



Building a Major Donor Program from the Ground Up

Hello!

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Who are you?



Overview

1. Major Donor Level
2. Donor Rating
3. Finding New Donors
4. Engaging Your Board
5. Donor Cultivation
6. Donor Stewardship
7. Setting Goals
8. Measuring Success
9. First Meeting
10. How Much to Ask For
11. The Ask Meeting Agenda
12. The Ask



“You Can Do This!”

Raising major gifts is within reach!

The great thing about major gifts is you don't need a hundred donors to make a real difference... *you only need a handful.*





Size
Matters!



Size Matters!

There are three important reasons:

Donor Recognition

- Board phone calls
- Handwritten notes from the ED
- Special property walks
- Advance ticket sales
- VIP treatment

Time Management

- If it makes sense for you to visit a \$1,000 donor, then that's a major gift for your organization
- We would love to visit every donor but most of us are in small shops and our time is constrained. Setting a major donor level helps us manage that time.

Accountability

- For accountability and tracking metrics. If your major gift levels start at \$5,000, then you will be able to easily track how many \$5,000+ gifts you received this year.



How big is a Major Gift to you?

- Each organization has a unique major gift level for them.
- Major gifts aren't just for Capital Campaigns.
- Major gifts will infuse your annual fund.



What is right for you?

Run a list of top donors

- Run a list of your top donors for the last 12 months.
- Exclude any foundations or corporations.
- Exclude any extreme outliers or one-time gifts.

Average your top donors

- Take an average
- Round up
- Remember there are no hard rules.
- What feels right for your organization?
- Be realistic, yet optimistic

Let's say that last year you had 1,200 donors. Of those, 130 gave \$500 and above.

Once you take out project gifts, sponsorships, your most major donors (since that may skew the amount – and they should already be in your portfolio) and grants – you are left with 110 gifts and a total of \$235,000.

$$\$235,000 / 110 = \$2,136$$

Rounded up – your major gift starting level is \$2,500



Major Donor Prospects

- It's better to focus on a handful of well qualified donors than a longer list of "maybe's."



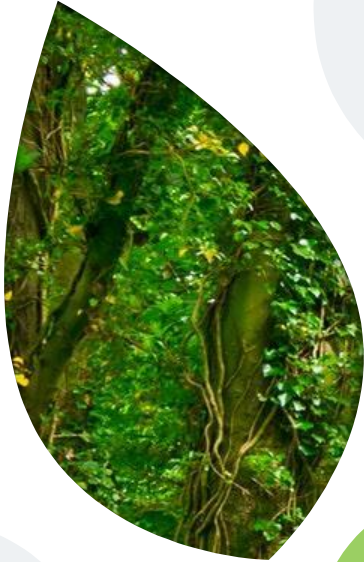
How to Identify Prospective Major Gift Donors

Your largest donors

Run a report to identify who gave the most, cumulatively, over the last twelve to twenty-four months.

Your most loyal donors

Run a second list of donors who have given at least 4 out of the last 5 years (or 8 out of 10).

