



## AFP Massachusetts

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# Maximizing Your Major Donor Pipeline

**Larry G. Raff**  
Copley Raff, Inc.



Terrified

**1**



Disgusted

**2**



Stubborn

**3**



Ambivalent

**4**



Happy

**5**



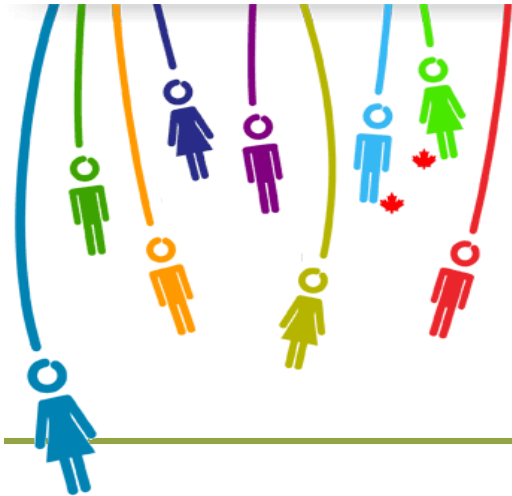
Eager

**6**

# How are you feeling today?

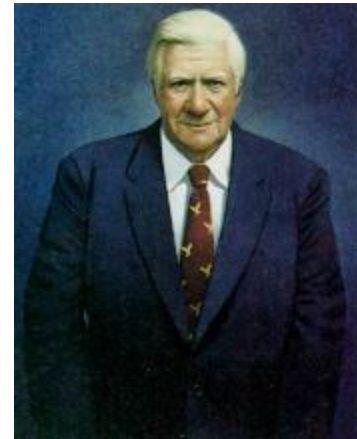
# What I will cover

- Real-life experiences that illustrate key principles for major gift success
- Discovery of unconscious competencies and examples of how we used them intentionally
- Building rapport rapidly
- Introduction to powerful pipeline and relationship management tools



# Truism 1

*Make friends BEFORE you need them.*



Congressman Tip O' Neal

# Truism 2

*Your chances of getting a gift are much better if  
you ask for it than if you don't ask.*

Larry G. Raff



Dogs always ask for  
what they want.

# Disconnect your biases

- Throw out your personal feelings about money– biases can effect your comfort when asking for a gift.
- Get comfortable asking for any amount.
- Ensure that you are never surprised by the response to an ask.
- **Explore what money means to you?**



# High results

Get  
personal



High “touch”

