



Getting Major Gifts

with Stephanie Roth

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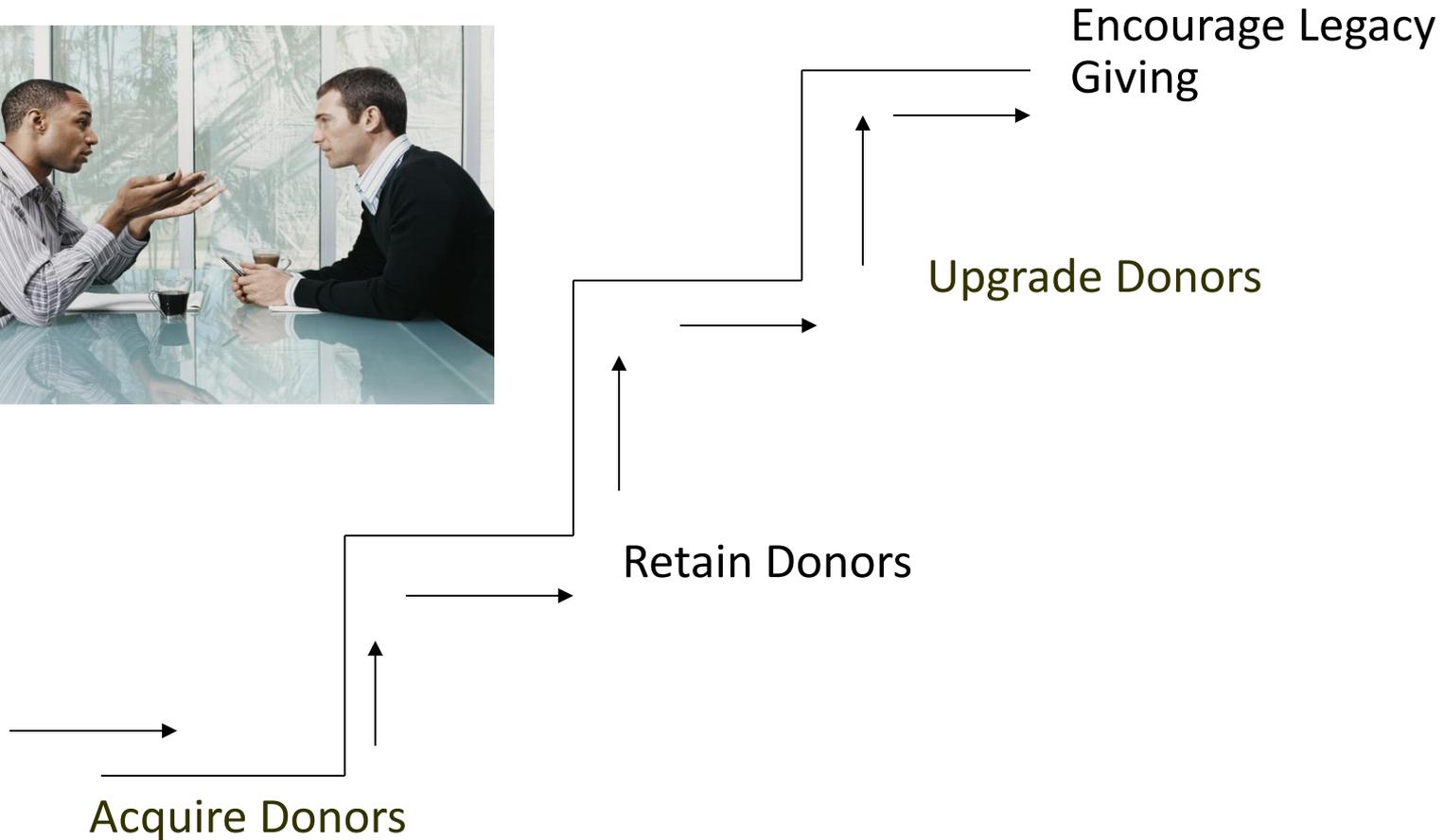
Workshop Goals

- Increase skill & comfort in asking for money, including for major gifts
- Learn how to identify the best prospects for major gifts
- Discover ways to build a stronger fundraising team
- Learn how to conduct a major gifts campaign

What is a Major Gift?

- A gift that is a stretch gift for most of your supporters (usually at least \$250, sometimes \$500 or more)
- Consider long time donors, whose annual gift may be less than \$250, but have been giving for 5-10 years or more.

