

# CFNEG Nonprofit Academy

Fundraising Track

## Moving Up to Major & Planned Gift Fundraising

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# Ground Rules

- Ask Questions
- If you have to leave the room to make a call, answer an e-mail, or use the facilities -- go!
- Participate
- Be additive
- Have fun!

# Major Gifts Fundraising

“...a concentrated major gift fund raising effort typically extends over a period of years in order to raise specific revenue for operations, a major project, or ongoing programming needs.”

# Your Organizations

- Do You Have Major Gift Giving Clubs?
- Recount the history of the Major Gift programs
- What are the totals?

# Developing A Fundraising Plan is Sequential

- A Case for Support
- Draft a timeline
- Prepare gift chart
- Develop prospect list
- Conduct prospect research

# Sequential Fundraising

- Internally rate and evaluate each prospect
- Develop a dollar goal
- Draft job descriptions, with estimated time and money requirements for staff and volunteers
- Recruit committee chairs
- Recruit additional committee leadership

# Sequential Fundraising

- Establish regular meeting schedule
- Rate and evaluate each prospect, externally
- Add additional prospects
- Have case statement, pledge cards, and all campaign collateral materials available
- Assign possible named gift opportunities for top prospects
- Continue with *moves management* tracking reports
- Assign specific cultivation opportunities for top prospects

# Sequential Fundraising

- Develop individualized Plan A, B, & C for top prospects
- Conduct volunteer training
- **ASK!**
- Follow-up
- Continue ongoing communications program for volunteers, donors, and prospects
- Conduct broad-base/grass-roots solicitations, by telephone and by mail
- Recognize donors via “Club” events
- Celebrate and give thanks!

# The Five R's

Major Gift fundraising is different from Annual Fund efforts, in that it involves personal solicitation and requires:

The *Right* person,  
asking the *Right* prospect,  
at the *Right* time,  
for the *Right* amount,  
for the *Right* component

# Use the 4 “P”s to Organize Your Notes

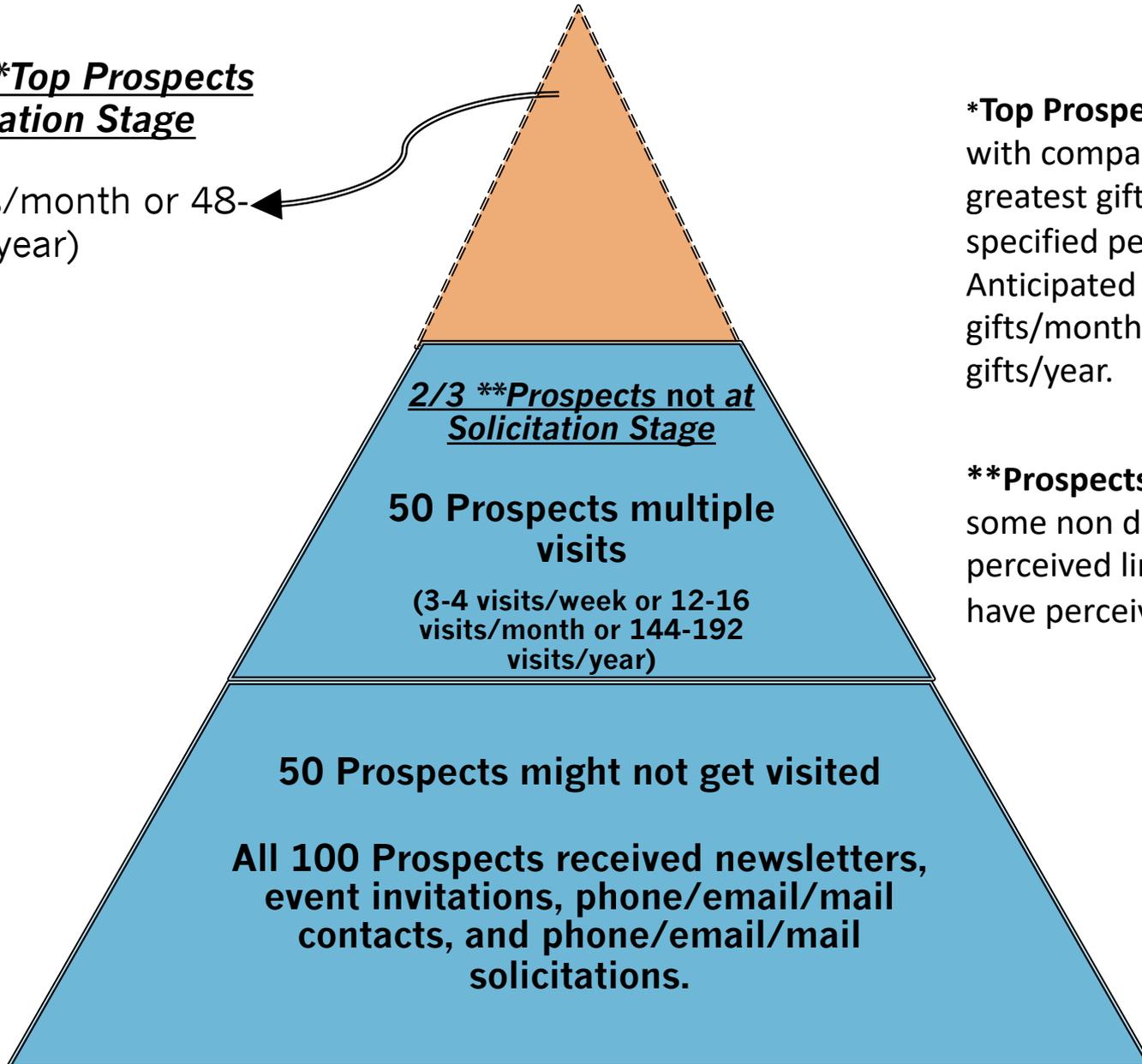
- **People** (family, friends, charities)
- **Properties** (assets: cost basis, FMV, income)
- **Planners** (minister, rabbi, CFP, CPA, attorney)
- **Plan** (life plan, estate plan)