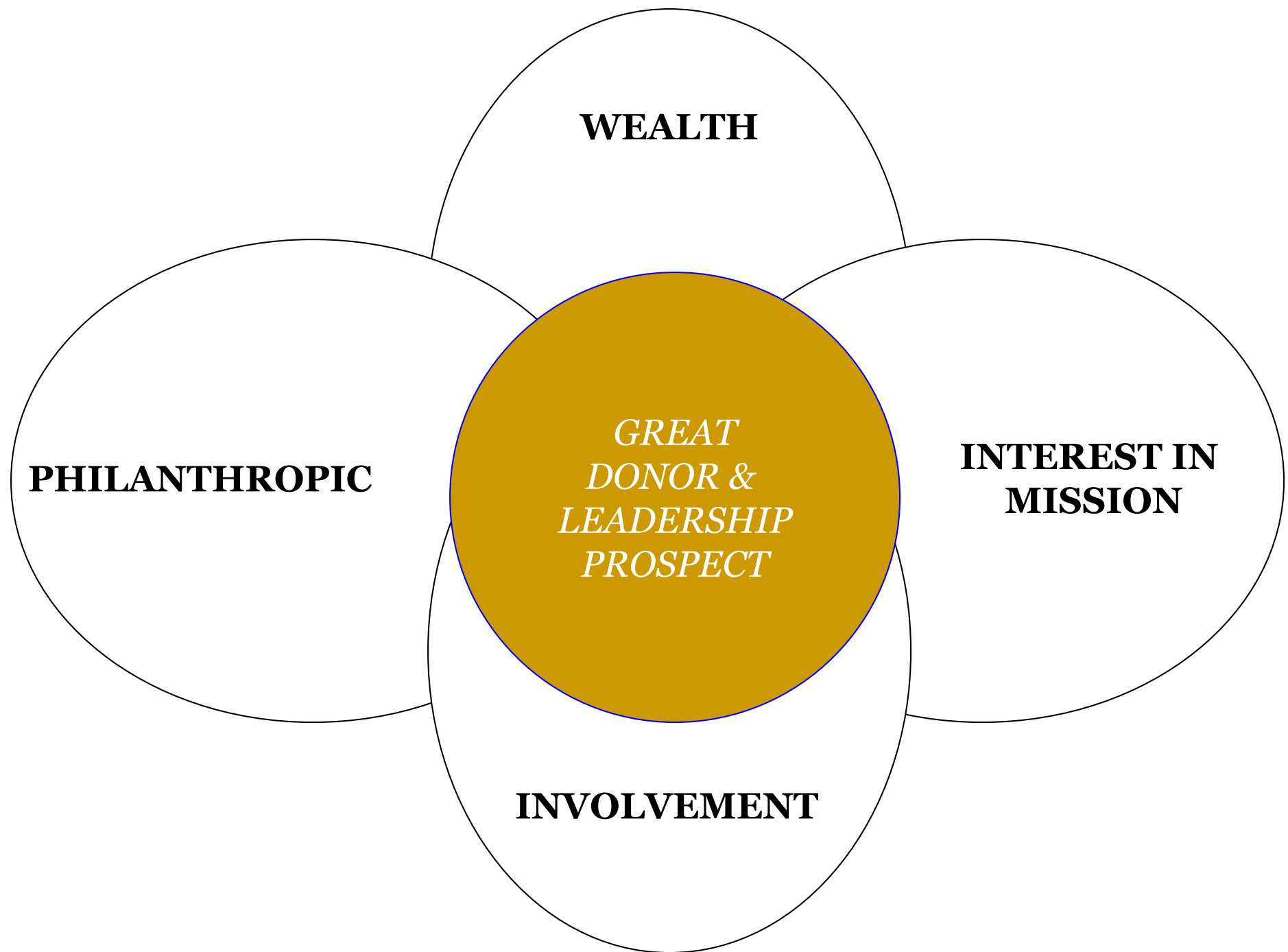




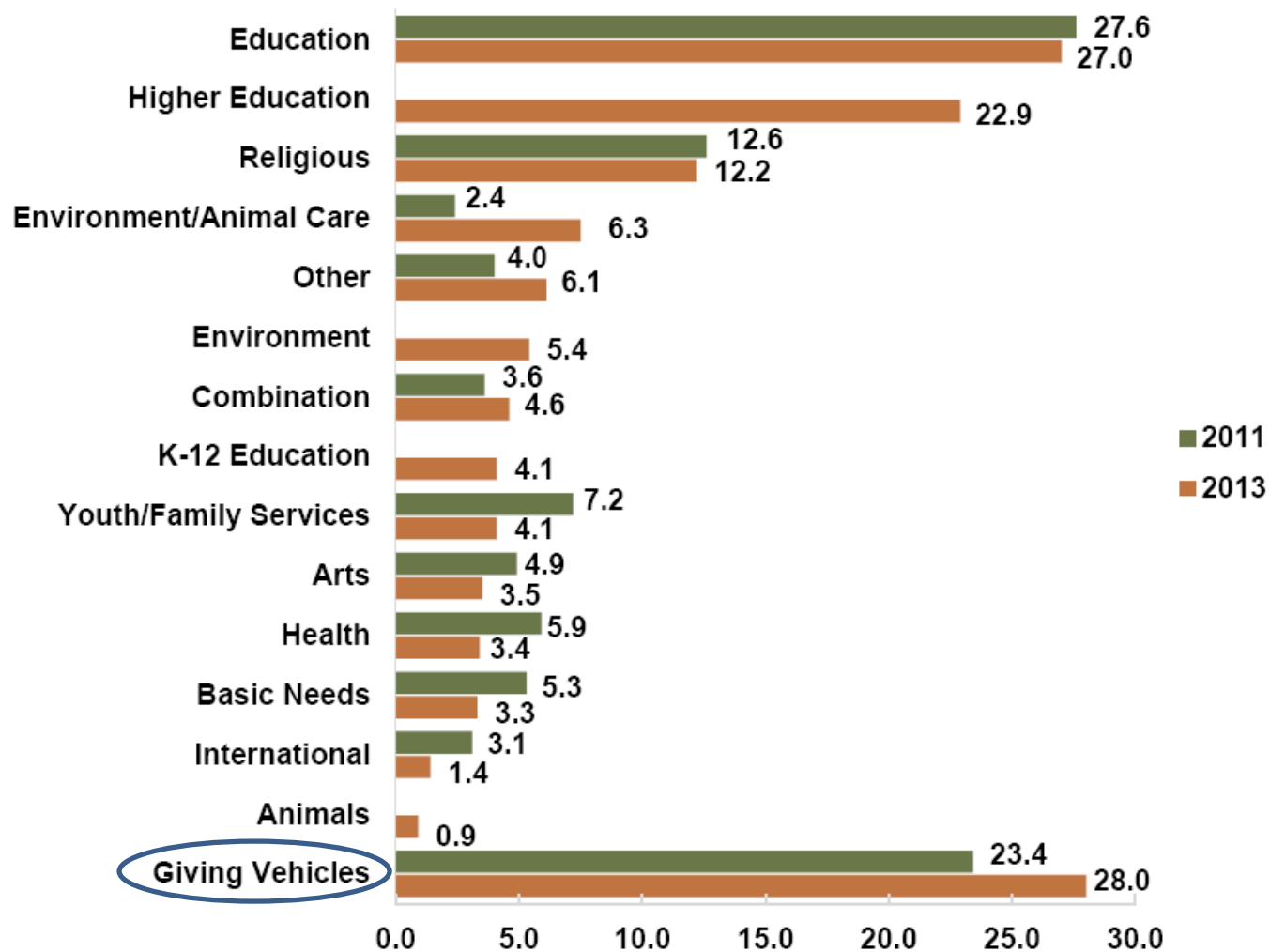
# The philanthropic behavior of high net worth households

