

WVDO Advanced Skills Workshop

Raising Major Gifts and Deepening Donor Relationships During a Recession Friday, February 5, 2010

Registration, gathering, coffee/snacks		8:00
1. Getting Started	Aggie	8:30
<ul style="list-style-type: none">• Introductions and Survey Results• Giving trends and research on donor motivations		
2. Major Gift Program Basics	Liz	9:25
BREAK		
3. Beyond the Basics	Aggie/Liz	10:15
<ul style="list-style-type: none">• Are you the choreographer, main act, or supporting cast?• Donor-centered strategy development• Setting major gifts goals and managing expectations		
4. Q&A		11:30
Wrap Up and Send Off		11:55

Requirements for a Successful Major Gifts Program

For an organization to fully realize the potential of generating major gifts, its program must be as well-planned, organized and properly funded as any fundraising program or significant undertaking by the organization. Below is a list of the requirements for a successful program.

Board Leadership and Support: Board members and volunteers who are actively engaged in the mission of the organization can serve as effective advocates and fundraisers. Board commitment is evidenced by a resolution of support, 100% giving every year and participation in fundraising activities.

Top Staff Leadership: Because major gifts work requires strong relationship-building and personal meetings, the engagement of both staff and volunteers is critical. However, the Executive Director is in a unique position to convey respect to major donors and present the organization's plans, goals and needed resources to accomplish them. A staff lead must be responsible for the planning and implementation of a major gifts program, as well as coordination of staff and volunteers involved with the program.

Strategic Planning: Organizations with clear organizational plans give donors confidence that their investments will be used wisely. The more transparent an organization is about its goals and direction, the more donors will want to invest. Major gifts work relies on communicating these long-term plans.

Development Planning and Evaluation: A major gifts program should be just one piece of a fundraising plan that generates operating support and funding to advance initiatives set forth in the strategic plan. Every good plan also needs evaluation measures, to show how each fundraising program or activity is meeting goals and to track the return on investment.

Marketing and Communications: Every organization should have a clear vision, mission and case for support, as well as a comprehensive plan to communicate these consistently to key internal and external constituents. Together, they should motivate, inspire and encourage people to take action in support of the organization. Updated annually, the case for support for major gifts should focus on current initiatives that will compel donors to invest in the organization.

Donor Stewardship: Formal methods of thanking, recognizing, educating, informing and involving donors will instill donor loyalty and reap great rewards over the long run.

Staffing and Systems: Sufficient human and capital resources must be in place to support efficient and effective development programs and activities. Staff should be engaged in ongoing professional development activities that further develop their skills in prospect research, solicitation, planned giving, volunteer management and more. The fundraising database needs to allow for the dynamic capture and use of donor and prospect information.

Volunteer Involvement: Volunteer participation in fundraising will enhance success. Examples include briefing meetings, personal solicitation, event planning and thanking donors.

Training: Very few people are comfortable asking for money without ample training and support. Major gifts work requires that staff, counsel and volunteers receive regular training.

Investment over Time: For investments in major gifts, it typically takes three to five years to see the full return on investment. Major gifts programs are considered to be a low-cost fundraising program once fully implemented, but staff and counsel must understand that results are not immediate.

Major Gifts: Making it Happen Day-to-Day

Regular Meeting Schedule

Set up a regular meeting schedule with staff members and volunteers so that you can plan, evaluate and motivate others. Consider the following:

- A weekly meeting with development staff involved with major gifts work for quick planning and information sharing.
- A monthly meeting with the information and analysis manager or other manager for evaluation. Share consistent information, such as: gifts/pledges that have come in, solicitations where gifts are pending and significant moves made.
- Monthly meeting with the CEO and other lead staff members who will be helping with major gifts in a limited fashion.
- Check in with volunteers every two weeks. You may try a standing time once a month and then a check-in to see how things are going mid-month.
- Report consistent major gifts info/progress regularly to the board.

Get in the Habit of Using Your Database

Recording:

- Go into the database to record meeting outcomes and notes, and set up next moves immediately following meetings.
- Follow up with staff and volunteers who go on calls without you and do the same.
- Develop a call report that makes it easy for staff and volunteers to report back to you.
- Develop an “End of Week Checklist” to help you see what didn’t get done and where to pick up on Monday.

Reporting:

- Set up standing reports for your weekly and monthly meetings so that you can quickly prepare.

Get Out of the Office

Set goals for the number of donor meetings/tours you’ll conduct each week. Three a week means roughly 150 in a calendar year. You may discover that holding them on certain days of the week makes scheduling easier. If you e-mail or leave a voice mail when you’re trying to schedule, offer various times when you are available.

In the Meeting

- Think positively. Go into the meeting with the assumption that the donor will want to learn about the organization.
- Establish rapport in a business-like visit, not a one-way presentation.
- Have volunteers talk about why they are personally involved and share the excitement of the mission.
- Listen. Find out which parts of the case interest them – then probe further by asking *why*.
- Share the timeline, how other donors are involved and how the community has shown support.

