Make the World a Better Place

Who are TLC members?



Leading Oregonians
continuing a tradition of
compassion, pioneering spirit
and dedication to improving
the lives of animals in our
community.

Who are TLC members?



Individuals, families, donor advised funds & foundations donating \$1,000 or more annually to support the Oregon Humane Society.

Our corporate partners are also recognized as TLC businesses.

TLC Involvement

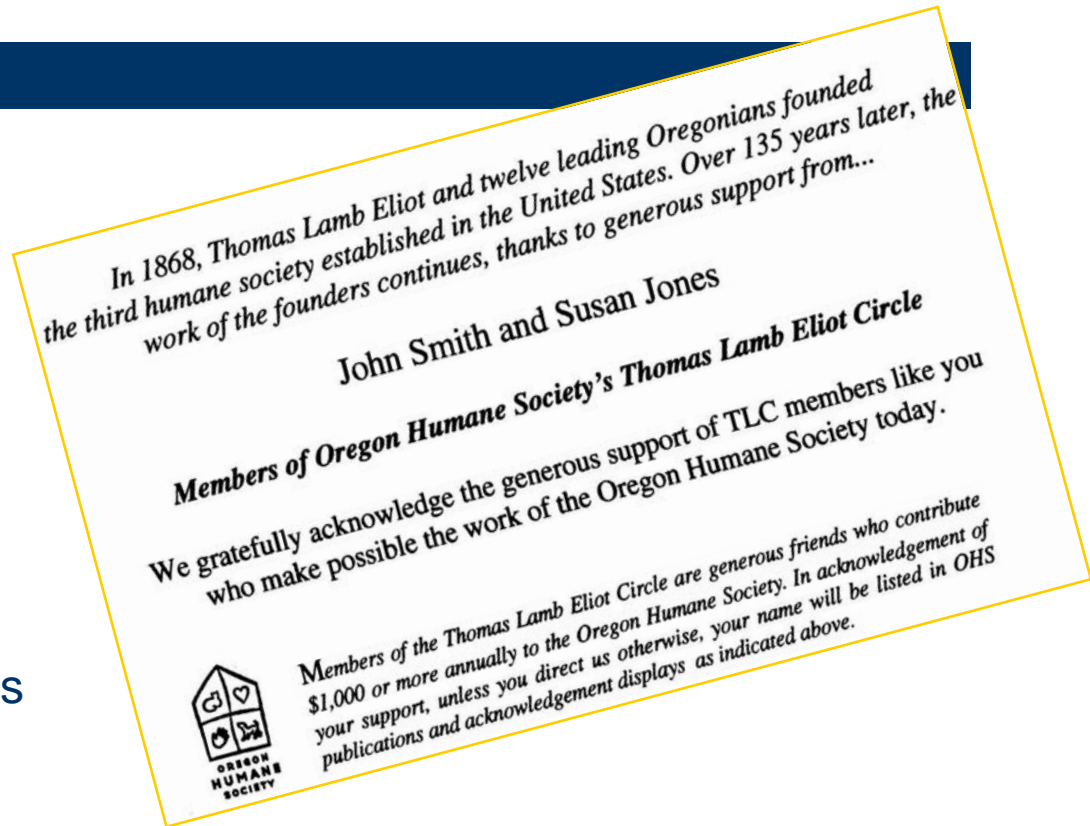
Invitations to Events

- Poster contest judging
- Special gatherings & house parties etc.
- Annual board-centered event

TLC Recognition

Deluxe thank-you package

- Welcome to TLC brochure and personalized card of thanks signed by Executive Director
- Board member phones to thank



TLC Recognition

Listings in publications

- All editions of the magazine for the year following the gift or pledge
- Annual report



TLC Recognition

In-shelter signage



2003

Oregon Humane Society's Thomas Lamb Eliot Circle

In 1868, Thomas Lamb Eliot and twelve leading Oregonians founded the third humane society established in the United States. "Must do something for horses here," Dr. Eliot recorded in his diary after witnessing a much-abused horse mired deep in the mud of Portland's downtown streets. The man one contemporary called "the wisest man I ever knew," found time among his many civic accomplishments to serve as OHS Board President for twenty-three years. This tradition of pioneering spirit, compassion and dedication continues today, with enormous assistance from leading Oregonians whom we honor as members of the Thomas Lamb Eliot Circle, in recognition of their contribution of at least \$1,000 annually to support the ongoing work of the Oregon Humane Society.

