

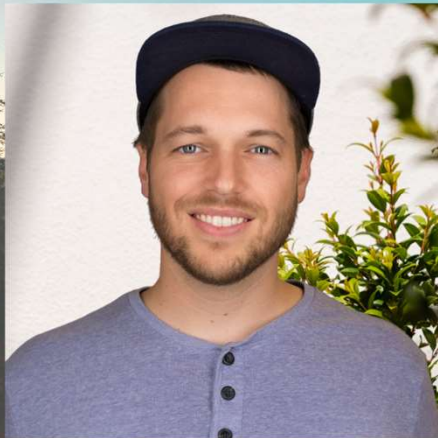
Raising Major Gifts: A 4-Step Proven Plan

*Evangeline Pattison, Vice President Client Services
+ Senior Consultant*



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POSTMODERNPULPIT



YOU DO THE MINISTRY, WE DO THE WEBISTRY

2

The FOCUS Group

Our Core Services

- Feasibility Studies
- Capital Campaigns
- Strategic Planning
- Targeted Advancement Counsel
- Research and Foundations
- Training and Tools

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Escaping the Treadmill

Dangerous Patterns

- ✘ Having an unrealistic plan to raise the annual budget
- ✘ Lacking a fundraising team with clearly defined roles and responsibilities
- ✘ Focusing on events and not relationships
- ✘ Every donor gets asked the same way, regardless of his or her ability or desire to give
- ✘ Underutilizing the the most effective way to raise money: meeting donors face to face

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A Better Way

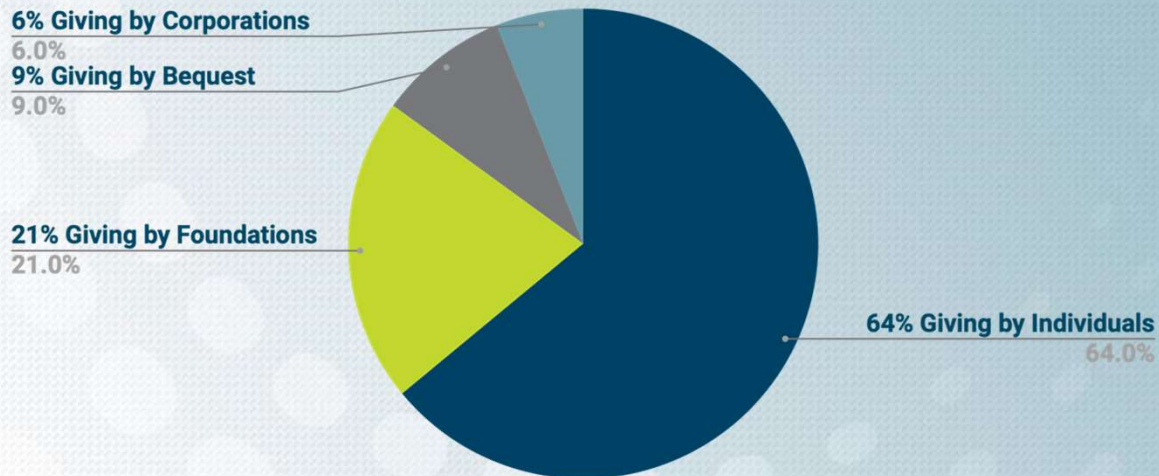
The Taking Donors Seriously® Framework:

- ✔ A well-defined annual fundraising plan
- ✔ A tangible case for support, a case statement, that enables you to clearly share the vision with major donors
- ✔ A prioritized list of donors who are likely to support you, based on their relationship with you or your organization
- ✔ A strategic and personalized approach for every prospective donor
- ✔ A volunteer fundraising team with specific roles & responsibilities

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People are the Biggest Givers

2022 Contributions: \$499.33 billion



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Principles and Practices of Fundraising



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Six Key Principles of Fundraising

1

People give to people they know and people they trust

2

People give because they are asked and shown how

3

People give when they are involved and have a sense of ownership

4

A "no" is never forever

5

Giving is a way of life

6

Proper planning maximizes results and minimizes costs

8

1



People give to people
they know and
people they trust.

John 1:14

Gen 1:26

9

2



People give because
they are asked and
shown how.