Stewardship

Stewarding donors equates to future successes. Don't skimp on following up and going through the stewardship plan in an effort to move more solicitations forward.

Determine Any Tasks that Can Come Off Your Plate

Look for pieces of your work you can pass to other staff or volunteers.

Remember, Donors Give Through You, Not to You

Your job is to determine the best strategy for every donor. Determine who has influence with your donor, even if that means sending someone other than yourself out for the meeting.

PROSPECTIVE LEAD & MAJOR DONOR

GIFT PYRAMID

November 13, 2008

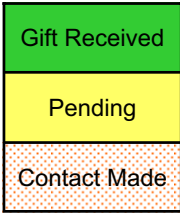
United Way of
Kitsap County



Goal: \$750,000

Total Raised: \$335,320

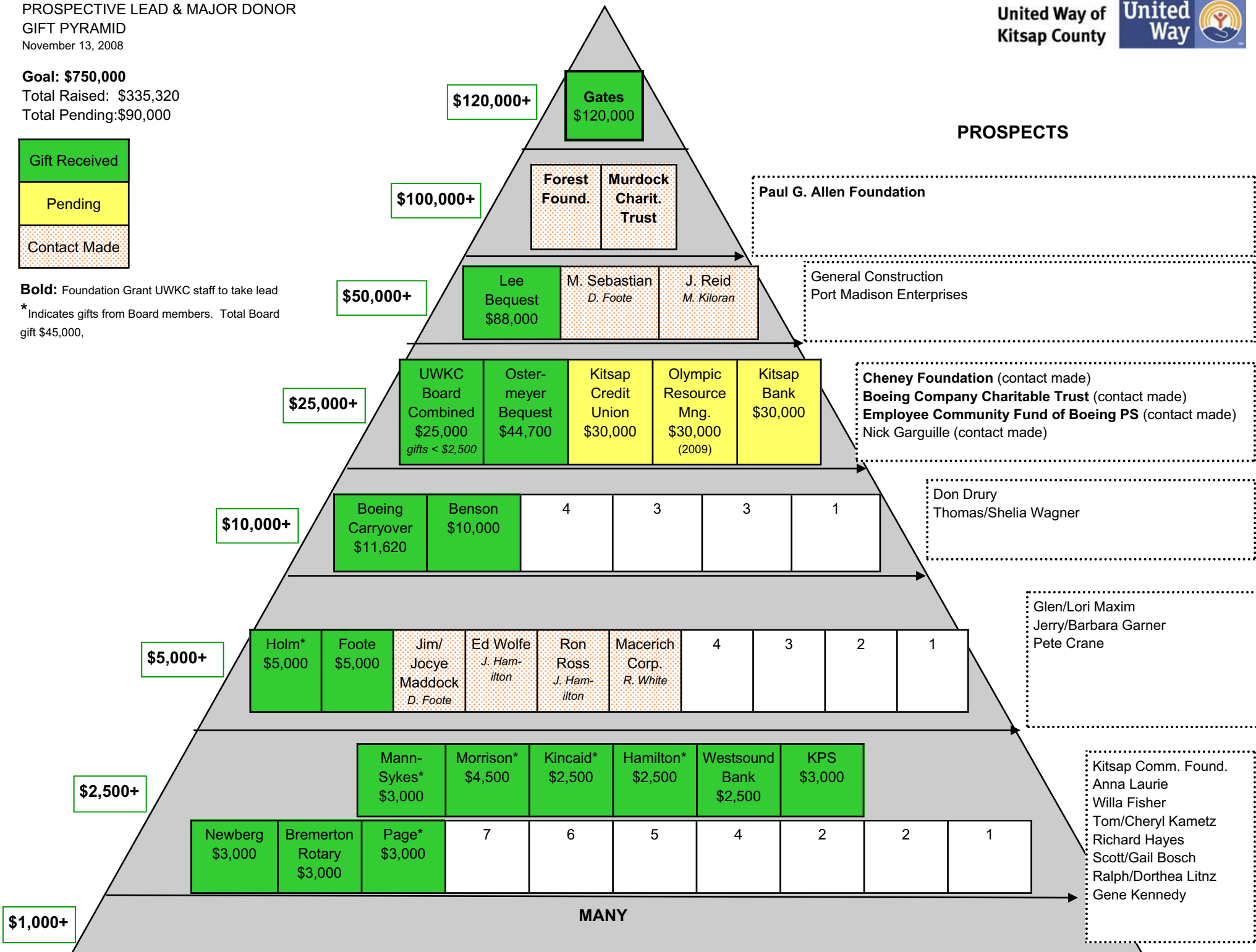
Total Pending: \$90,000



Bold: Foundation Grant UWKC staff to take lead

* Indicates gifts from Board members. Total Board gift \$45,000,

PROSPECTS





Name _____

Date _____

WAYS YOU CAN HELP THE LET'S BUILD CAMPAIGN

By virtue of the board's leadership role, and the board's unanimous vote to move forward with the capital campaign, **all board members** are expected to support the campaign in the following two ways:

- 1. **Be an advocate at all times for this project to everyone you meet.** Find opportunities to mention the campaign and its benefits. Keep promotional materials in a prominent place in your office, home, etc. Keep brochures in your bag just in case you have that elevator speech opportunity. You never know who you may be talking to, or what they could do for this campaign!

