MOBILIZING YOUR BOARD
FOR MAJOR GIFT FUNDRAISING

AFP | Colorado Chapter
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Objectives of the Session

- Build capacity for major gift fundraising success
- Prepare for major gift outreach
- Learn the “The Secret Sauce” to major gift fundraising

Stats & Other Stuff
Median major gift is reported at $5,000.

Median of 20 major donors in giving portfolio, with 2 staff working on major gifts.

$17 billion (5%) of $335 billion given in 2013 came from gifts of $1 million or more.

- 146 major gifts for $5-10MM budget
- 43 major gifts for $1-$4.9MM budget
- 25 major gifts for <$1MM

DD’s and Major Gift Officers raised an additional $37K with added training.

Averaged 6 new major gifts for each additional year with the organization.

“To raise bigger gifts, small charities need to pay more attention to quality, not quantity ...”

“Nonprofits should be more selective in deciding which prospective donors to pursue and take better care of the supporters they already have ...”
It’s hard to ask for major gifts

Fundraising will hurt my reputation

I’m not good at fundraising
It’s the staff’s job
to raise major gifts

Critical Success Factors
1. Compelling Case for Support
2. Viable Fundraising Plan
3. Vetted Prospect Pool
4. Trained & Equipped “Askers”
5. Meaningful Solicitations
6. Strong Donor Relations
7. High Standard for Gift Stewardship

Role of the Board
1. Give a gift (100% participation)
2. Help identify prospects
3. Help ask for major gifts
4. Say thanks
5. Celebrate success
Role of the Staff

1. Create the Major Gift Plan
2. Prepare major gift outreach tools
3. Identify and research prospects
4. Help ask for major gifts
5. Track and report outcomes
6. Say thanks 7 times
7. Maintain strong donor relations
8. Be good stewards of gifts

10 Easy Steps to Making
A Major Gift “Ask”
Together

1. Learn about the prospect
2. Identify the ASK Team

3. Prepare the script
   (decide who is saying what; who will ask)

4. Set the appointment
5. Walk through the Case (talking tool)

6. Stage the ASK
   - Table of Gifts
   - Progress to Date
   - Donors to Date
   - Recognition Opportunities
   - Giving Options

7. Make the ASK
   Respectfully ask them to consider:
   A gift that is significant to them, or
   A specific amount | specific project
8. Wrap up the ASK

Do they need more info
When is a good time to follow-up
Provide contact info

9. After the ASK

Send visit thanks in 24 hours
Follow up as promised
Get gift commitment in writing
Send multiple gift thanks
Report the outcomes

10. Mobilize the Donor Relations Plan
Other Hot Tips For Major Gift Success

Find the “Sweet Spot”

Focus on five at a time
Work as a team

Move with the movers

Common Major Gift Mistakes
Not asking

Rushing the process

Sloppy or prolonged follow up
It's The Little Things

What Board Members Aren't Telling You But Wish Staff Would “Get”

- I don’t want to give you my address book
- I don’t want to do your job for you
- I don’t have endless $ for you
- I don’t want to be around you if you’re sick

It’s The Little Things

What Staff Members Aren’t Telling You But Wish The Board Would “Get”
It's The Little Things

- Don’t expect me to have a personal relationship with all of Denver’s big donors
- Don’t expect me to walk into a donor’s office and walk out with a bag of gold

An Overview of Fundraising Ethics

The “Secret Sauce”
Q & A

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