

Developing a Major Donor Campaign

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Who are we?

Why are we here?

Burning questions?

Screaming needs?



Give until it feels good

What makes your gift “major”?

“

Major gifts are

**contributions
that make a
significant
difference**

to the nonprofit organization to which they are given. The amount considered to be a major gift varies from organization to organization, depending on the organization's size, age, funding base, and operating budget. For a very small nonprofit, \$1,000 might be a major gift. For a large university, a major gift might be \$25,000 or more. ”

(Source: AFP.org)

Should we seek major gifts?

- **What's different?**
- **What's great?**
- **What's challenging?**

You have to have *plans*

- Strategic plan - the big picture
- Annual plan - this year's to-do list
- Revenue plan with major gift plan
- Case statement: the public plan

Our Revenue Plan

WHAT WE NEED:

Annual operating costs: \$110,000

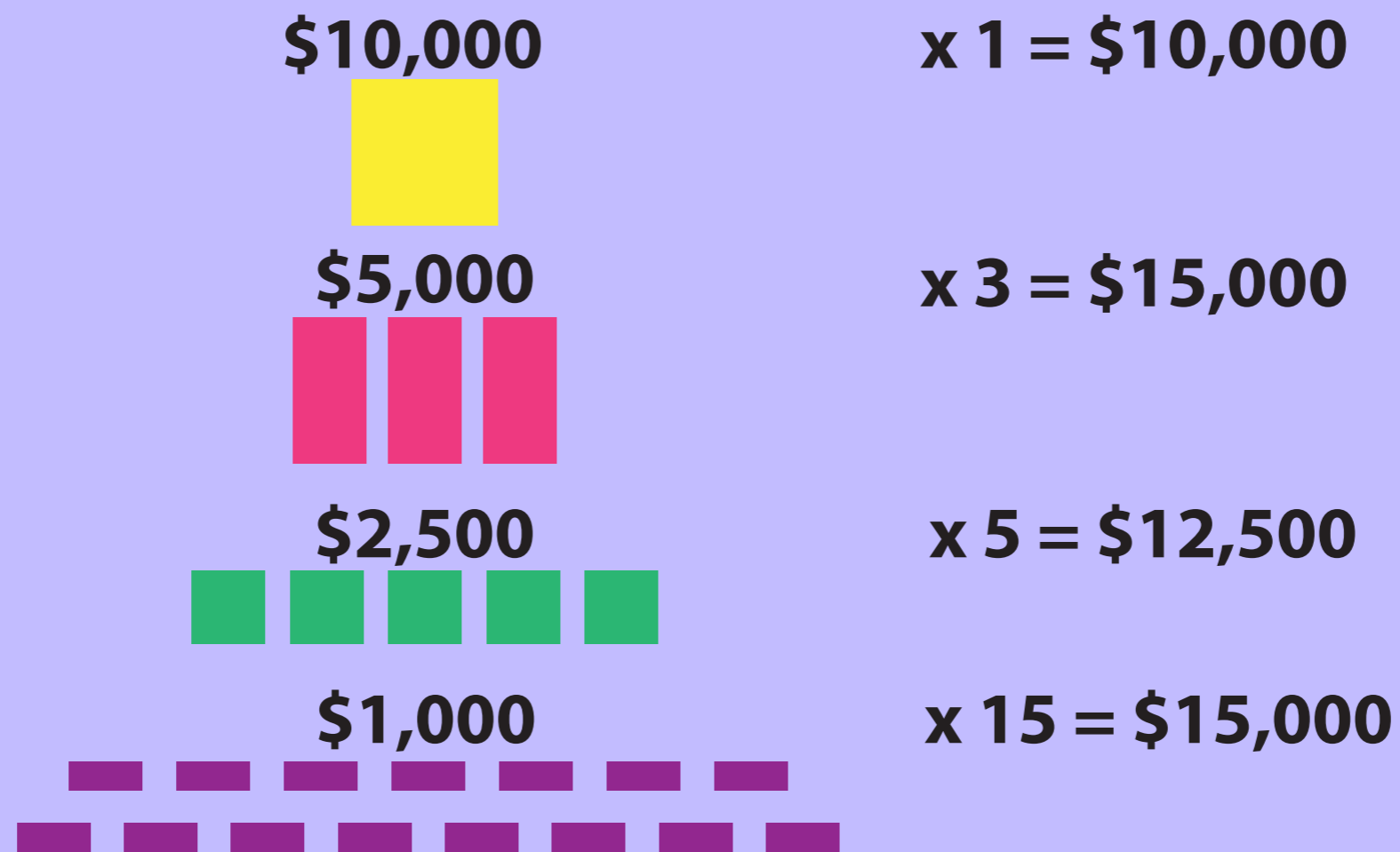
HOW WE WILL RAISE IT:



Why do you ask? The Case

- **The value of what you do**
- **Your institutional integrity**
- **Your vision of the future**
- **Your plan to achieve the vision**
- **The donor as your partner**

How many gifts will you need?



