



# Getting Major Gifts

with Stephanie Roth

September 9, 2021

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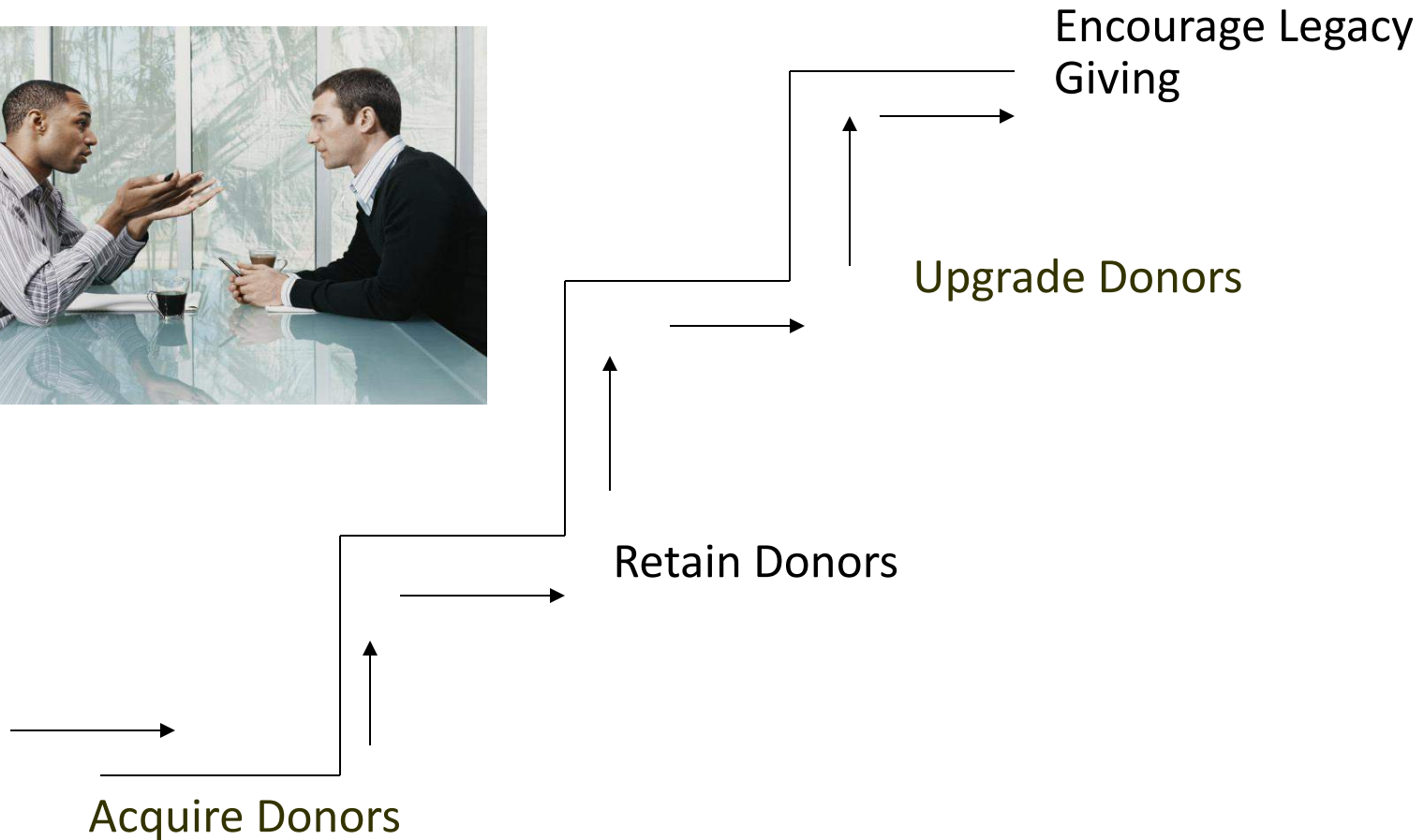
# Workshop Goals