Remember: The Purpose of Fundraising is to Build Relationships



Donors are on a trajectory

“This is one of the organizations I support”

“I like this organization a lot (and might want to get more involved in the work)”

“This is one of my top giving priorities”



Ways to Ask (for Money)

*More
personal &
higher
response rate*



*Less personal
& lower
response rate*

In person asking
Personal Phone Call
Personal Letter or email
Phone bank
Direct Mail
Mass Email
Texting (including text
to give)
Social Media
Special Events

Major Gifts: The Big Picture

Your organization
needs:

Donors Provide:

Annual	←	Income
Capital	←	Assets
Endowment	←	Estate



*Talking about
Money:
The Great Taboo*



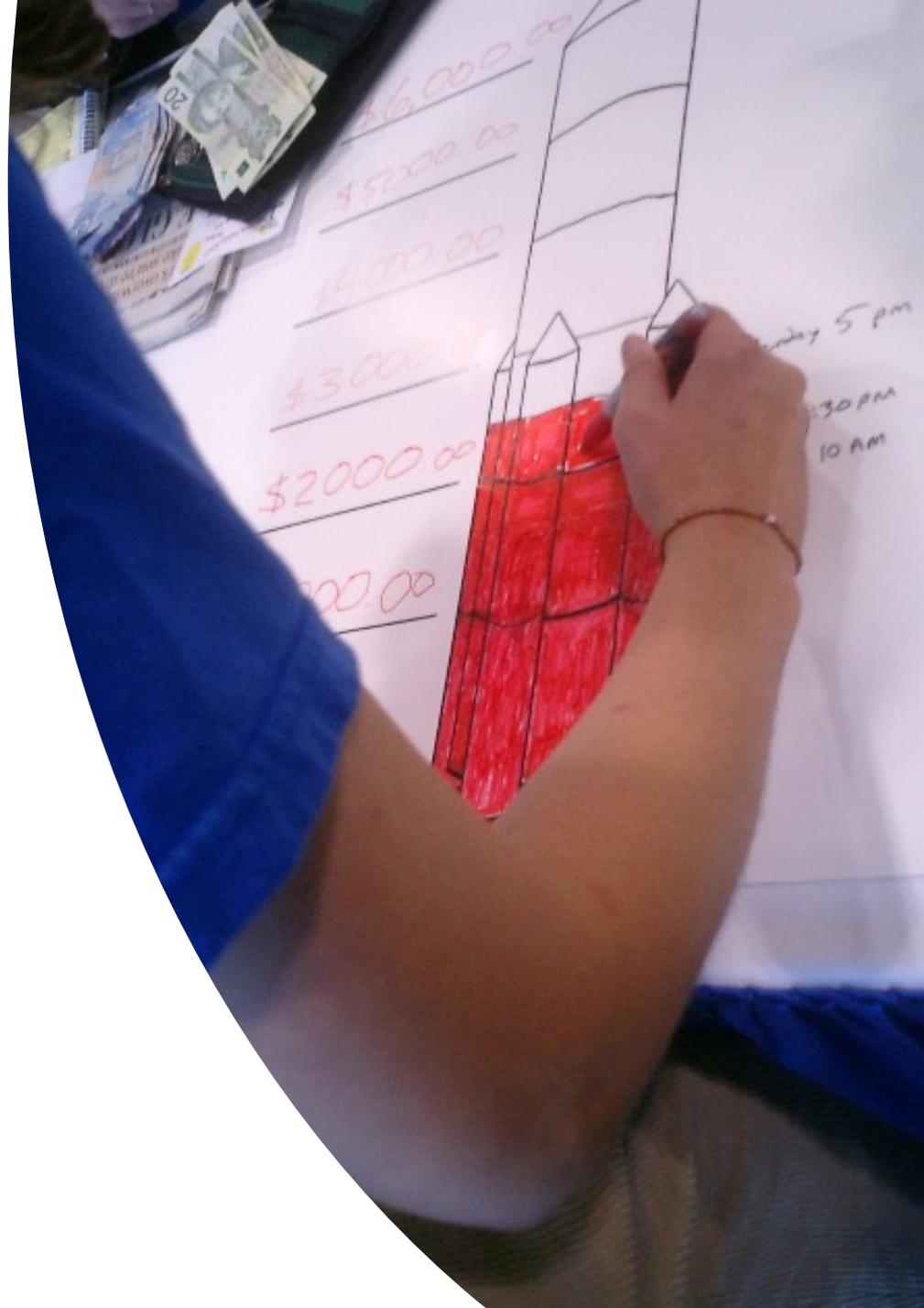
Exercise (in breakouts):

- What is your earliest memory of money?
- What did you learn about money (and what were the main messages you got) from your family, peers, the media, other institutions?

Three Tips for Successful Asking

1. Success is Asking

Tip? Track the number of ASKS made, not just how much money you raise.



Three Tips, Cont.

2. Be OK with NO



Three Tips, cont.

3. Your belief in your cause should be greater than your fear





Asking for Large Gifts



Who are Prospects for Major Gifts?

Criteria for major donor prospects*



*Ability, Belief, Contact

Prospect Identification Exercise

Name of potential donor	Contact = What is your relationship to them?	Belief = Believes in your group's cause?	Ability = Has given money to an organization before?	How much to ask for and by what method?