24 GIFTS = \$52,500

Major gift workplan

- 1. Check your readiness**
- 2. Organize the team and work**
- 3. Identify prospects**
- 4. Cultivate prospects**
- 5. Face to face asks**
- 6. Thank your donors!**
- 7. Measure, evaluate, improve**

I. Readiness

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20 Questions: What's Your Fundraising Potential?

	Strong	Okay	Weak
1. You have an inspirational vision of the community change you'd like to create.			
2. You can connect the resources you seek to the societal change you'd like to create.			
3. You have a strategic plan for least 3 years into the future.			
4. You cherish results and measure the impact of your programs.			
5. Your staff are passionate and evangelical leaders for your organization and its programs.			
6. Your board members are passionate and evangelical leaders for your organization and its programs.			
7. You are wise stewards of all of your resources.			
8. You have many long-standing friends and partners.			
9. You have created opportunities for people to be involved with you on many levels.			
10. You have clear goals.			

2. Organize

- One person in charge
- Solicitor assignment and preparation
- Tracking system for prospects, asks, gifts
- Debrief visits

3. Prospects

Who are your 100 best friends?

Identify at least **4 times** as many prospects as gifts needed.

Profile your prospects

CAUSE & EFFECT^{INC.} Tool for Change

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PROSPECT WORKSHEET

Date: _____

GIVING
TARGET:

Name: _____

Title: _____ Company: _____

Address: _____

City: _____ State: _____ Zip
Code: _____

Telephone: _____ Fax: _____ Email: _____

1. Who knows this person? How?

2. What is this individual's connection to your organization or project? What makes this person a good candidate for a meeting?

Find your connections

My Name: _____

Today's Date: _____

"WHO KNOWS WHOM?"

ID #	GROUP	I KNOW WELL!	I CAN ASK!	Prospective Save The Island Donors			Special Note	TARGET \$ ASK	GO HIGHER or LOWER!
12138	Fmr. Board			Ms.	Mary	Smithers		\$10,000	
3822	Land Partner			Mr. & Mrs.	Bill	Gates		\$100,000	
4065	Land Partner			Mr.	Ted	Turner		\$100,000	
3802	CE Abutter			Mr. and Mrs.	I.M.	aFarmer		\$5,000	
2188	Current Board			Mr.	Rand	Wentworth		\$5,000	
12863	CE Abutter			Mr. & Mrs.	Wendell	Berry		\$25,000	
12565	Current \$250+ donor			Ms.	Rachel	Carson		\$5,000	
12627	Lapsed \$250+ donor			Dr.	Sylvia	Earle		\$10,000	
13417	Lapsed \$250+ donor			Mr.	Warren	Buffet		\$50,000	
12716	Current \$250+ donor			Sen.	Sheldon	Whitehouse		\$1,000	

Instructions:

1. Print out the NAME, TITLE, and ADDRESS OF WHOM YOU KNOW.

4. Cultivation



A visit gets you 85% of the way to a gift

- Write to prepare prospect for your call (model on page 11)
- Call. Insist on a visit. Phone or mail are not adequate for this topic.
- Your commitment conveys the importance of the visit. Resolve barriers to visiting.
- Respect prospect's time. Meet her schedule.

Cultivation visit

- “Small talk” uncovers interests and connections
- I’m not here to ask for money today.
- I want to show you the exciting work we’re doing. (Site visits are ideal!)
- **Stop talking.** Listen, prompt, listen.
- When can we meet again?

Personal checklist

TOOLS FOR CHANGESM

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WWW

RATE YOURSELF IN EACH CATEGORY

SOLICITATION SELF-ASSESSMENT

I. PREPARATION

1= Didn't do it 2= didn't prepare enough 3= I was well prepared

1. I made my own leadership gift first
2. I understood the campaign goals and the reason for requesting the gift
3. I understood the importance of the amount targeted
4. I believed that this gift really could make a difference
5. I knew the past giving history and relationship of the prospect
6. I had an understanding of areas of interest to the prospect
7. I knew that this prospect was

II. THE

5. Asking for money

- This time, you are here to talk about a gift.
- Stress results, benefits, outcomes and urgency of the gift.
- Describe donor benefits: recognition, pride, personal interests (e.g. fishing).
- “I would like you to consider a gift of....”
- **Stop talking.** Don't speak first.

Four magic questions when they don't say "yes"

- **Is it a problem with our organization?**
- **Is it the work that we do?**
- **Is it the amount I asked for?**
- **Is it the timing?**

“Feel, felt, found”

Responding to objections

- **I understand how you feel.**
- **I’ve felt that way myself.**
- **And here’s what I’ve found.**
(The solution.)