Nehemiah 2:4-8,

Mark 10:51

10

3



People give when they are involved and have a sense of ownership.

John 21:6

11

4



Giving is a way of life

Romans 12:4-8

12

5



“No” is never
forever.

Romans 3:23, 6:23

13

6



Proper planning
maximizes results
and minimizes costs.

Luke 23:44-46

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The Asking Process



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Two Primary Rules

When Cultivating Major Gift Donors

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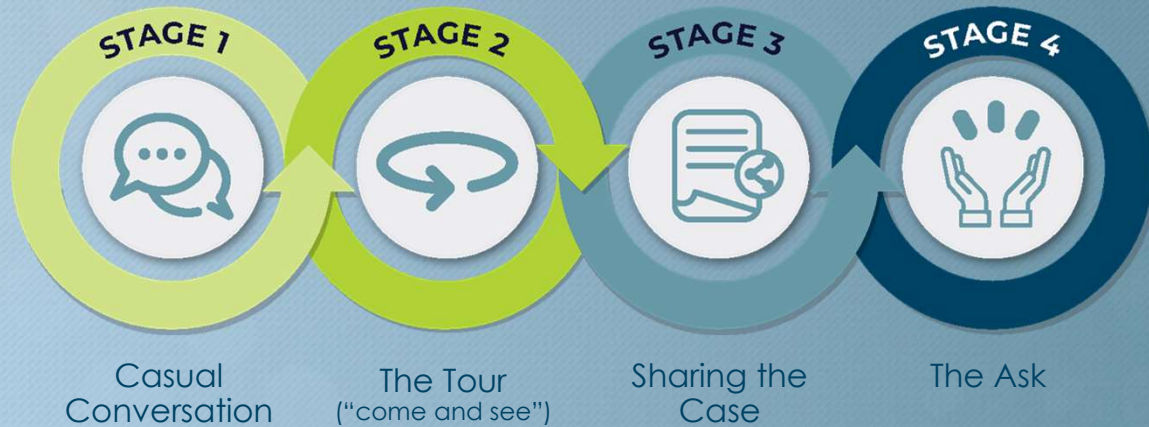
Always let them know ahead of time if you will be asking for a gift.

2

Ask for something they can say “yes” to.