- 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):**

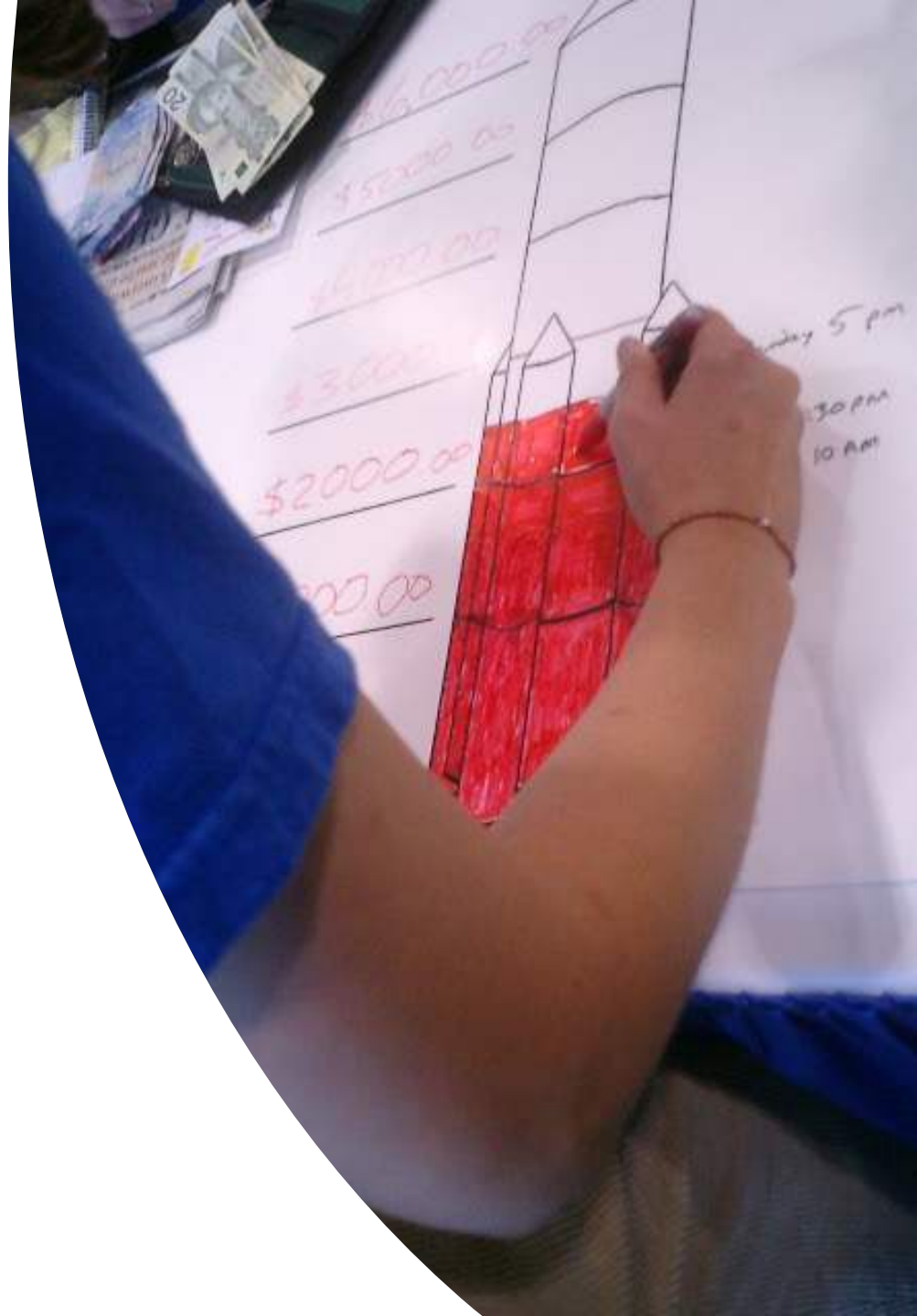
- What is your earliest memory of money?
- What did you learn about money (and what were the main messages you got) from your family, peers, the media, other institutions?

# Three Tips for Successful Asking

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## 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.

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







## Asking for Large Gifts



# Who are Prospects for Major Gifts?

[www.kleinandroth.com](http://www.kleinandroth.com)

# Criteria for major donor prospects\*

\*Ability, Belief, Contact



# Prospect Identification Exercise

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



# Steps in Asking

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# 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
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? 4<sup>th</sup>? 20<sup>th</sup>?
- 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

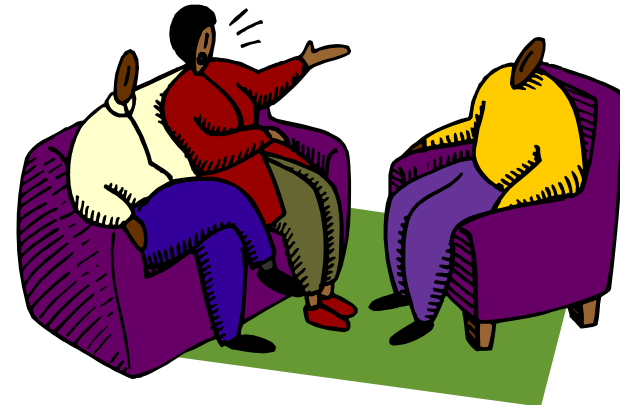
Have ready:

- 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](http://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

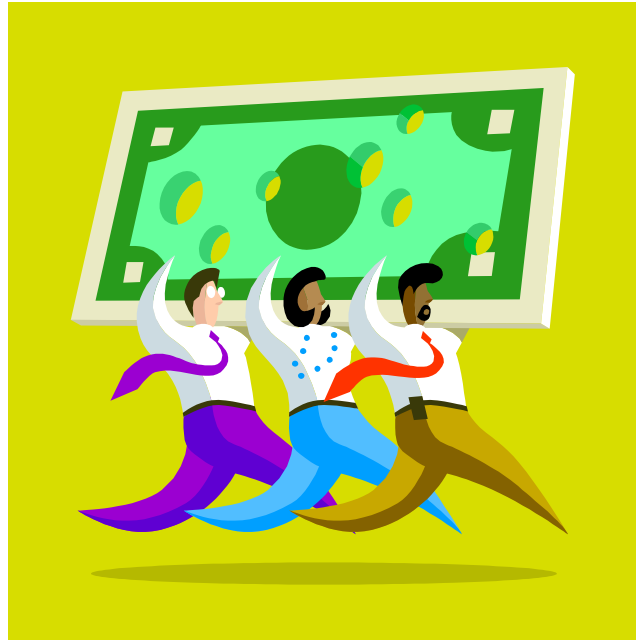
Appreciation of efforts made

# 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](mailto:stephanie@kleinandroth.com)

510-821-1514

[www.kleinandroth.com](http://www.kleinandroth.com)