

Roecker Consulting Group LLC

MOBILIZING YOUR BOARD FOR MAJOR GIFT FUNDRAISING

AFP | Colorado Chapter
February 19, 2016

Roecker Consulting Group LLC

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

Roecker Consulting Group LLC

Stats & Other Stuff

Roecker Consulting Group LLC

From Advancing Philanthropy | Winter 2016

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.

Roecker Consulting Group LLC

From Chronicle of Philanthropy | January 2016

- 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.

Roecker Consulting Group LLC

From Chronicle of Philanthropy | January 2016

“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 ...”

Roecker Consulting Group LLC

What Is Major Gift Fundraising

Roecker Consulting Group LLC

What's New | What's Not

Roecker Consulting Group LLC

What's Not True But Feels True to Board Members

Roecker Consulting Group LLC

It's hard to ask for major gifts

Roecker Consulting Group LLC

**Fundraising will hurt
my reputation**

Roecker Consulting Group LLC

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

Roecker Consulting Group LLC

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

Roecker Consulting Group LLC

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

Roecker Consulting Group LLC

1. Learn about the prospect

Roecker Consulting Group LLC

2. Identify the ASK Team

Roecker Consulting Group LLC

3. Prepare the script

**(decide who is saying what;
who will ask)**

Roecker Consulting Group LLC

4. Set the appointment

Roecker Consulting Group LLC

5. Walk through the Case (talking tool)

Roecker Consulting Group LLC

6. Stage the ASK

Table of Gifts
Progress to Date
Donors to Date
Recognition Opportunities
Giving Options

Roecker Consulting Group LLC

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

Roecker Consulting Group LLC

Other Hot Tips For Major Gift Success

Roecker Consulting Group LLC

Find the “Sweet Spot”

Roecker Consulting Group LLC

Focus on five at a time

Roecker Consulting Group LLC

Work as a team

Roecker Consulting Group LLC

Move with the movers

Roecker Consulting Group LLC

Common Major Gift Mistakes

Roecker Consulting Group LLC

Not asking

Roecker Consulting Group LLC

Rushing the process

Roecker Consulting Group LLC

**Sloppy or prolonged
follow up**

Roecker Consulting Group LLC

It's The Little Things

**What Board Members
Aren't Telling You
But Wish Staff Would "Get"**

Roecker Consulting Group LLC

It's The Little Things

- 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

Roecker Consulting Group LLC

It's The Little Things

**What Staff Members
Aren't Telling You
But Wish The Board
Would "Get"**

Roecker Consulting Group LLC

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

Roecker Consulting Group LLC

**An Overview of
Fundraising Ethics**

Roecker Consulting Group LLC

The "Secret Sauce"

Roecker Consulting Group LLC

Q & A

Roecker Consulting Group LLC

Contact Info

Ann Roecker, CFRE

President

303 322 3020

ann@roeckerconsulting.com

www.roeckerconsulting.com

Copyright 2016 Roecker Consulting Group, LLC