Start with basic  
understanding





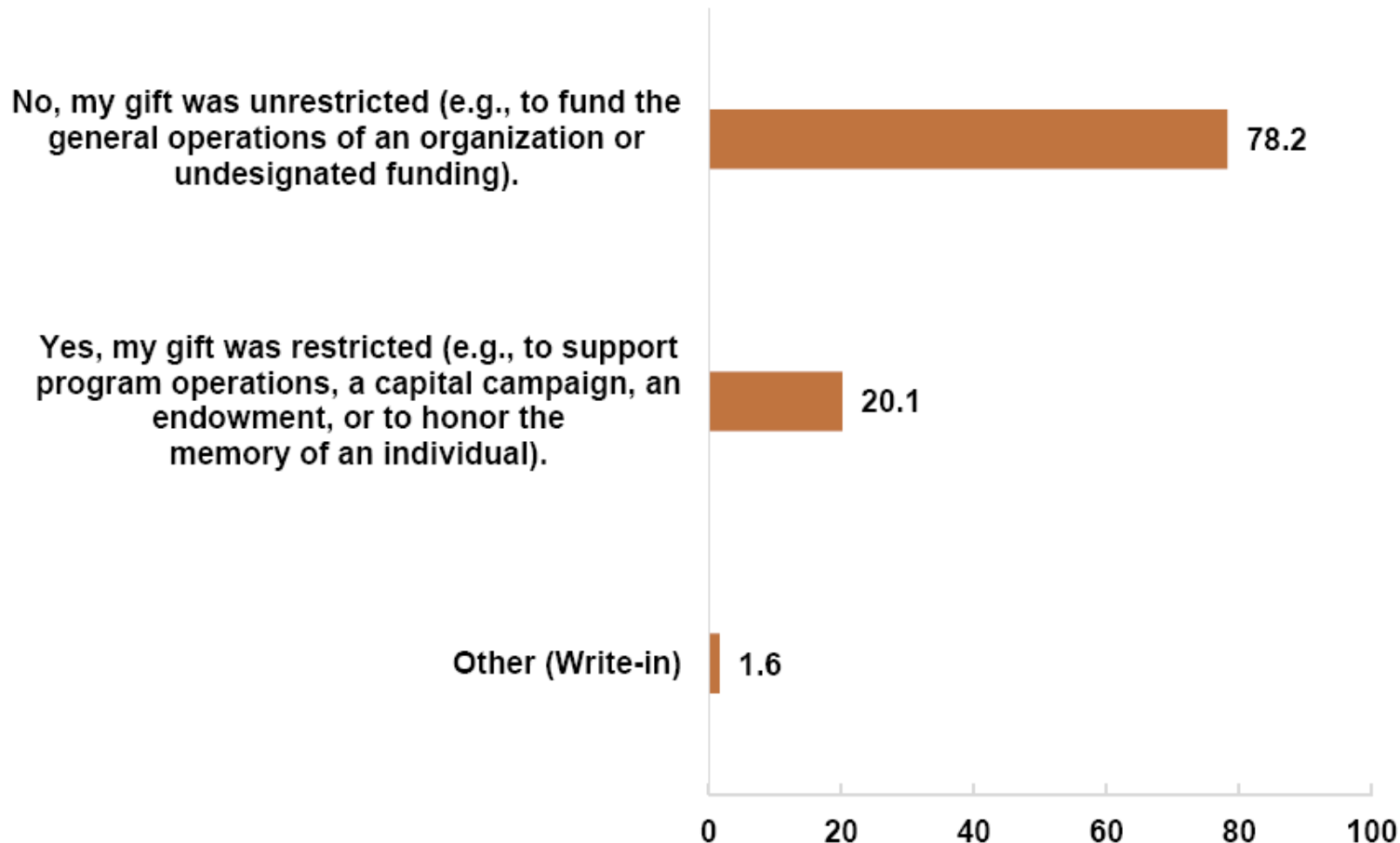
# GIVING TO SECTORS



Source: 2014 US Trust Study of High Net Worth Philanthropy

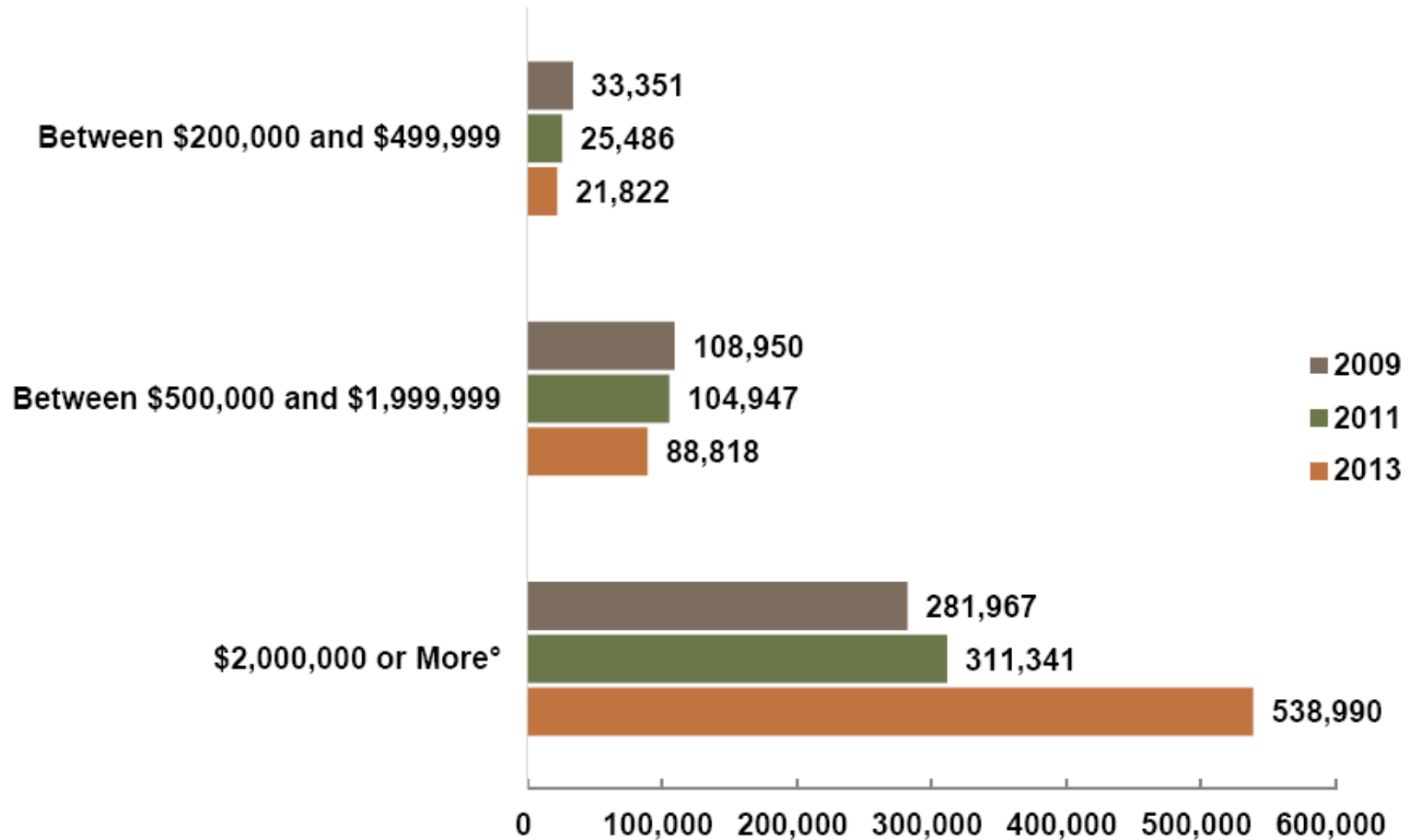
# OBJECTIVE LARGEST GIFT MADE

*“Did you place any restrictions on the largest gift you or your household made in 2013?”*



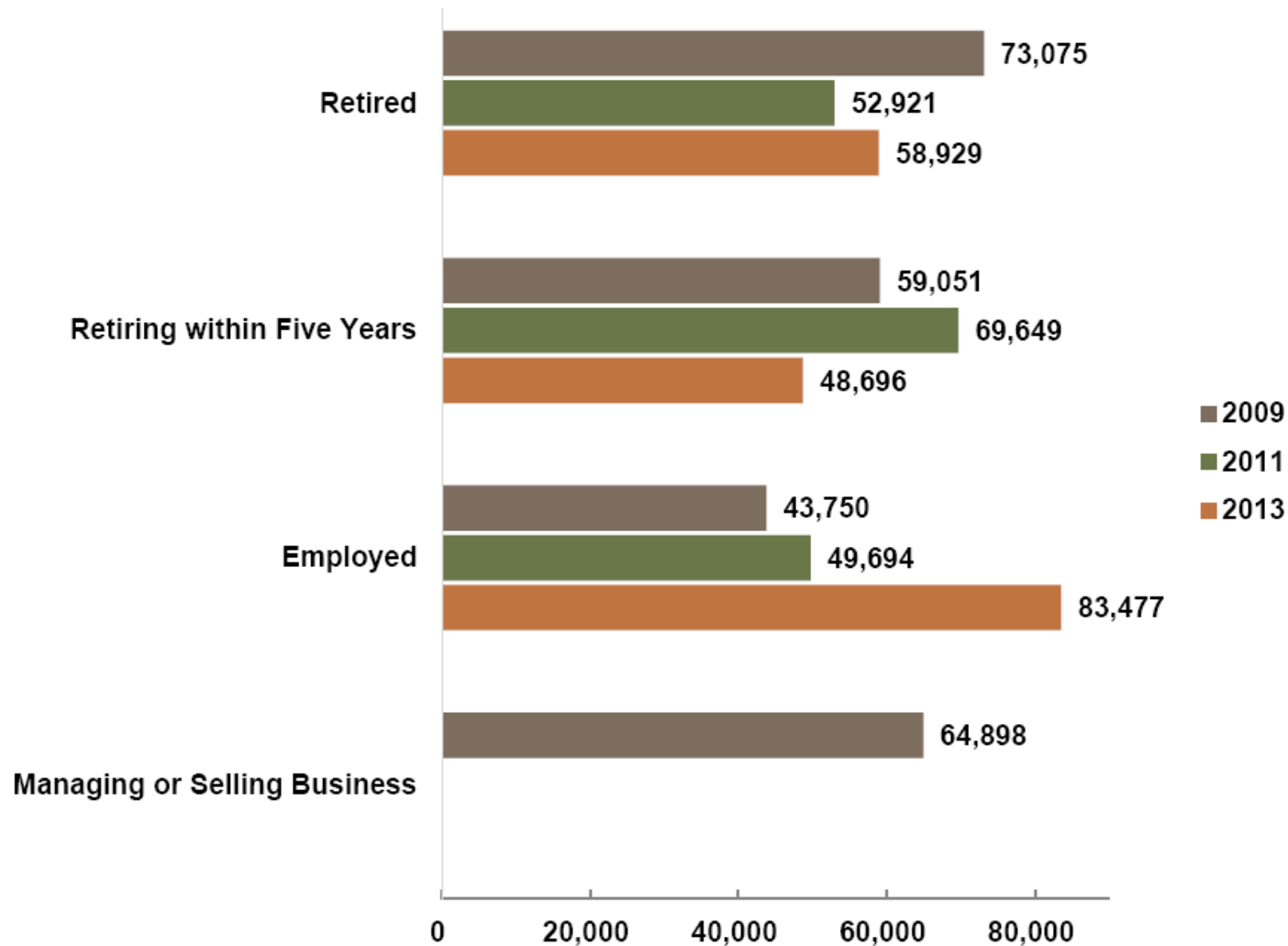
Source: 2014 US Trust Study of High Net Worth Philanthropy

