

# Major Gifts in Two Hours a Week



- President, Asking Matters
- developer of the Asking Styles
- 30-year front-line fundraiser
- more than 3,000 meetings
- numerous 7-figure gifts closed
- trainer, coach, presenter and author



## What We Will Cover Today

- I. The Why and What of Major Gifts
- II. Find the Time
- III. Develop the Plan
- IV. Identify and Manage Prospects
- V. Outline Cultivation Opportunities
- VI. Involve the Board
- VII. Questions



The slides and bonus materials can be found at this link:  
[www.charityhowto.com/2012](http://www.charityhowto.com/2012)





---

---

---

---

---

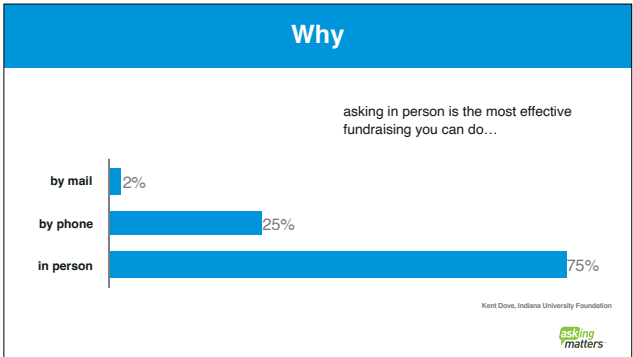
---

---

---

---

---



---

---

---

---

---

---

---

---

---

---

Why

**3 out of 4**  
asks result in a gift

askline matters

---

---

---

---

---

---

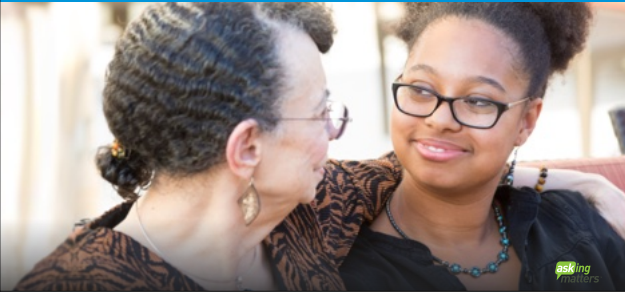
---

---

---

---

## Why



---

---

---

---

---

---

---

---

---

---

## Why

**\$557 billion**

ask ing matters

---

---

---

---

---

---

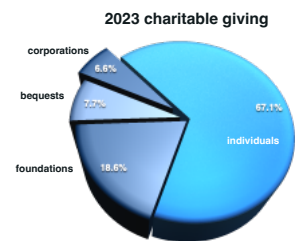
---

---

---

---

## Why



Source: Giving USA

ask ing matters

---

---

---

---

---

---

---

---

---

---



## What



---

---

---

---

---

---

---

---

---

---

## What

A major gift is a gift worth your...



---

---

---

---

---

---

---

---

---

---

## What

Goal:  
Raise \$100,000

Assume:  
100 donors

\$80,000 will come from  
20% of your donors

\$80,000 comes from 20 donors  
an average gift of \$4,000

ask me matters

---

---

---

---

---

---

---

---

---

---

## What



giving matters

## What

Total Costs: \$10,000  
Assumption: 20 donors make gifts

5 gifts @ \$500	\$2,500
10 gifts @ \$1,000	\$10,000
5 gifts @ \$1,500	\$7,500
Total Revenue:	\$20,000
Net Revenue:	\$10,000

giving matters

## What

Total Costs: \$10,000  
Assumption: 20 donors make gifts

5 gifts @ \$1,000	\$5,000
10 gifts @ \$1,500	\$15,000
5 gifts @ \$2,500	\$12,500
Total Revenue:	\$32,500
Net Revenue:	\$22,500

giving matters

## What

Total Costs: \$10,000  
Assumption: 20 donors make gifts

5 gifts @ \$1,500	\$7,500
10 gifts @ \$2,500	\$25,000
5 gifts @ \$5,000	\$25,000
Total Revenue:	\$57,500
Net Revenue:	\$47,500

askimg  
matters

## Find the Time



askimg  
matters

## Find the Time

### major gift program

- initial prospect list
- meetings to discuss prospects
- management of tracking system
- special communications
- special cultivation events



askimg  
matters

## Find the Time

for each prospect

research

personalized  
communications

strategy discussions

at least two meetings a year

ask  
matters

## Find the Time

### Time Commitment Per Meeting

ACTION	TIME
Preparation to get ready to set meeting	0.5 to 2.0 Hours
Time setting up meeting	0.25 to 1.5 Hours
Meeting including travel time (local)	1.0 to 4.0 Hours
Follow-up note, contact report, and other actions	1.0 to 3.0 Hours

2.75 to 10.5 Hours

ask  
matters

assume 6 hours  
per meeting

ask  
matters



## Find the Time



1 staff x 2 hours/week x 48  
weeks



- 10 hours for admin (10%)  
= 86 total hours

getting  
matters

## Find the Time

Each prospect takes on  
average  
12 hours of work per year  
(2 meetings)

$86/12 = 7$  active prospects

getting  
matters

## Find the Time

each 2 hrs/wk =  
7 active prospects

getting  
matters



## Develop the Plan

**S M A R T**

**Specific**

Objectives need to be clear and detailed.