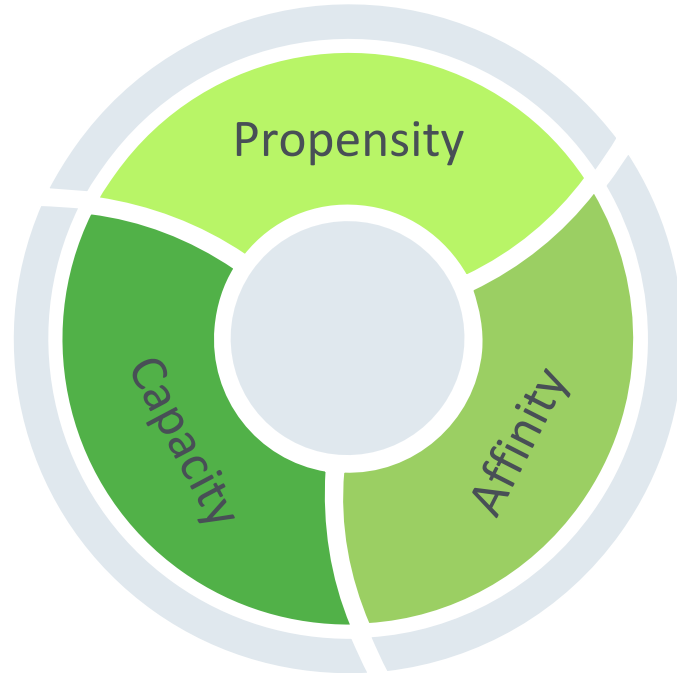


Narrow it down

Red sharpie time!

- Cross off corporations and foundation.
- Once eliminated, if you have more than 200 names on your lists, then narrow the criteria and run the reports again looking for even larger donors and loyal donors at larger amounts and over longer periods of time.

How to rate your donors



A decorative graphic on the left side of the slide. It features a large, dark teal leaf with a white vein, a smaller light green leaf, and a small dark green leaf. There are also several light gray circles of varying sizes scattered around the leaves.

Propensity

Giving History

- A person's giving history (or not!) gives some clues about an individual's inclination to give.
- Identify personal giving habits
- Charitable giving/political giving
- Family foundation



Affinity

Linkage to your cause

- Historical giving to your organization
- Volunteer
- Board member
- Event attendee
- Gives to other like-minded organizations

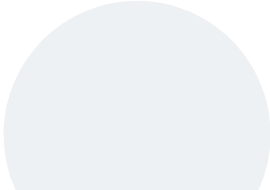
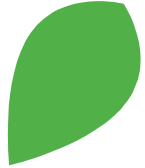
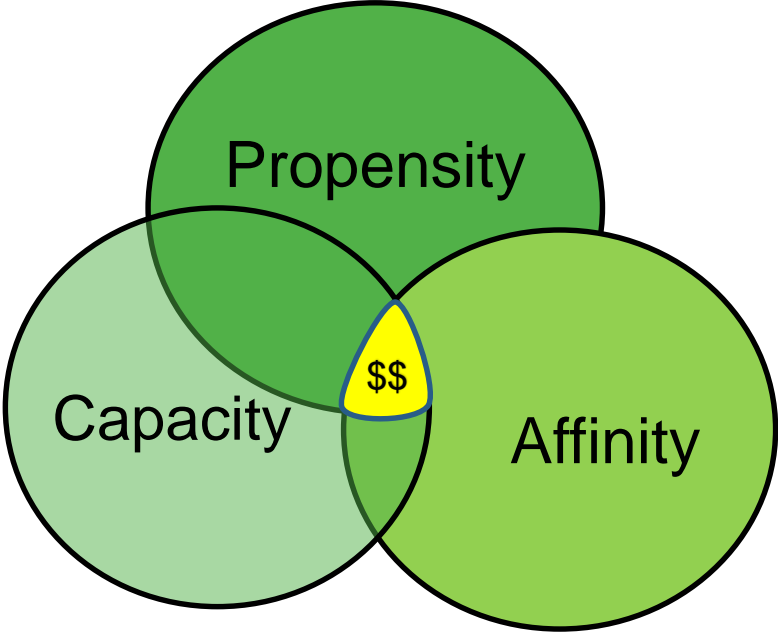


Capacity

Wealth

- Income
- Real Estate holdings
- Stocks
- Assets
- How much they have given to your organization

That sweet spot





Rating Donors

on a budget





Largest donors

	Last year	Life-time	Years
Mary & Joe	6,000	18,000	3
Sally	5,000	40,000	10
Jack	2,500	2,500	1
Sarah & Martha	15,000	18,000	4
Susie	2,500	4,000	5
John & Susan	7,500	15,000	2
Tom	10,000	45,000	6



Most Loyal Donors

	Last year	Life-time	Years
Sam	100	1200	12
Robert & Tim	500	5,000	10
Carol	25	500	20
Rita & Sully	50	400	8
Richard	750	6,750	9
Amanda	250	3,750	15
Paul & Leslie	100	1,800	18

A decorative graphic on the left side of the slide features a large, stylized leaf shape. The leaf is filled with a photograph of a sunflower field in the foreground and a line of white wind turbines in the background under a clear blue sky. The leaf is surrounded by several light gray circles of varying sizes.