<p>GRETCHEN A. AHO MARC AKNER ALEX BENDERER SUSAN G. AMARA & GEOFFREY H. MURDOCH HEUNG B. & DEBRA MATTHEI RASHI L. AMEZAL III & JOHN J. HANCOCK DEAN L. & BETTY L. BAKER MICHAEL E. BRADSHAW HOLLY H. BARD THOMAS BARRETT HARRIS J. & VIRGINIA J. BRIGGS KURTIS BURE & REBECCA THOMPSON HARVEY & NANCY BLACK, JR. MICHAEL & DEBRA BRUCE ARNE E. & JOAN C. BRADSHAW CHRIS BRADSHAW & JAMES NAUM CAROL H. & WYNNE L. BRIDGE JULIAN R. BRUCE GERALD L. BRUCE HARRIET COPPINGER & ANITA L. PAGE JANET & RICH COOPER BARBARA E. COY-YOUNGER JOE R. & RUBY COOPER PAT A. COFFA & DEBRA A. BLANDA JOY A. DUBAR HELEN DE MARTINI ANNE & CHRISTINE DEGENS NICOLE DEGENS JIM M. & WENDI M. DESSMAN GEORGE K. & SONORA H. DRUMMOND DRUMMOND FAMILY FUND of The Oregon Community Foundation GARETH R. ENGLISH & CLARA HUBER ELIZABETH S. FALLENBERGER</p>	<p>RODNEY & CAROL FAUGHN JIFFREY FRANK & ANN WALL WILLIAM & JOYCE FURBER THOMAS C. GALLINGER, ESQ. ZONLEY F. & CLARE A. GALTUS SCOTT GLENNIE-HENCKS & MARK HENCK STEVEN L. & JACQUELIN H. GISH PENNY J. GOODIN BARBARA E. & BRUCE D. GOLDSON HEIDI GOODSON & MEL LEE DR. LINDA M. GOODSON TINA V. GRACE MARK K. GREENFIELD JOY E. GREENE ROBERT P. HALE KATHLEEN W. & FORREST J. HALL STEVEN & CINDY HANMER KIM HARBE SHARON HARMON & GARY KAH JILL & LAWRENCE R. HARTLEY HOWARD B. HIGHT JUANNA G. HIGGINS BETH HENDERSON FUND of The Oregon Community Foundation HELEN HERRON PETER & CINDY HOWMAN LAWRENCE K. HOGAN & TAMARA PELLETTE TAMARA HORNOLLETT JANICE L. HOOKER E. REBEA HOWLETT ROBERT HUBBARD JAMES M. HURD EDMUND PHEL & MARIAN JENSEN</p>	<p>TODD R. JONES GORDON H. & KIMBERLY KEENE MATTHEW H. KEENE CLARK H. & MARY JANE KILPATRICK DR. DEBRA R. KELLEN FRED LANGE DENISE LARSEN SCOTT A. LEE KATHA C. LINDEN & DAVID K. WITZGAER DR. HUBERT A. LEVINSKY DEBBIE & ROBERT LEVINSKY JOANNA LEVINSKY PAULA L. LEWIS GARY MANDROTTE JACK ALAN MANN DOUGLASS & DEIRDRE MARGLES TRIST FUND, GRANTOR FUNDATION OF THE SOUTHWEST WASHINGTON HEATHER MARIE MARK & LUCIA MARON ELIZABETH McMILLAN MARLENE RAY JONES & TODD McNEEL TOM McNEEL MARY L. & REX V. MELLARD MARA V. MITCHELL JANE & SCOTT MORRILL KONNETH J. & HOAN MORGLE DONALD J. & JEROME NELSON BETTY NOLAN CRAIG T. OLSON TOSKO POP & FLORENCE K. MATHIEN'S FUND - The Oregon Community Foundation JENNIFER W. & NANCY A. PATRICK</p>	<p>DONALD F. PEEZ JUDITH E. PEEZ RINE A. & DONALD F. PEEZ LINDA ANN PHELPS MRS. T.S. PETERSON WYNNE M. QUIMBY MARLENE REISING & DAVID STANHOPE CLAUDIA ROEMER FLORENCE E. ROOKS MICHAEL J. ROEGER CARL E. & JENNIFER R. RONDMEIER ALAN L. & KATHLEEN A. ROSE REINHOLD FUND FUND of The Oregon Community Foundation KAREN & MARK ROYCE DAVID H. ROYCE & RONALD W. VAN DONGEN JIM ROTHMAN ROBERT C. & TACY C. SUTTLER ALAN D. SMITH LAVY SMITH JACQUE SULLIVAN ERIC P. SULLIVAN & NICOLE BAKER SULLIVAN COLLEEN D. & ROBIN SORRENSEN JACQUE SULLIVAN JAMES D. ST. MARK DANIEL L. & SUZAN M. STEIN HONEY J. & LOUISE STREIBY CARL R. & BARRINA SWETT SULLIVAN TARDEN DEIRDRE D. & TERRY TAYLOR JOHN E. THORPE TAM & LEVIN THOMAS TINA M. THOMPSON MARGARET E. VAN HOUTEN</p>	<p>DOROTHY VITTA JEAN WILLIAM DEBRA WILGNER R. BURTIN & BARBARA WIGNER GLADYS WILSON MAIRA A. WILSON REINHOLD WITENSKO STANHOPE CLAUDIA ROEMER FLORENCE E. ROOKS MICHAEL J. ROEGER CARL E. & JENNIFER R. RONDMEIER ALAN L. & KATHLEEN A. ROSE REINHOLD FUND FUND of The Oregon Community Foundation KAREN & MARK ROYCE DAVID H. ROYCE & RONALD W. VAN DONGEN JIM ROTHMAN ROBERT C. & TACY C. SUTTLER ALAN D. SMITH LAVY SMITH JACQUE SULLIVAN ERIC P. SULLIVAN & NICOLE BAKER SULLIVAN COLLEEN D. & ROBIN SORRENSEN JACQUE SULLIVAN JAMES D. ST. MARK DANIEL L. & SUZAN M. STEIN HONEY J. & LOUISE STREIBY CARL R. & BARRINA SWETT SULLIVAN TARDEN DEIRDRE D. & TERRY TAYLOR JOHN E. THORPE TAM & LEVIN THOMAS TINA M. THOMPSON MARGARET E. VAN HOUTEN</p>
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TLC Recognition