# MAJOR GIFT METRICS

- Average of 6-7 exchanges to arrange an appointment
- Average of 25-33% of asks are funded

**1/3=50 \*Top Prospects  
at Solicitation Stage**

(4-6 asks/month or 48-72 asks/year)



**\*Top Prospects:** those with comparatively greatest gift potential in specified period of time. Anticipated results: 1-2 gifts/month or 12-24 gifts/year.

**\*\*Prospects:** donors and some non donors with perceived linkage who have perceived capacity

## **Focus on Gifts of \$1,000 and up**

*Perhaps the most important facts today—this slide & next slide*

*Per Association of Fundraising Professionals (AFP)*

**76% of gifts / 4% of donors / \$5,000 and up**

**89% of gifts / 14% of donors / \$1,000 and up**

**96% of gifts / 33% of donors / \$250 and up**

# Focus on 55-year-olds and up

2018 study by Brady Josephson (a digital marketing expert) showed:

- 🏛️ **45%** of all donors to all charities are age 65 or older
- 🏛️ **72%** of all donors to all charities are age 55 or older

# The Purpose

The purpose is always the same: to nudge a person from being a suspect, to being a prospect, to being a donor, to being a repeat donor.

# Moves Management

- Identification/Qualification (4)
- Cultivation (6)
- Solicitation (6)
- Stewardship (4)

# Communications for Major Gift Programs

- Case statement
- Web page
- Pledge cards
- Acknowledgments for gifts and pledges
- Stationery, envelopes and labels
- “Ways of Giving” brochure
- Campaign newsletter
- Volunteer instructions
- Form for assigning prospects
- Video/DVD

# A Few Types of Gifts

- *Long Term Appreciated, Marketable Stock*
- *Closely-held Stock*
- *Tangible Personal Property*
- *Gifts of Life Insurance*
- *Gifts from Donor Advised Funds*
- *In-Kind Gifts*

# Planned Giving

- Retirement Plan percentages

- Bequests in Wills:

Specific Asset or Specific Dollar Amount

Specific Percentage of Estate

Contingent Bequest (others predecease)

# 20 Questions to Ask Yourself

- Do you need money?
- Do you have a convincing case for support?
- Are your volunteer leaders reliable, visible, and ready to set an example?
- Is your staff of sufficient strength and experience to support a campaign?
- Do you have good access to funding sources?

# 20 Questions

- Are your funding sources knowledgeable about your case?
- Are you satisfied with your gift and pledge processing system?
- What is "the competition" up to? Are they planning campaigns?
- It costs money to raise money...can you afford those costs?
- Does your organization have clear priorities? How urgent are your priorities?

# 20 Questions

- How well have your fundraising efforts worked up until now?
- Is your organization well-known in the community?
- Does it have a positive image?
- How well does your organization work from a business perspective?
- Is it lean and efficient?
- Can you identify five to ten top volunteer leaders?

# 20 Questions

- Do you have an idea who your chairperson(s) ought to be?
- Do you think that person or persons will agree to lead?
- Can you identify five to ten top prospective donors?
- Can you identify two to three times the number of donors needed in each gift category?

# Why People Don't Give

*Studies have demonstrated that the most common reason for not giving is not being asked.*



*"Trust me, Mort—no electronic-communications superhighway, no matter how vast and sophisticated, will ever replace the art of the schmooze."*