Buddy Up!

Getting ready to rate your prospects.

- Board
- Staff
- Volunteers
- Committee

	Last year	Life-time	Years	Rating (P,A,C=total)			
Mary & Joe	6,000	18,000	3				
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Tom	10,000	45,000	6		4	5	
Sam	100	1200	12		5	3	
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Carol	25	500	20		5	2	
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	Last year	Life-time	Years	Rating (P,A,C=total)			
Mary & Joe	6,000	18,000	3	5	4	5	14
Sally	5,000	40,000	10	5	5	5	15
Jack	2,500	2,500	1	4	1	4	9
Sarah & Martha	15,000	18,000	4	5	4	5	14
Susie	2,500	4,000	5	5	4	4	13
John & Susan	7,500	15,000	2	4	3	5	12
Tom	10,000	45,000	6	5	4	5	14
Sam	100	1200	12	5	5	3	13
Robert & Tim	500	5,000	10	5	5	4	14
Carol	25	500	20	5	5	2	12
Rita & Sully	50	400	8	5	4	2	11
Richard	750	6,750	9	5	4	4	13
Amanda	250	3,750	15	5	5	4	14
Paul & Leslie	100	1,800	18	5	5	3	13

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John & Susan	7,500	15,000	2	4	3	5	12
Carol	25	500	20	5	5	2	12
Rita & Sully	50	400	8	5	4	2	11
Jack	2,500	2,500	1	4	1	4	9



Finding New Donors

Friendraising



Friendraising





Other ways

- Land Projects
- Event attendees
- Website visitors
- Social media
- New homeowners

Have a Friendraising Plan



Engagement

- Take a property tour
- Meet the ED
- Receive newsletter with personal note
- Meet a landowner

Financial Support

- Invite them to an event
- Ask for a business sponsorship
- Send an appeal letter with personal note
- Arrange a peer meeting



Engaging Your Board



Expectations

- Step 1: Prep a board member job description that includes fundraising.
- Step 2: Identify skills and characteristics missing from your current board.
- Step 3: Proper orientation



Donor Cultivation



2019

JAN

S	M	T	W	T	F	S
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

FEB

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17	18	19	20	21	22	23
24	25	26	27	28		

MAR

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24	25	26	28	29	30	
31						

APR

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20	21	22	23	24	25	26
27	28	29	30			

MAY

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JUN

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JUL

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27	28	29	30	31		

AUG

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SEP

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28	29	30				

OCT

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		1	2	3	4	5
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20	21	22	23	24	25	26
27	28	29	30	31		

NOV

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10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

DEC

S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

January – Invite them on a snowshoe walk of a conserved property

February – Send them a Valentine's Day card

March – Invite them out for coffee

April – Send them a newsletter with a personal note

May – Invite them on a bird walk

June – Give them a personal update

July – Invite them to a wine & cheese event

August – Invite them to volunteer

September – Send them a newsletter with a personal note

October – Invite them on a fall foliage hike

November – Invite them to meet the ED

December – Send them a holiday greeting

Cultivation Plan for _____ Today's date: _____

Month	Activity	Responsible party	Notes
January			
February			
March			
April			
May			
June			
July			
August			
September			
October			
November			
December			



Donor Stewardship

Donors Aren't ATM Machines

Donors are so much more than a money tree!