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Four Stages to the Ask

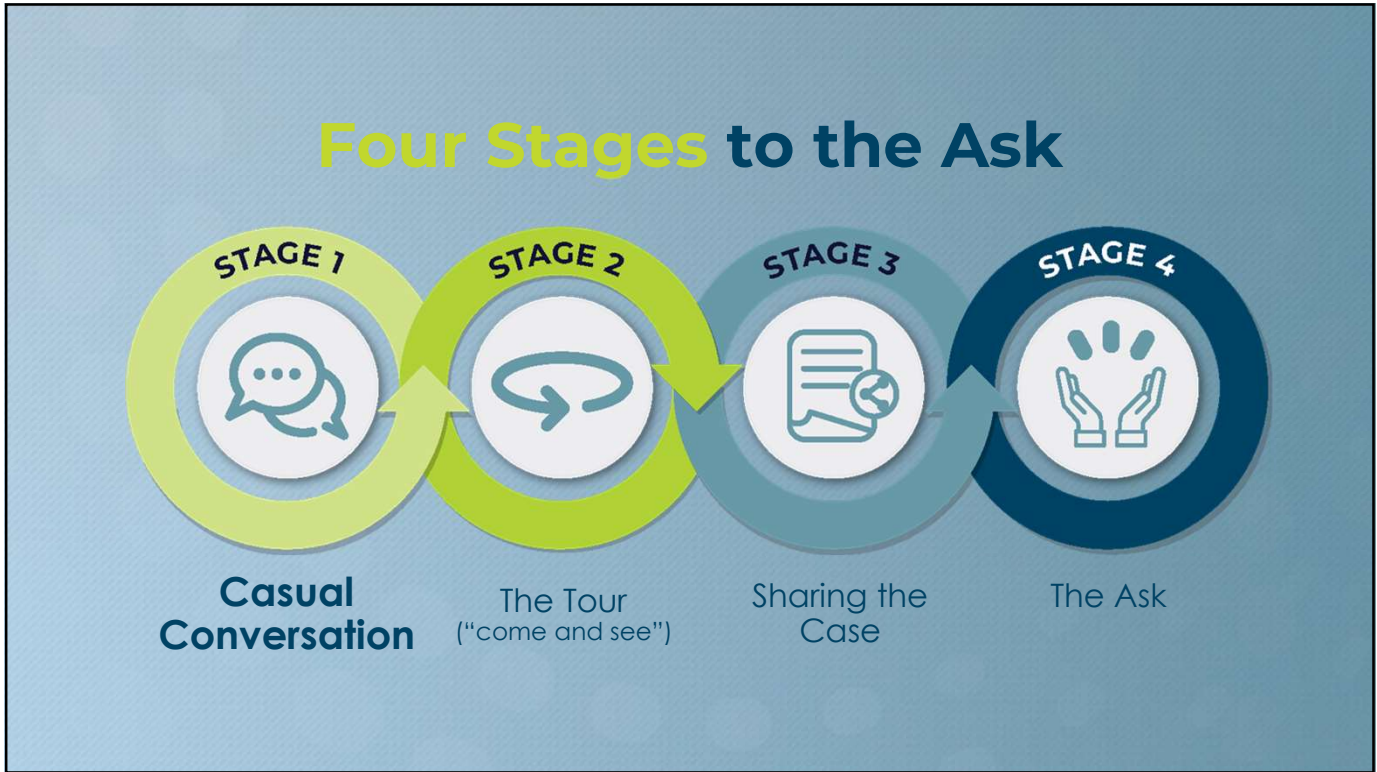


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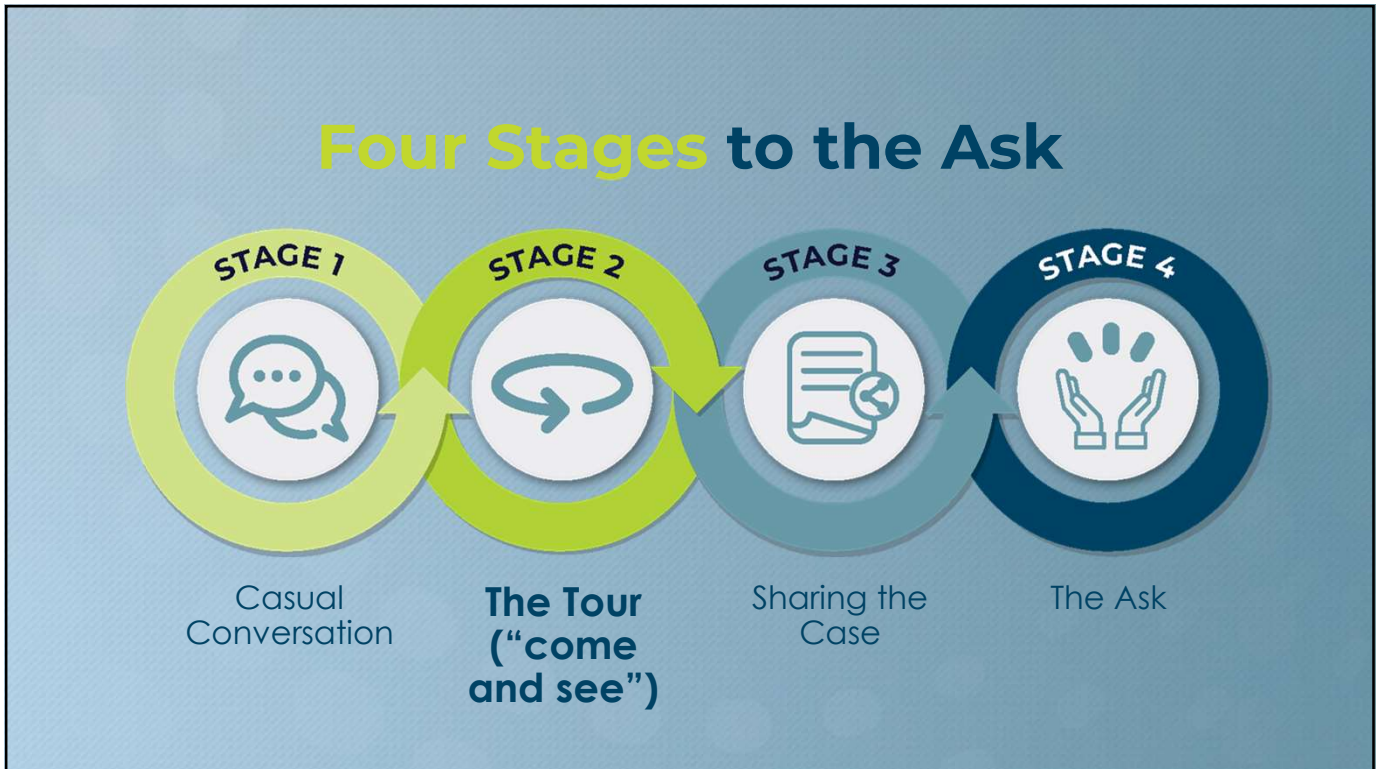
Each Stage has FOUR STEPS:



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Tour Opportunities



Events



Vision Trip/
Location Tour



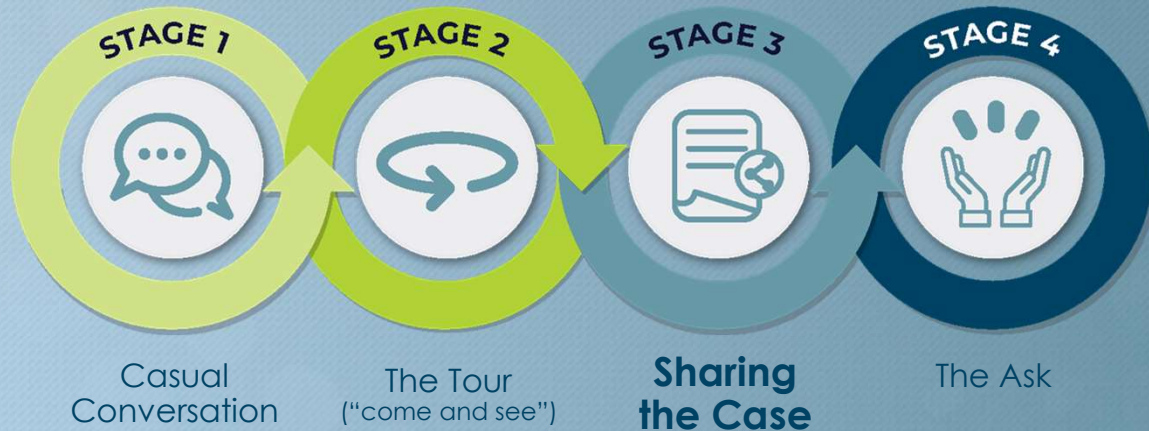
Meet Staff or
Ministry Partners

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What are your organization's tour opportunities that offer a "come and see" experience for donors?

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Four Stages to the Ask



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Strategic Planning Guides the Case

- Affirms your mission and vision
- Validates predicted outcomes
- Creates "buy in" by key constituencies
- Demonstrates organizational competence
- Re-examines strategic assumptions
- Signals leadership effectiveness

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The Fundraising Case

- **What is it?**
 - Best, clearest articulation of your mission and how you fulfill that mission.
 - Required budget and proposed strategy to raise the needed funding.
 - Includes deliverable and measurable outcomes.
- **How is it used?**
 - In personal meetings with prospective donors where the individual or couple has been told prior to the meeting that there is a fundraising agenda.
- **Who is it for?**
 - Major Donors

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Ten Elements of Case for Support

1. Theme / Title Page
2. Need
3. Mission
4. Lifetime Value
5. Program
6. Accomplishments
7. Vision for the Future
8. Financial Needs
9. Gift Plan
10. Leadership Profile

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Before Sharing your Case for Support



- Prepare supplemental information based on the donors' interest
- Be familiar and well versed in the content of the Case
- Identify who is presenting what sections of the case and what the transitions will be
- Consider personal input; stories you can share
- Practice with someone from your team

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Know Your Audience



Plan how you will use the case for each donor/couple:

- Use as a 'horizontal' tool to give an overview, for most donors who will want to hear the 'big picture'
- Use as a 'vertical' tool to drill down to specifics, for donors who will want to hear more about certain aspects