# AVERAGE GIVING BY INCOME



Source: 2014 US Trust Study of High Net Worth Philanthropy

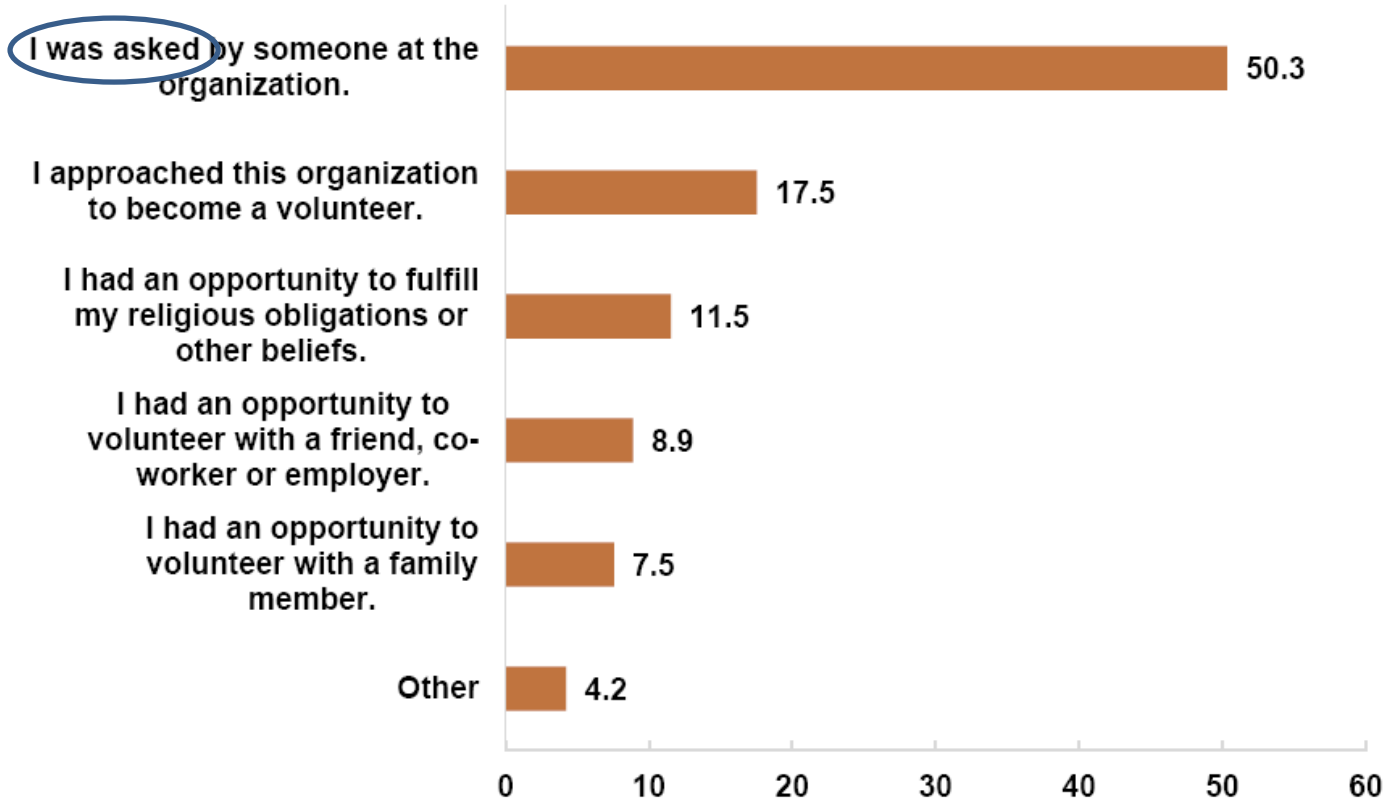
# AVERAGE GIVING BY EMPLOYMENT STATUS



Source: 2014 US Trust Study of High Net Worth Philanthropy

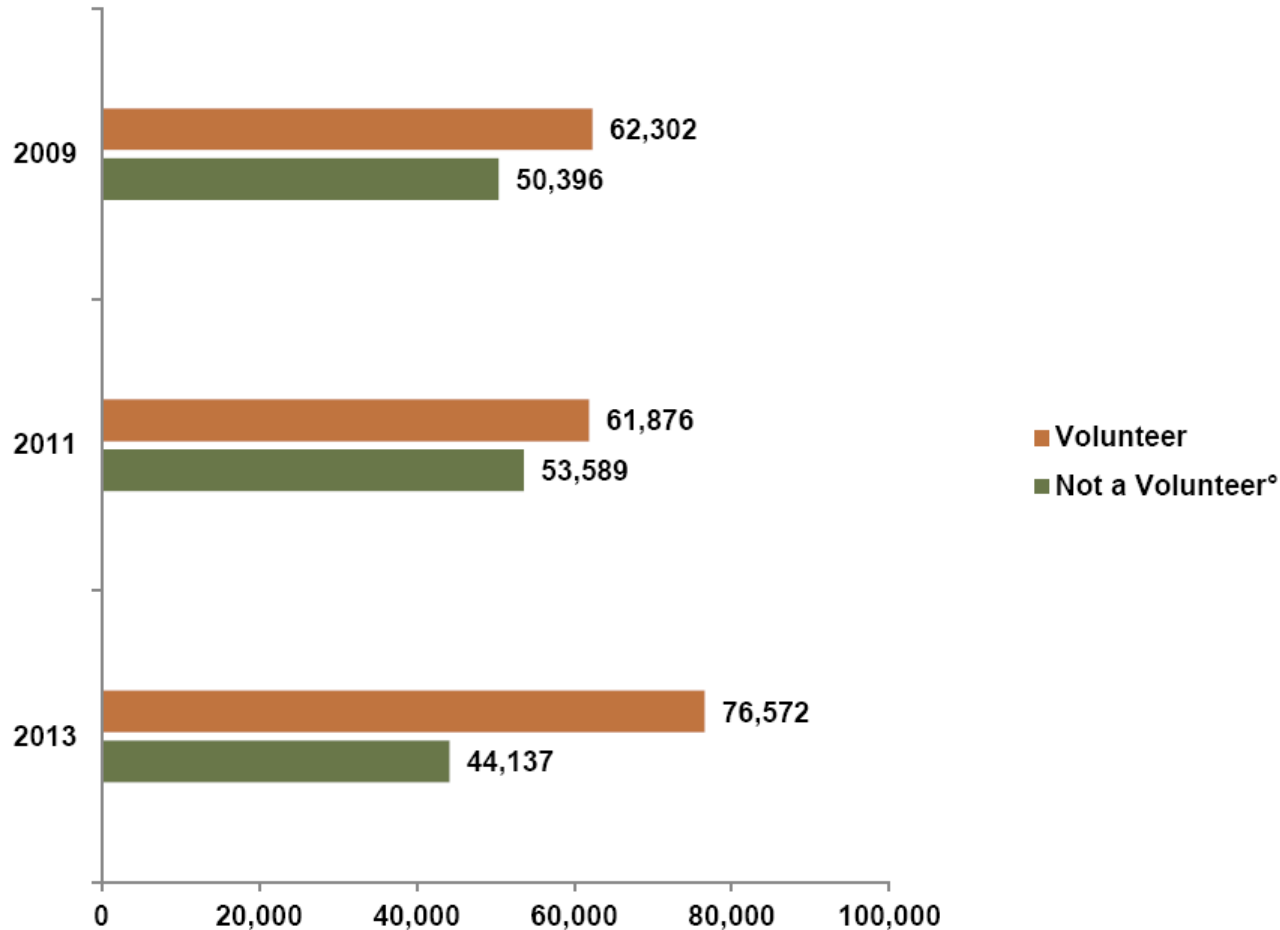
# WHY VOLUNTEER

*"Thinking about the organization for which you volunteered the most hours in 2013, how did you become a volunteer at the organization?" (Mark only one option)*