Special
Greetings
Be Kind to
Animals Week
- First Week in
May



Week!
U.S. celebrates the unique bond between humans
and animals. This week has focused on the companionship, friendship,
and the debt humankind owes to all animals.

THANK YOU
from all of us at the **Oregon Humane Society**
for your personal commitment
to improving the lives of animals in our community,
this week and throughout the year.

TLC Involvement

Time with the Executive Director – **TLC Lunchtime at the Shelter**



***You are cordially invited** to join Executive Director Sharon Harmon for lunch and a behind-the-scenes tour to see your generosity at work. We'll be welcoming the newest TLC members and celebrating OHS's 142nd year of helping animals in need—please join us!*

*Oregon Humane Society
Ernest C. Swigert Animal Shelter
1067 NE Columbia Blvd., Portland
Thursday, November 11th, 2010
11:30 a.m. to 1:00 p.m.*

*RSVP - Mary Henry, TLC Donor Relations Manager,
(503) 416-7083 or maryh@oregonhumane.org*

Thank you for helping the animals so generously.

Helping Generous People Make the World a Better Place

TLC Involvement

TLC Speaker series



- intimate speaker events
- Interesting venues city-wide
- Mid-week, early evenings
- Send invitations to TLC members and prospects; encourage them to bring guests.
- Costs kept low through sponsorships
- Cultivate attendees who aren't yet TLC members

TLC Involvement



TLC Speaker Event Timeline

- 6:00 – wine and hors d'oeuvres
- 6:30 – Board Host calls event to order, thanks sponsor, intros ED
- 6:35 – ED provides insider update about OHS, intros featured speaker
- 7:00 – Speaker presentation
- 7:40 Q & A
- 8:00 Thank you and good night.

TLC Asks



Annual renewals

Mailed appeals

Events & follow-ups

Brochures - In the shelter &
available to distribute

Person to person

Dedicated Support – Donor Choice



- **Animal Care Fund**
- **Adoptions Fund**
- **Education & Outreach Fund**
- **Investigations & Rescue Fund**
- **Veterinary Care Fund**
- **Priority Projects**

Board Thank-You Calls



- **Increases donor loyalty & generosity**
- **Board members call to thank \$1000+**

Board Donor Partners



- **Personal connections with leading TLC members**
- **Monthly contact with 2-4 donors**
- **Staff provides ideas**

A Year in the Life - TLC

- December – First gift, receive a welcome package, board member phones to thank.
- January – Staff calls to confirm listing in annual report, mails invitation to new-member luncheon/tour with ED. Invited to board's major event.
- February – Invited to Poster Judging

A Year in the Life

- March – Annual Report mailed – their name appears. Spring appeal mailed. Invited to downtown speaker event w/national expert.
- April – Invited to TLC event – sneak peek at new outreach center near John's Landing.
- May – Be Kind to Animals Card, hand-signed.

A Year in the Life

- June – Summer magazine & Summer Appeal – customized gift cascades.
- July – (Gala every third year.)
- August – “Summer in the City” events - Pearl District, NW Portland.
- September – Fall Appeal. Speaker event in Lake Oswego or West Linn

A Year in the Life

- October – First renewal mailed. Speaker event downtown.
- November – Start hand-delivering thank-yous and holiday goodies. Speaker event – Eastside. Holiday appeal mailed.
- December – Board thank you calls. Holiday deliveries. Second renewal mailed.

Strategies (again)

- Get to know your top givers and their individual interests and values.
- Make sure they know you appreciate their contributions.
- Find ways to involve them in your work.
- Craft giving opportunities that appeal to their interests.

A few final thoughts

- Focus on the mission and the dollars will follow.
- Focus on success – people love it!
- Take good care of donors' money, and they'll give you more of it.
- “What do you want to accomplish with this gift?”
- Acknowledgement, Acknowledgement, Acknowledgement

Thank you to:

the collins group



The Northwest's Choice for
Fundraising Counsel

YOU for helping generous people make the
world a better place.

Contact me



Mary Henry

(503)416-7083

maryh@oregonhumane.org