A few solutions

- **Spread over 2, 3 or 5 years?**
- **Pledge with conditions?**
- **Planned gift or bequest?**

6. “Thank you”

- **Within hours, and up to 7 times in total**
- **Include letter for tax purposes**
- ***Don't stop!* Steward your donor to the next gift**

7. Evaluate

- **Track performance against plan**
- **Individual and group results**
- **Weekly snapshot**
- **Share results, get help, keep moving**
- **Analyze, experiment, improve**
- **Write down what you learn**

SNAPSHOT	
GOAL	\$750,000.00
PAID	\$475,000.00
PLEDGED	\$135,000.00
Total	\$610,000.00
BAL to RAISE	\$140,000.00
% Raised	81.33%
as of	3/27/2010

Monitoring: Campaign Snapshot

The Details ... As of 3/27/10										
Gift Range	GOALS		PAID		PLEDGED		TOTAL		BAL to RAIS	
	\$	#	\$	#	\$	#	\$	#	\$	#
\$100,000	\$100,000	1	\$100,000	1	\$0	0	\$100,000	1	\$0	0
\$50,000	\$100,000	2	\$50,000	1	\$50,000	1	\$100,000	2	\$0	0
\$25,000	\$125,000	5	\$75,000	3	\$25,000	1	\$100,000	4	\$25,000	1
\$20,000	\$160,000	8	\$100,000	5	\$20,000	1	\$120,000	6	\$40,000	2
\$10,000	\$100,000	10	\$70,000	7	\$10,000	1	\$80,000	8	\$20,000	2
\$5,000	\$75,000	15	\$50,000	10	\$5,000	1	\$55,000	11	\$20,000	4
\$2,500	\$50,000	20	\$10,000	4	\$20,000	8	\$30,000	12	\$20,000	8
\$1,000	\$40,000	40	\$20,000	20	\$5,000	5	\$25,000	25	\$15,000	15
GRAND TOTAL	\$750,000	101	\$475,000	51	\$135,000	18	\$610,000	69	\$140,000	32

Learn more



On the web:

RI Land and Water Partnership

<http://www.landandwaterpartnership.org>

The Land Trust Alliance

<http://www.landtrustalliance.org/resources>

Association of Fundraising Professionals RI 2010 Fundraising Conference May 20

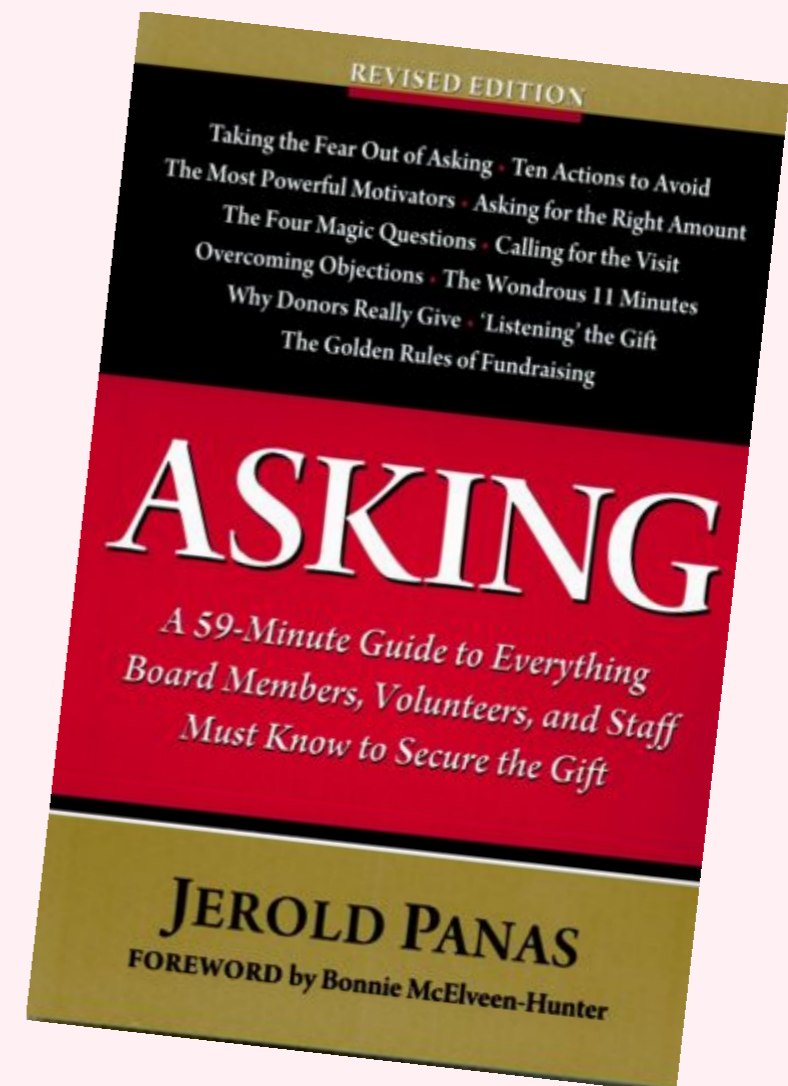
Featuring Anne Garnett on Events!