Source: 2014 US Trust Study of High Net Worth Philanthropy

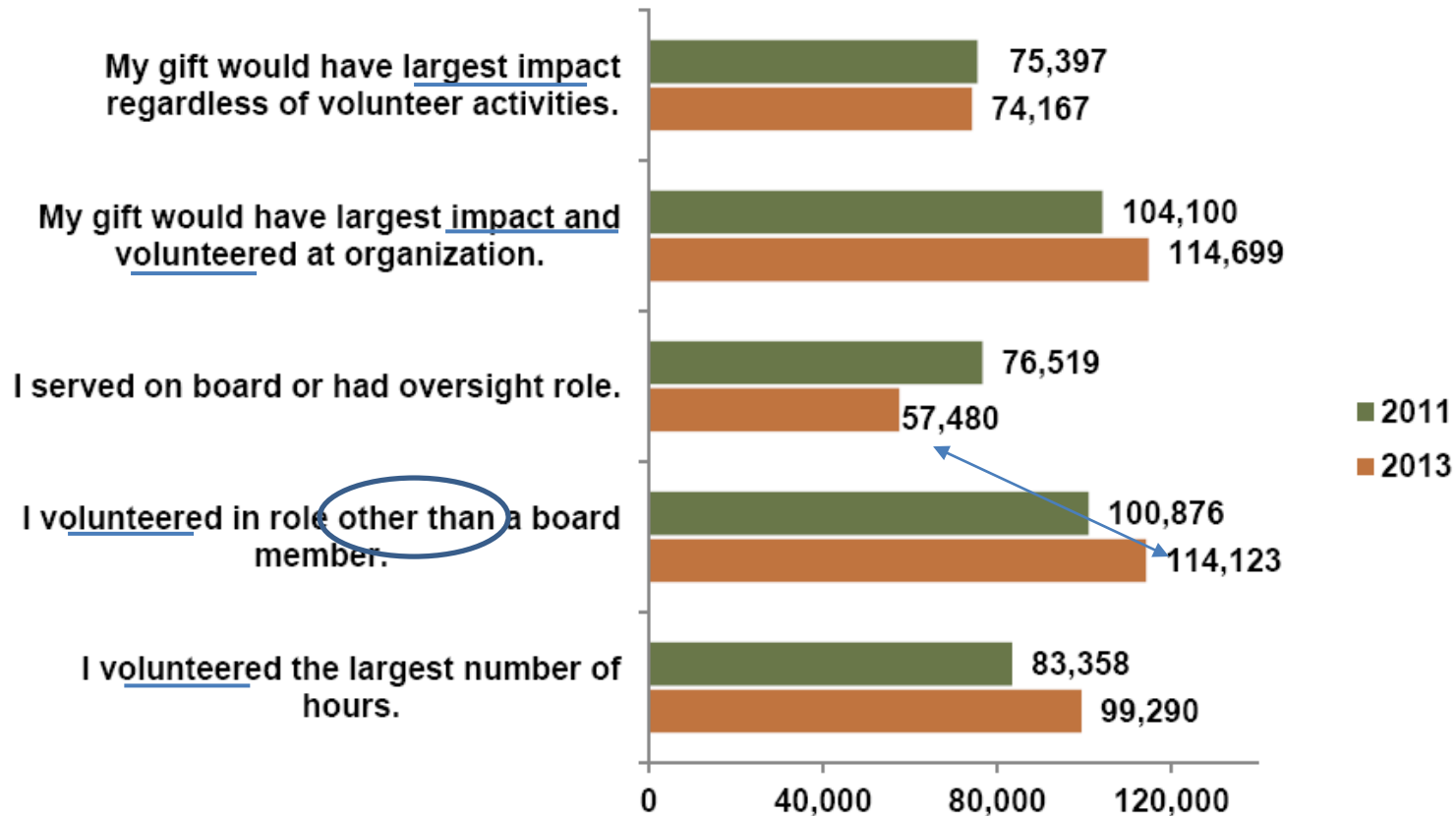
# AVERAGE GIVING BY VOLUNTEER STATUS



Source: 2014 US Trust Study of High Net Worth Philanthropy

# DETERMINING WHERE TO GIVE MORE

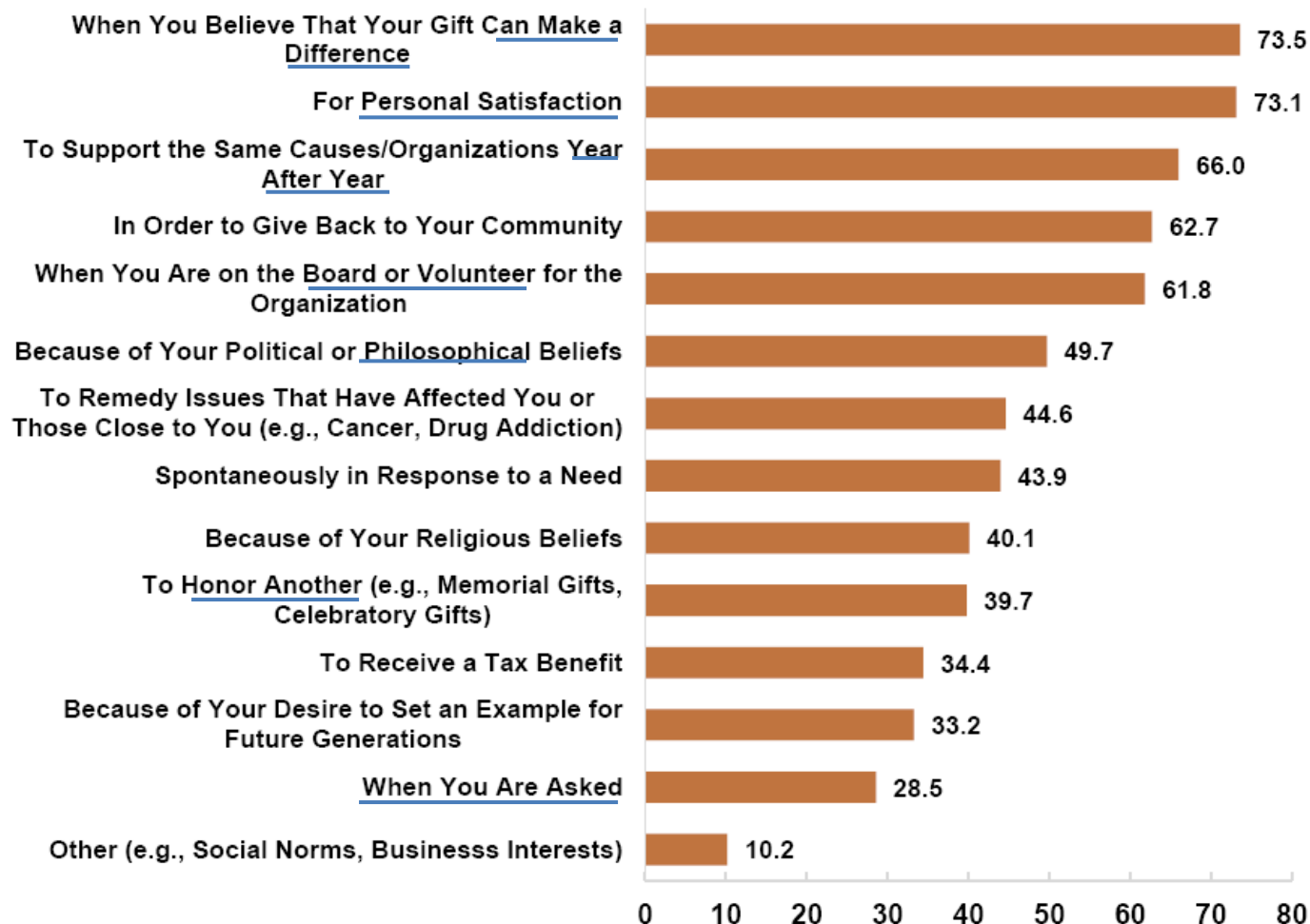
*"If you volunteered in 2013, please indicate whether the following statements are true or false. I gave more to organization(s) where . . . "*