Donors save land, save lives, feed the hungry, house the homeless, educate children and cure diseases.

Without donors you wouldn't have an organization.

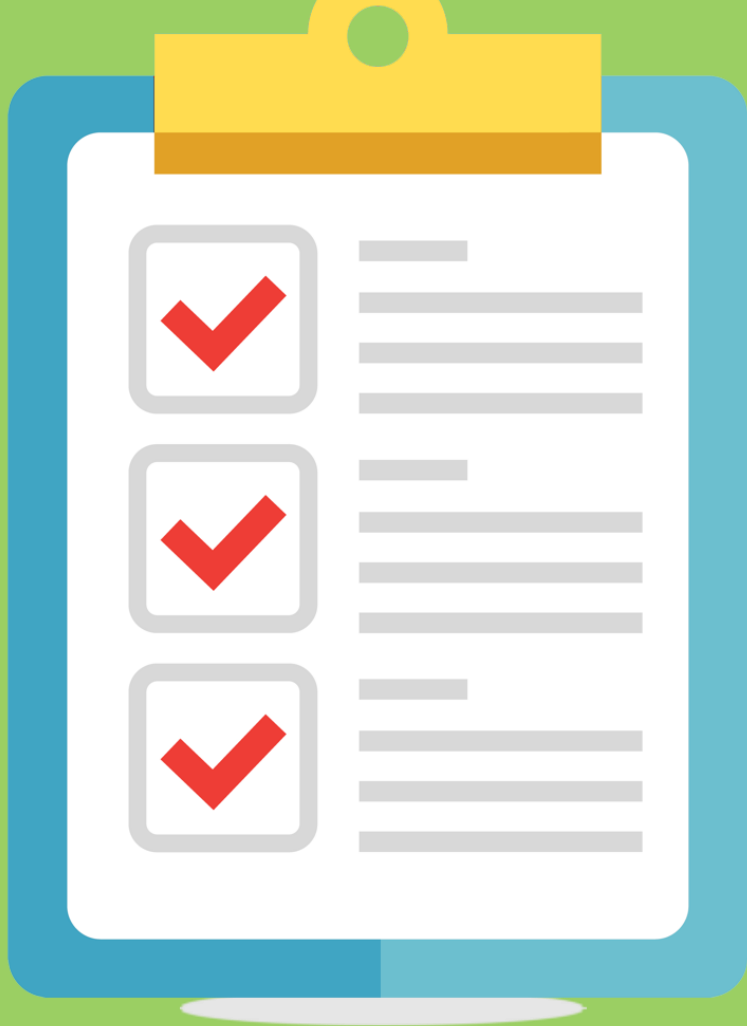
Stewardship is about making donors FEEL thanked.





Caring for Donors

- Donors don't give to organizations that don't appreciate them
- Do they FEEL thanked
- Plan the thank you pieces before the ask even happens
- A donor needs to be thanked in multiple ways by multiple people
- A thank you is more than a tax receipt
- How was my gift used?
- Creative thank you ideas?



What's Your Plan?

Who?

Board Members

Executive Director

Development Staff

Land Staff

When?

ASAP

48-hrs = 400
times more
likely

How?

In addition to the
tax receipt, donors
should receive a
handwritten card
or note

Newsletter

Annual Report

Website

Convey the Impact!

The background is a solid light green color. On the left side, there are several decorative elements: a large, semi-transparent light green circle in the top left; a smaller, semi-transparent light green circle in the top center; a dark green leaf with a prominent vein pattern in the center; a medium-sized dark green leaf with a single vein in the bottom left; and a bright lime green teardrop shape in the bottom center. The text 'Setting Goals' is positioned on the right side of the image.