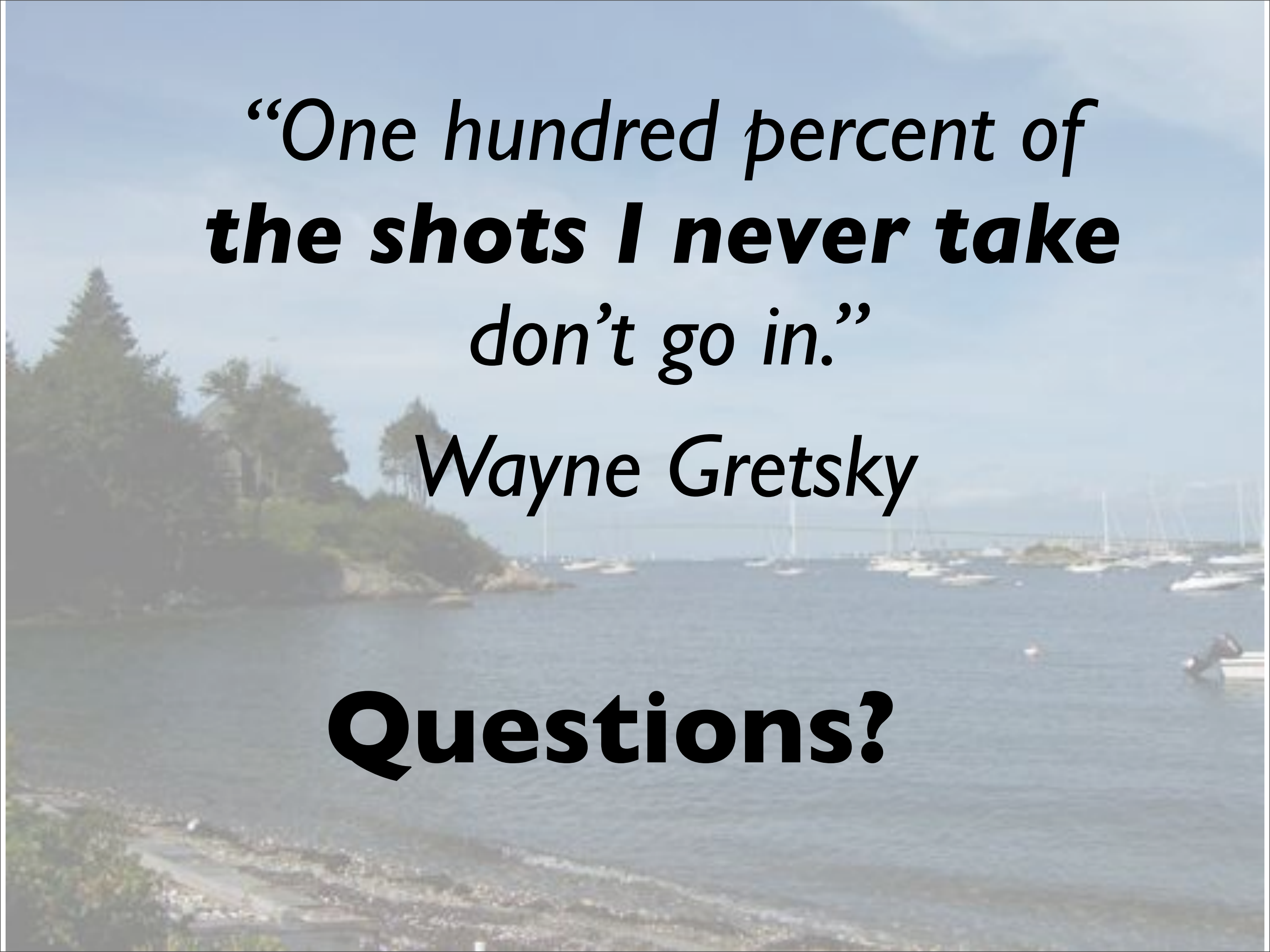
<http://afpri-conference.webs.com>

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<http://www.ceffect.com>

One great book on face-to-face solicitation:





*“One hundred percent of
the shots I never take
don’t go in.”*

Wayne Gretsky

Questions?