Source: 2014 US Trust Study of High Net Worth Philanthropy



# GIVING MOTIVATION



Source: 2014 US Trust Study of High Net Worth Philanthropy



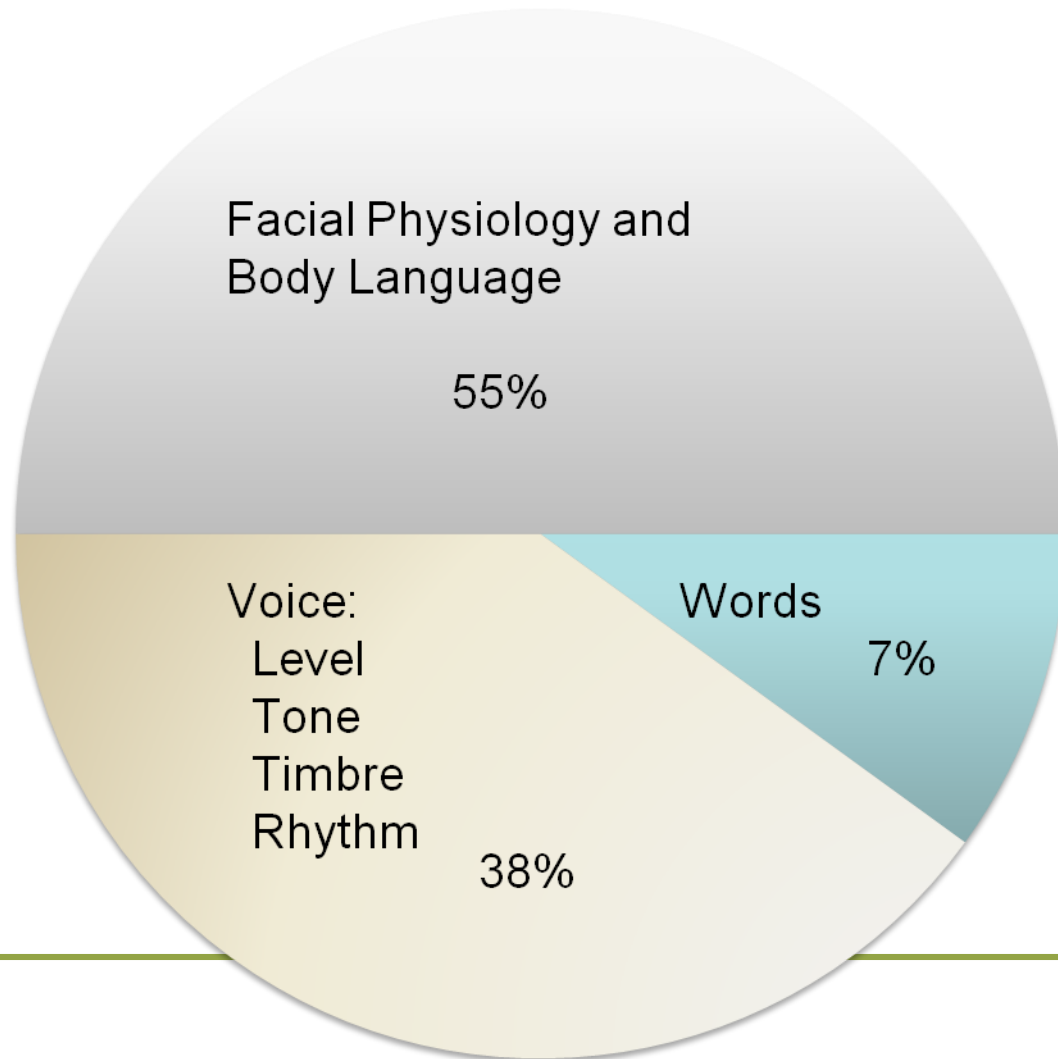
Building  
Rapport  
With Donors

# What is rapport



- **Rapport** is one of the most important features or characteristics of *unconscious* human interaction.
- It is commonality of perspective, being in "sync," being on the same "wavelength" as the person with whom you are talking.
- Rapport is the feeling of harmonious connection between people or groups of people.
- Techniques to build rapport include: matching and mirroring your body language, voice tone and volume, active listening, descriptive language.
- Everything we encounter is channeled and processed through our **five senses**. *What is your code?*
- Rapport techniques can be learned and applied intentionally to increase relationship success.