- 2. **Make a multi-year financial commitment that represents a stretch for you.** A stretch gift is one that requires some creativity to make possible. If the community perceives the board to have made token gifts, they will respond with their own token gifts; if they see stretch gifts, they will be inspired.

The rest of your involvement can be tailored to your own interests and skills. **We ask that each board member commit to participating in at least one activity in each of the following sections (I, II, and III, and IV).** Please volunteer for the activities that interest you by marking them with a checkmark. The development team will follow up with each of you to discuss the details.

I. Training/Prospecting

- 1. Get trained on how to cultivate donors, and how to ask for money. Training provides invaluable help on how to talk about the project even when you aren't asking for a gift.

- 2. Let the development team know about potential donors of any size. They will help you decide how, when, and how much to ask.

- 3. Join in and recruit others to help in prospecting sessions to review members and supporters. You will be amazed at how many "gold mines" are found this way.

- 4. Meet privately with long-time supporters to help identify other potential donors, and to consider donors that might be uniquely interested in different naming gifts.

II. Cultivating Donors



- __ 1. Invite prospects to tour the SE health center and learn more about the project.
- __ 2. Host a dinner party with potential donors, colleagues, friends, or family to tell them about the campaign and show them materials.
- __ 3. Once appropriate, invite prospects on a hard-hat tour of the new building. Hard-hat tours feel exclusive, and their ability to help people imagine all that the building will make possible can be very compelling.

III. Maximizing Your Gift

- __ 1. Join with other family members to take on a naming gift.
- __ 2. Put the organization in your will and encourage others to join you.
- __ 3. Take advantage of the recent extension in the Charitable IRA Rollover provision, or encourage family to do so. This provision exempts from taxable income any funds (under \$100,000) transferred from an IRA to a charitable organization. (Note donors must be age 70 ½ or over.)
- __ 4. Continually review your portfolio and consider gifts of appreciated assets. Gifts of stock will save you capital gains taxes while making a generous gift.
- __ 5. Meet with development staff to help figure out a creative way to stretch your campaign gift.

IV. Approaching the Community for Support

- __ 1. Ask your own employer or company to match or increase your gift. Even if they don't have policies, tell them about your support and ask them to consider matching it.
- __ 2. Solicit in-kind donations for the campaign: printing, travel, dinners, advertising, etc.
- __ 3. Join fellow board members, campaign committee members, or staff in a select number of visits to donor prospects. Even if you are not comfortable making “the ask,” your participation can be invaluable—because people respect you, because people take a meeting seriously when a board member is involved, because you have a story to tell about PPCW and/or this project that will inspire them.
- __ 4. Get PPCW on the agenda of as many community organizations as possible to tell our story. Help arrange presentations about the campaign to those who express interest.
- __ 5. Host an event and invite campaign prospects; help to make the pitch that evening and follow up afterwards.

MWA Major Gifts Program Metrics - Annually, Quarterly, Monthly

	Goal Annual	Actual FY 08-09	Q1 Goal Oct-Dec	Actual Q1	Q2 Goal Jan-Mar	Actual Q2	Q3 Goal Apr-Jun	Actual Q3	Q4 Goal Jul-Sept	Actual Q4
20% Dollar Goal (documented cash, pledges, deferred)	\$310,000		\$150,000	\$0	\$40,000	\$0	\$50,000	\$0	\$70,000	
25% Proposals submitted/Asks made of A/B prospects	45		15		10		10		10	
Norane responsible	30		10		7		7		6	
Tim responsible	15		5		3		3		4	
25% Significant moves; cultivation meetings and conversations	105		20		30		30		25	
A/B Prospects	45		5		15		15		10	
Norane responsible	30		3		10		10		7	
Tim responsible	15		2		5		5		3	
C Prospects	60		15		15		15		15	
Norane responsible	30		7		8		7		8	
Other staff/volunteers	30		8		7		8		7	
30% Qualitative										
5% Use and support of Tim, staff, and volunteers										
5% Internal support: Research & evaluation; use of database										
5% Quality of proposals/asks (consider gift size vs. request)										
5% Quality of moves										
5% Donor stewardship (policy in place and followed)										
5% Events (best use of, coordination, follow-up)										

*These are program goals, driven by the DD, but goals include dollars/proposals/moves made by others that the DD supports.

**Percentages of weight in each of these areas can serve as a point system for ongoing reviews.