**Measurable**

Results need to be measurable.

**Agreed To**

The people who have to make it work need to agree to it.

**Realistic**

The people involved have to believe it is possible to achieve.

**Time-specific**

Deadlines for achieving each stage should be set.



---

---

---

---

---

---

---

---

---

---

## Develop the Plan

**specific**

**increase board involvement in fundraising**

Find board leader to advocate

Make presentation at board meeting

Work with committee to develop training Plan

Create tracking system



---

---

---

---

---

---

---

---

---

---

## Develop the Plan

**measurable**

**increase board involvement in fundraising**

get 4 more board members to open doors

work with 6 board members to set up or participate in at least 12 solicitation meetings

close 6 gifts of \$2,500 or more



---

---

---

---

---

---

---

---

---

---

## Develop the Plan

### agreed to

increase board involvement in fundraising

plan presented to board at January meeting for approval

individual meetings with each board member to develop action plans

confirm action steps in writing

askling matters

---

---

---

---

---

---

---

---

---

---

## Develop the Plan

### realistic

increase board involvement in fundraising

involve x number of board members - not all

have 50% of those board members actually set up meetings

have 50% of those meetings result in a gift

askling matters

---

---

---

---

---

---

---

---

---

---

## Develop the Plan

### time-specific

increase board involvement in fundraising

present to board in January

meet with all board members in February and March

start setting up meetings in April

have two meetings each month

conduct all meetings by November 1

askling matters

---

---

---

---

---

---

---

---

---

---

## Develop the Plan

### Strategy #1: Increase trustee annual fund gifts by 9% in FY2018 from \$64,000 to \$70,000.

In FY2018 we will continue to focus significant attention on trustee giving and we will conduct individual, in-person solicitations. This year, those solicitations should be completed by the end of the summer. We anticipate that this year's growth will be modest, as was last year's, for two reasons. First, we have had a difficult time increasing the size of the board, success at which would in and of itself lead to more board giving overall. Second, we are certain to be asking our board commit significant resources to the capital campaign this year, and this will limit any additional gifts that current trustees might otherwise consider. Given the challenges in bring on new trustees, we are anticipating only \$5,000 in gifts from new trustees. We anticipate very modest aggregate growth from current trustees. We must take this year to set some long-term goals for the growth of the board in size and economic impact.

Task \_\_\_\_\_ Responsibility \_\_\_\_\_ Timeline \_\_\_\_\_

1. Conduct board audit and solicitation process through one-on-one, in-person meetings. Smith 9/15/18
  2. Have a net gain of at least 2 trustees. BLC, Massey, Smith 3/30/18
- \*This replaces setting a goal of 4 new trustees because that achievement could be neutralized by the resignation of 4 trustees, which would result in a zero net gain.



## Develop the Plan

### monitoring the plan



## identify and manage prospects



## Identify and manage prospects

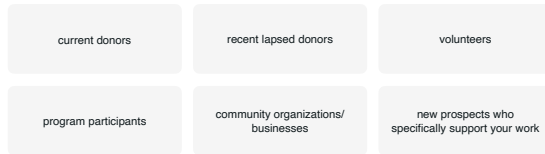
the ABCs of qualifying prospects



askling  
matters

## Identify and manage prospects

who are good prospects?



askling  
matters

## Identify and manage prospects

Prospect Name	Relationship to You	Your Comfort Level Soliciting this Prospect	Relationship to Organization	Giving History	Giving Capacity	Readiness to Give	Total (30 max)
	1- unknown 2- acquainted 3- friendly 4- know well 5- very close	1- dread the thought 2- would be awkward 3- will do it 4- no problem asking 5- looking forward to it	1- unknown 2- acquaintance 3- supporter 4- friend 5- close friend	1- no gift yet 2- sporadic giving 3- gifts, but not recently 4- steady the last 3 years 5- numerous and steady	1- very limited 2- modest 3- solid 4- top 25% 5- very significant	1- not ready at all 2- could be convinced 3- probable 4- highly likely 5- just waiting to be asked	

askling  
matters

## Identify and manage prospects

Prospect Name	Relationship to You	Your Comfort Level Soliciting this Prospect	Relationship to Organization	Giving History	Giving Class
	1- unknown 2- acquainted 3- friendly 4- know well 5- very close	1- dread the thought 2- would be awkward 3- will do it 4- no problem asking 5- looking forward to it	1- unknown 2- acquaintance 3- supporter 4- friend 5- close friend	1- no gift yet 2- sporadic giving 3- gifts, but not recently 4- steady the last 3 years 5- numerous and steady	1- very low 2- modest 3- solid 4- top 25% 5- very sig

ask  
matters

## Identify and manage prospect

who should evaluate prospects?