# Rapport Complexities



# Non-verbal Communication

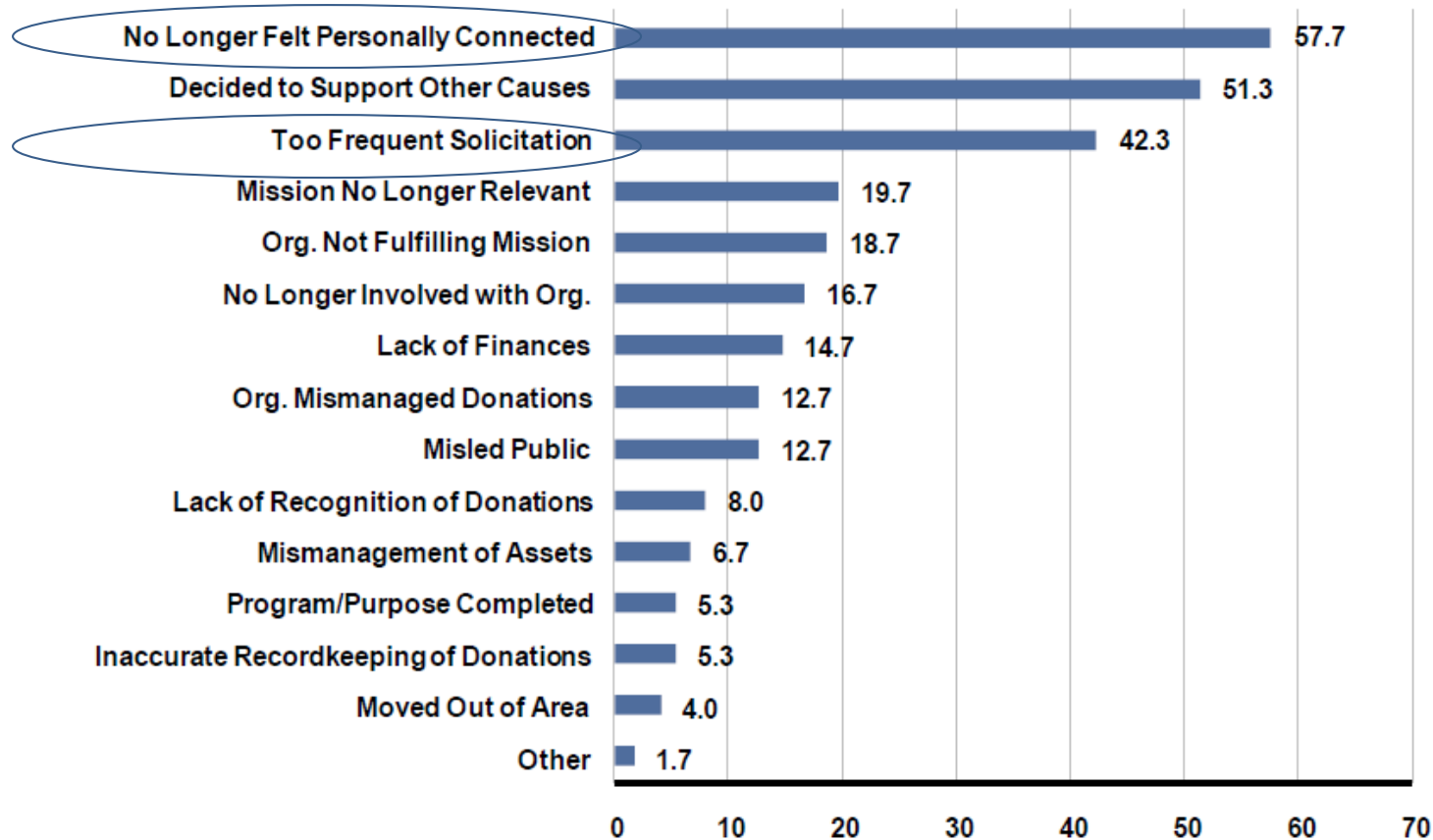




# WHY WE LOSE DONORS

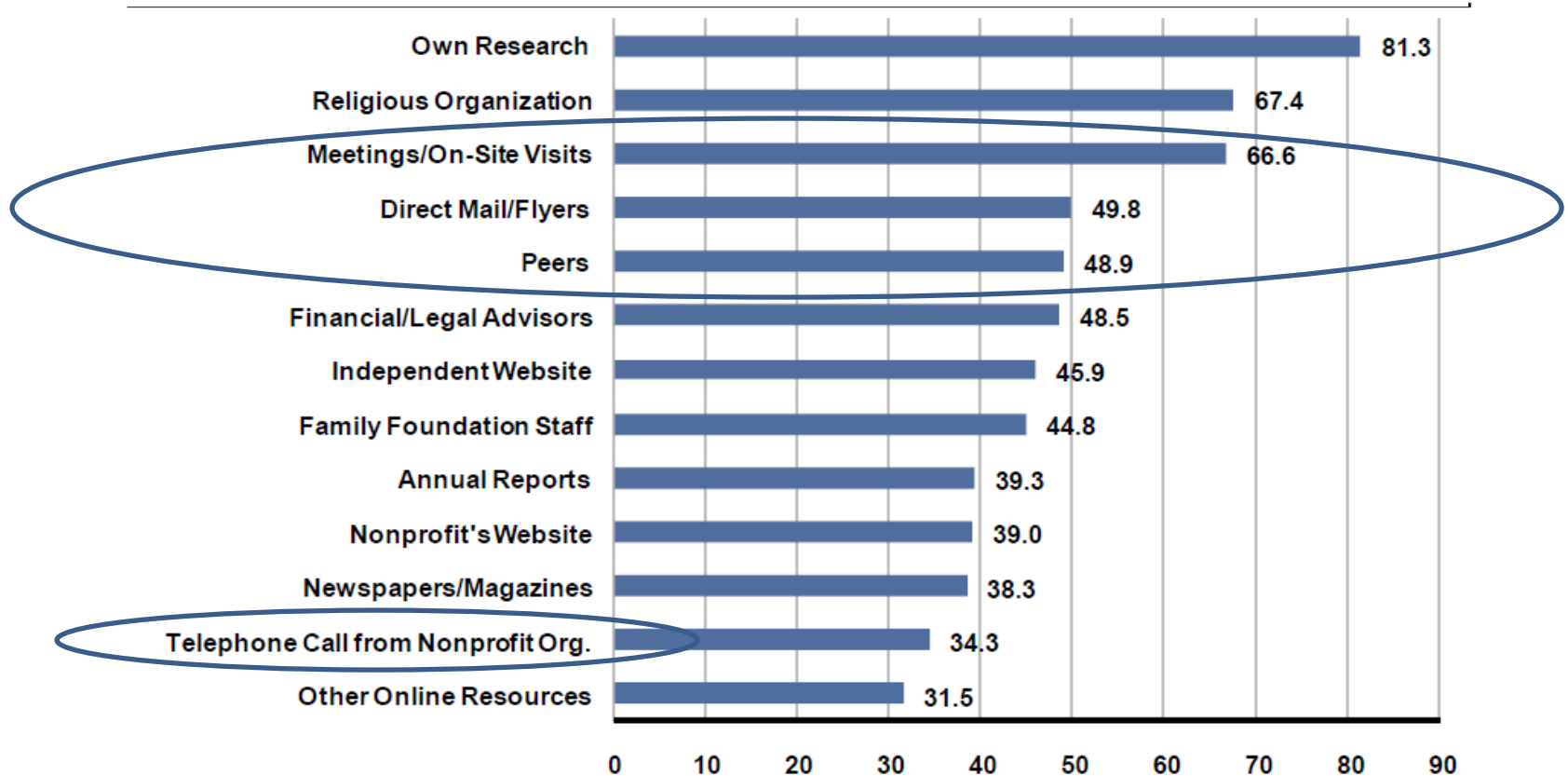
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## Reasons Why HNWHs Stopped Supporting the Organization(s) They Previously Supported (%)