Setting Goals

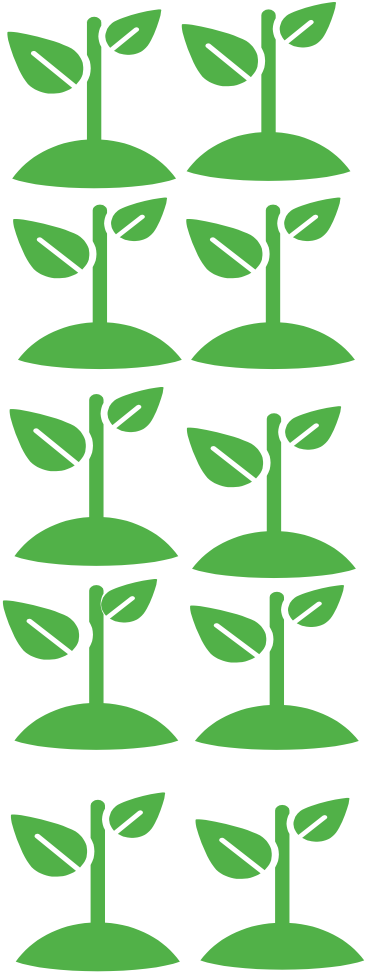


Target Amount **\$200,000**

Gift Amount	No. of Gifts	No. of Prospects Required	Row Total	Cumulative Total
50,000	1	4	50,000	50,000
25,000	1	4	25,000	75,000
20,000	2	8	40,000	115,000
10,000	2	8	20,000	135,000
7,500	3	12	22,500	157,500
5,000	5	20	25,000	182,500
2,500	7	28	17,500	200,000
	21	84		200,000



Measuring Success



\$100,000



\$100,000




Retention

Dollars (requested/received)

Meaningful Visits

Stewardship Efforts





First Meeting - Relationship Cultivation





Prepare for Objections

- I already gave
- Why me?
- I have no time
- I'd prefer to talk on the phone



Set a Goal for Your Meeting

Does the donor need to be more engaged?

Do you need to know more about the donor's motivations and interests?

What prompted the donor to originally give to your nonprofit? And what would motivate them to give more?



What made you decide to give to us in the first place?

What motivates you to continue to give?

What inspires you about our work?

What do you like most and least about our organization?

Do you have a personal connection to our organization?

How do we treat you as a donor compared with other organizations? How can we do a better job?

Would you like to get more involved/volunteer?





Next Steps

- Set a next meeting date
- Send information
- Get them involved as a volunteer
- Answer questions



What's the
Right Ask?





Use what you have!

- What have you learned?
- What does your donor do for living?
- How much do they give to you and to other organizations?
- How much is their house worth?
- Do they have a major life event they are paying for (child's college/wedding)



Calculate Ask Amount

Average amount over
the last few years

Multiply by 5

Consider other factors

Calculate using past
giving



Ask Agenda



Who?

Where?





Agenda

- 20-30 minutes
- Small talk
- Recap Purpose
- Story/vision
- Ask for questions/concerns
- Specific Level of Support
- Follow up plan



Prepare

- Schedule a time and place to meet
- Role play the ask with the people attending
- Know the purpose and story
- Prep everyone about the donor

ASK!

ASK!

Ask!

ASK!

ASK!



Yes

MAYBE

No!



Back to Donor Stewardship



Thanks!

ANY QUESTIONS?

You can find me at

• mlsabourin@franklinlandtrust.org



Resources

Real Estate: www.zillow.com

Tax Assessors: <http://www.vgsi.com/assessors-online-database/massachusetts/>

Obituaries: www.legacy.com

Donations: www.dsgiving.com

Political Giving: www.opensecrets.com

Foundation Information: www.guidestar.org

Charity Search: www.charitynavigator.org

Business Info: www.linkedin.com

SEC Documents: <https://www.sec.gov/edgar.shtml>

MA Office of Campaign & Political Finance: <https://www.ocpf.us/Home/Index>

MA Corporations <http://corp.sec.state.ma.us/corpweb/CorpSearch/CorpSearch.aspx>