ask  
matters

## Identify and manage prospects

Prospect Tracer	Prospect	Contact Info	Request & Given history	Next Action Step	Comments
	name	home	request	action	
	address	work	project	date	
	cell	other	gift history	valuation	
	email			staff	
	name	home	request	action	
	address	work	project	date	
	cell	other	gift history	valuation	
	email			staff	
	name	home	request	action	
	address	work	project	date	
	cell	other	gift history	valuation	
	email			staff	

ask  
matters





## Cultivation Opportunities

### general donor cultivation

- thank you's
- volunteer events
- mailings
- invites
- social media



## Cultivation Opportunities

### Meet Kim: From shy and quiet to an expressive leader

Kim is grateful for the opportunities Adventure Stage Chicago and Trailblazers gave her. Trailblazers pairs young teens with professional artist mentors, and gives them the tools of the trade, empowering them to create an original piece of work to perform at the end of each semester. Adventure Stage Chicago programs have not only impacted her, but also her whole family. Her brothers have followed her into Trailblazers. Speaking of her experience she said:

"Trailblazers is a place for fun -- not an obligation. We created our own show, we went to House In The Wood during the summer and performed with other campers around the campfire. Trailblazers has planted a seed, given me a love of theater. But more than that, it has taught me to open up and express myself, and taught me how to be a leader."

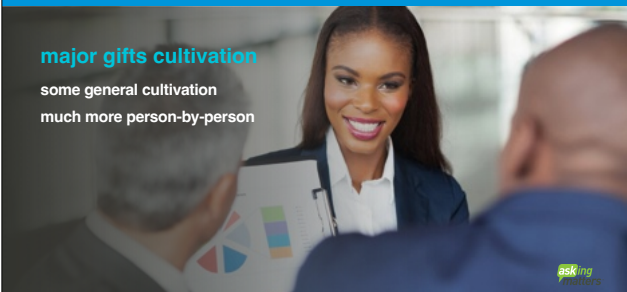


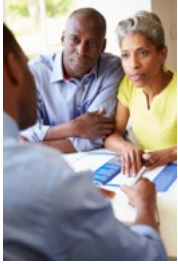
Kim learned about hard work, relationships and how to tap into her creative side. All things she'll need to succeed next year as she enters college on a full scholarship.

## Cultivation Opportunities

### major gifts cultivation

- some general cultivation
- much more person-by-person





## Cultivation Opportunities

- connect personally
- engage in dialog about the organization and philanthropy
- invite to experience the organization
- ask for everything but money
- personalize everything

ask  
ing  
matters

## Cultivation Opportunities



ask  
ing  
matters

## Cultivation Opportunities

### educate

- invite to experience program
- invite to meet participants
- share inside information
- ask what they'd like to know



ask  
ing  
matters

## Cultivation Opportunities

### involve

- ask to volunteer
- ask for expert advice
- ask to sit on a committee



ask/ing  
matters

---

---

---

---

---

---

---

---

## Cultivation Opportunities

### ask

- in-kind products
- in-kind services
- introductions/connections
- background on donors



ask/ing  
matters

---

---

---

---

---

---

---

---

## Cultivation Opportunities

### thank

- personalized
- individualized
- multiple times from multiple sources
- thoughtful program-related gifts



ask/ing  
matters

---

---

---

---

---

---

---

---

## Cultivation Opportunities

recognize

- donor listings
- profile pieces
- interviews



ask  
matters

## Cultivation Opportunities



What are all the ways you can educate, involve, thank and recognize donors?  
What are all the non-cash items you can request?

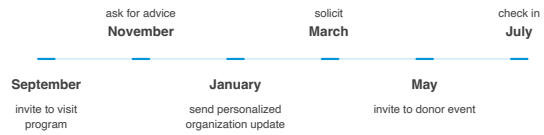
ask  
matters

## Cultivation Opportunities



ask  
matters

## Cultivation Opportunities



ask  
matters

## Involve the Board



ask  
matters

## Involve Your Board

Give and Get  
to the best of your ability

ask  
matters

Involve Your Board

**everyone must**

**Give**

---

ask  
matters

Involve Your Board

**everyone must**  
**help cultivate relationships**

---

ask  
matters

Involve Your Board

**everyone must**  
**ask for something**

---

ask  
matters

Involve Your Board

some (hopefully most)  
must ask for gifts



---

---

---

---

---

---

---

---

Involve Your Board

4  
prospects



---

---

---

---

---

---

---

---

Involve Your Board

what training do  
they need

- crafting their unique case for support
- understanding the basics of the cultivation and asking process
- opening the door
- asking good questions
- dealing with no's and maybe's



---

---

---

---

---

---

---

---





## Start Today

### where to start

really think it through

get key people on board

figure out what's reasonable to expect

start with the low-hanging fruit

ask<sup>ing</sup> matters

---

---

---

---

---

---

---

---

## Things to Remember



ask<sup>ing</sup> matters

---

---

---

---

---

---

---

---

## Things to Remember

- major gifts are incredibly important
- think of what your organization wants to be and what it will take to get there
- any amount of time will get a major gift effort started
- don't overwhelm yourself with systems and analysis
- make it your own

ask<sup>ing</sup> matters

---

---

---

---

---

---

---

---



## Major Gifts in Two Hours a Week



ask me  
matters

---

---

---

---

---

---

---

---