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In Person-Using the Case



- Sit beside the donor and hold the case (but take 2 copies, one for you and one for the donor)
- Draw attention to what you hope to accomplish with this project
- Go through the case giving your own paraphrase; don't read it
- Be enthusiastic - excitement is contagious
- Invite questions and seek feedback – listen deeply
- Before/after you share the budget page, STOP for questions

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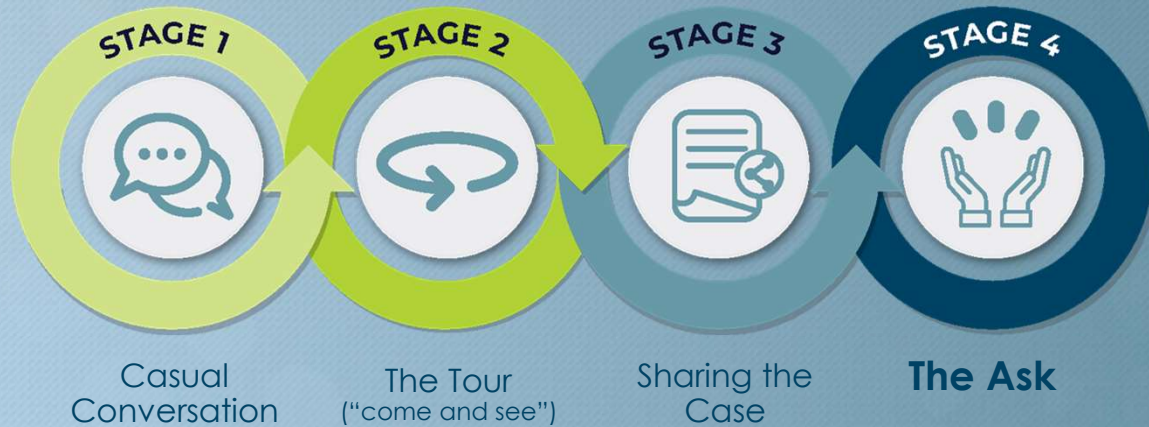
If You're Sharing Virtually



- Make sure it's loaded in the right format and presentable
- Be careful not to be too quick to flip the pages
- Make sure to send them a copy of the case BEFORE or AFTER you present it to them.
- Practice using your presentation tool before your video call

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Four Stages to the Ask



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The Ask

If presenting the case or asking for a gift in your meeting:

1. Present the budget and pause for questions
2. Share the gift plan
3. Decide how to ask
 - a. Ask for a specific amount (10%)
 - b. Leave it open-ended (10%)
 - c. Suggest a gift range (gift plan) (80%)
4. Always leave the ball in your court!!

GIFT PLAN

Number of Donors	Amount	Total
3	\$200,000	\$600,000
3	\$150,000	\$450,000
3	\$100,000	\$300,000
6	\$75,000	\$450,000
8	\$25,000	\$200,000
8	\$50,000	\$400,000
15	\$10,000	\$150,000
24	\$5,000	\$120,000
30	\$2,500	\$75,000
Many	Misc	\$83,673
Total Need		\$2,828,673

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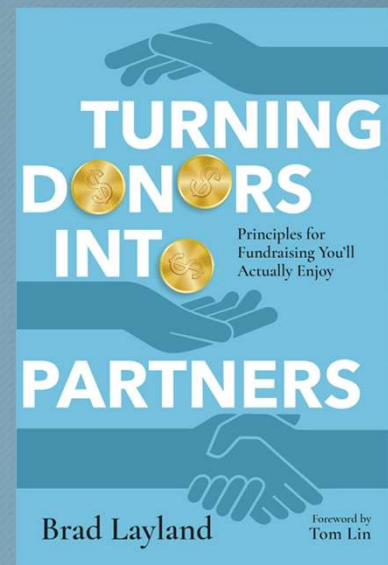
When a donor agrees to make a gift:



- Follow up as you said you would
- Follow up with a note stating the commitment
- Document the commitment
- Always thank them...multiple times
- Always keep “the ball in your court”

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A Helpful Guide
for Everyone
Involved in Fundraising



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