Steps in Asking



Making the Case for a Meeting

- You'd like to speak with them about an exciting new initiative
- You want to get their feedback on something about your work
- You want to get to know the people who care about your organization better

Gifts needed for \$50,000 goal

# of gifts	size	# of prospects	Total
2	\$5,000	8	10,000
3	2,500	12	7,500
8	1,000	24	8,000
14	500	28	7,000
40	250	80	10,000
75	100	150	7,500
<hr/>			
Total: 142		302	50,000

How to decide how much to ask for

- Start with Gift Range Chart
- Look at prospect's relationship with organization -
 - Is this their first gift? 4th? 20th?
- Who is going to do the asking?
 - Close friend? Friend of friend?
- **It's best to name a specific amount.**
- If you really can't decide on amount, pick a range.



Sample Letter or Email:

Dear Ms. Peters,

You have been a generous donor to our work to protect open spaces in “Name of region” over the past several years. We greatly appreciate your ongoing support.

As you may know from reading our newsletter, we are embarking on a new project to protect an important piece of land from development. The plans are exciting but also ambitious and we’re reaching out to folks like you who understand the needs of our community to ask for a special gift at this time.

Would you have time to get together on the phone, by zoom, or even in person for a safe-distance visit of 20-30 minutes in the next couple of weeks – either after work one evening or during the day if your schedule permits?

We need to raise \$50,000 this fall, and I’m hoping you’ll consider a donation of \$2,500 towards the goal. Because this is an increase from your past donations, I would like to have a chance to speak with you about it and answer any questions you may have.

Let me know what days and times are best for you and if it’s easier to schedule by phone, call me at 321-123-4567 or send me your number and I’ll give you a call.

Thanks so much for considering this request.

Eva Martinez, Board member

Prepare for the Meeting

Have ready:

- Core values and/or big picture
- Stories showing impact of your work
- Data about extent of the problem or need
- Questions you want to ask donor/prospect
- Budget and fundraising success so far

Don't do all the talking

Ask different types of questions:

- How did you first hear about us?
- What is your relationship to this issue?
- What most interests you about our programs?
- What are you most concerned about?
- What do you think we should do about...?



The CLOSE



Building a Fundraising Team

Start with Board & Staff Members



Who else can you recruit to your fundraising team?

- Current donors
- Recently retired people
- Former staff and/or board members
- Program participants





from Executive Director, Board Chair
& Fundraising Committee Chair

www.kleinandroth.com

Provide Support to Team Members

Training



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graph TD; A[Training] --> B[Materials (eg, sample letters, talking points)]; B --> C[Buddy system & follow up with team members]; C --> D[Team check-ins]; D --> E[Appreciation of efforts made];
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Materials (eg, sample letters, talking points)

Buddy system & follow up with team members

Team check-ins

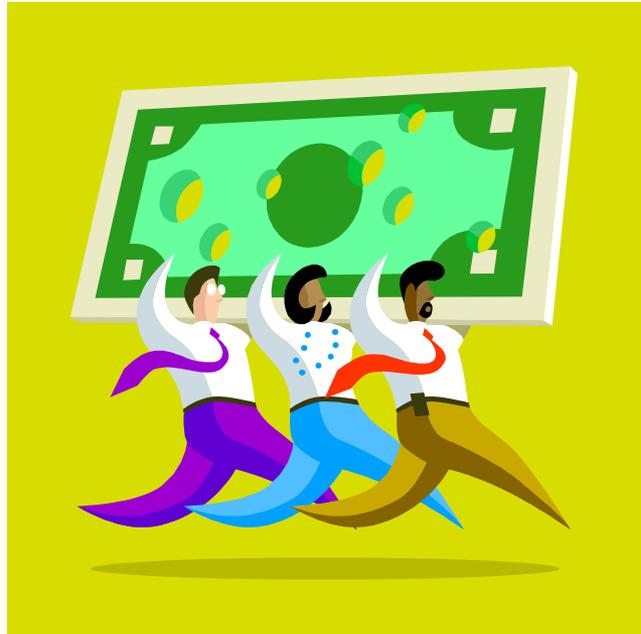
Appreciation of efforts made

Involving Fundraising Team in Major Donor Program



- ✓ Assign up to 10 donors to each of your fundraising team members
- ✓ Make matches based on relationships & organizational roles
- ✓ Each team member solicits their donors once or twice a year and sends a thank-you note
- ✓ Reach out at least once in between solicitations with update or question

Conducting a Major Gifts Campaign



Steps for a Major Gifts Campaign

1. Set goals
2. Prepare campaign materials
3. Recruit team
4. Identify prospects
5. Conduct orientation and training for team
6. Launch campaign
7. Coordinate campaign, following up regularly with team members
8. Celebrate end of campaign
9. Evaluate



Where to find me



Stephanie Roth

stephanie@kleinandroth.com

510-821-1514

www.kleinandroth.com