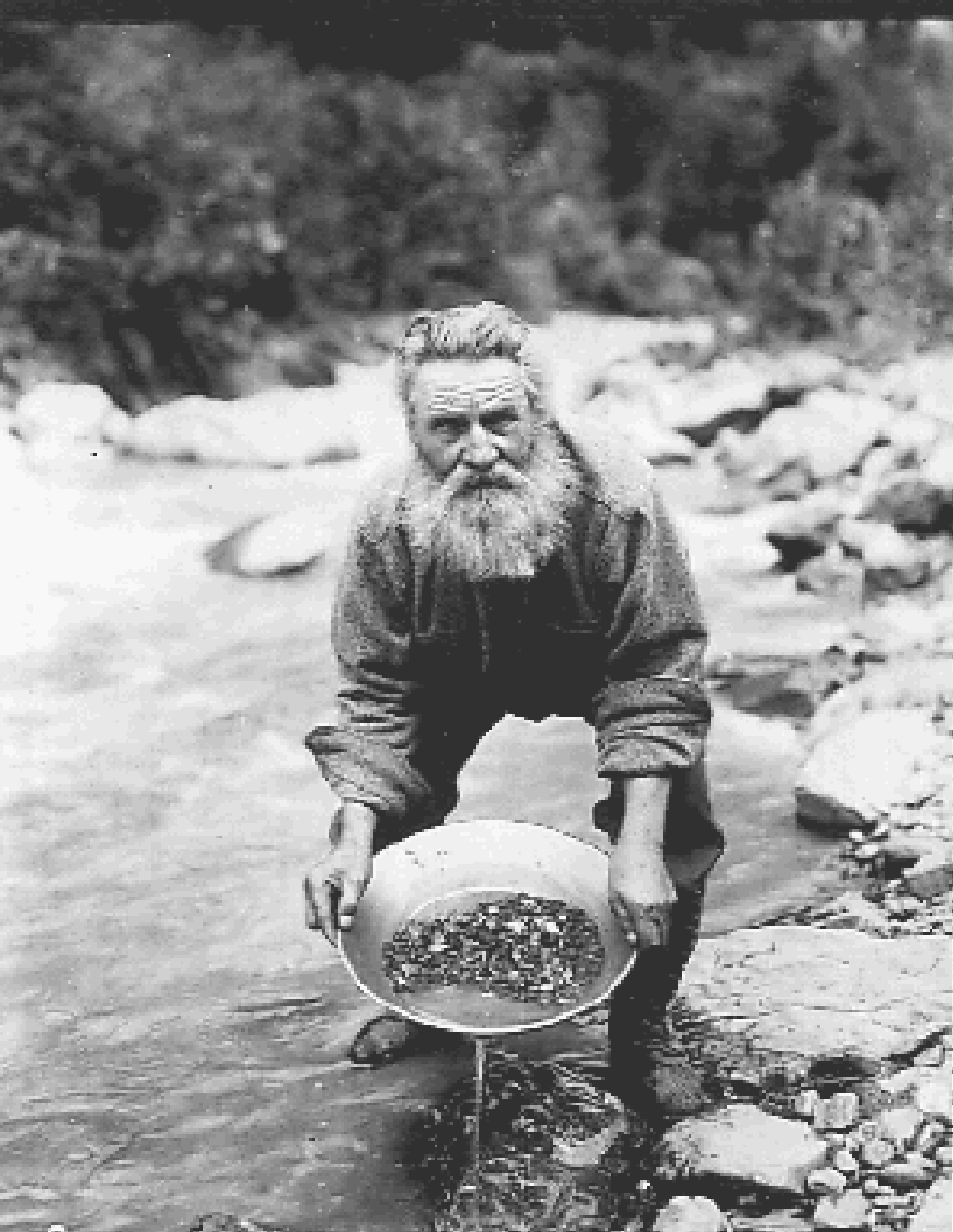
Source: 2014 US Trust Study of High Net Worth Philanthropy

## Where HNWHs Get Their Information About Nonprofit Organizations by Primary Sources (%)



Source: 2014 US Trust Study of High Net Worth Philanthropy





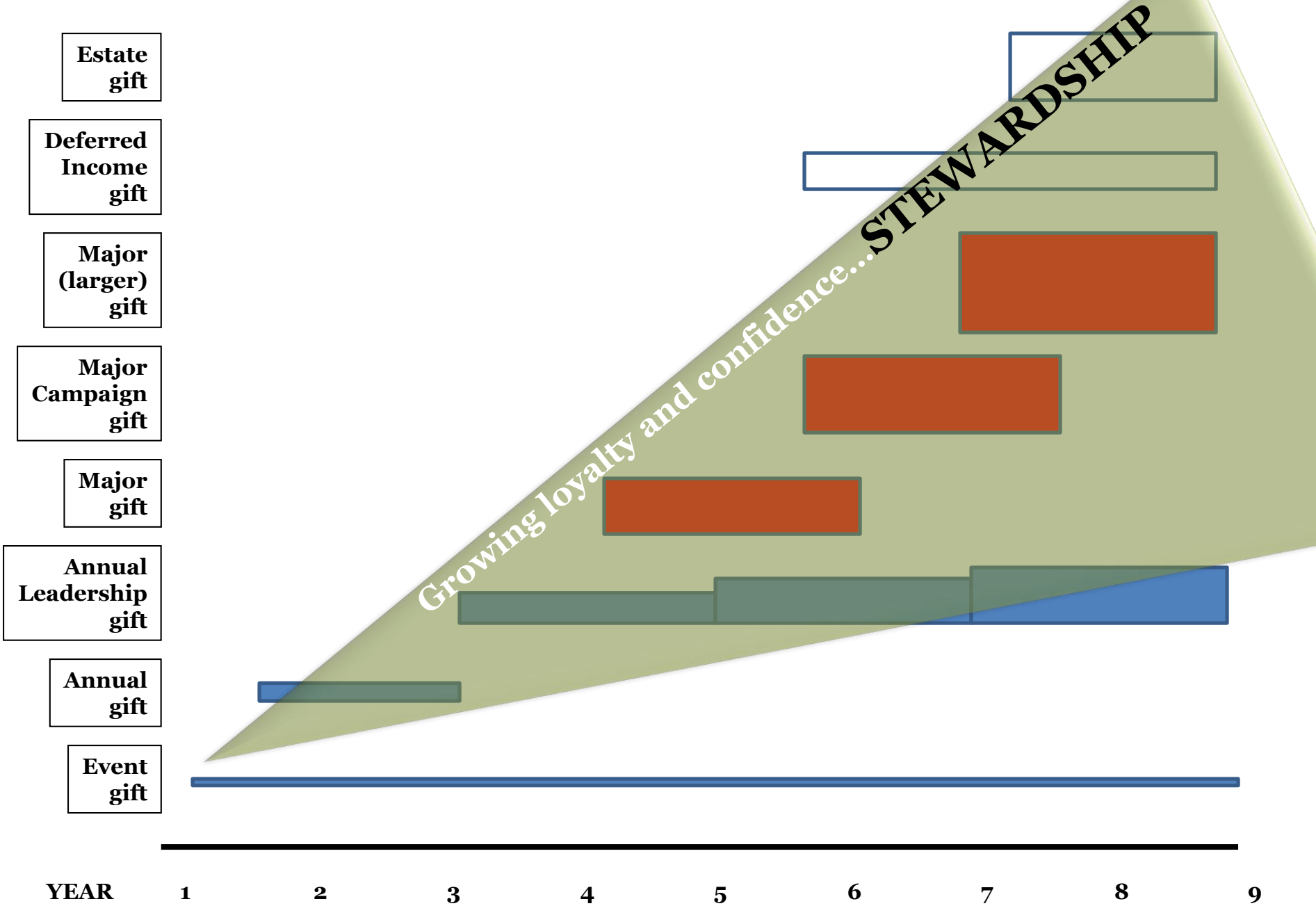
# Building your Major Gift Pipeline

# Most productive strategy

Prospect Type	Lead Time	Average # Steps (including Ask)	Average Amount
Development ID (research)	5.7 months	3 steps	\$49,000
Board Connected	6.9 months	2 steps	\$242,000
Physician identified	2.9 months	2 steps	\$455,000

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Source: Virginia Mason Foundation



## Donor Lifetime Value



Story  
Time



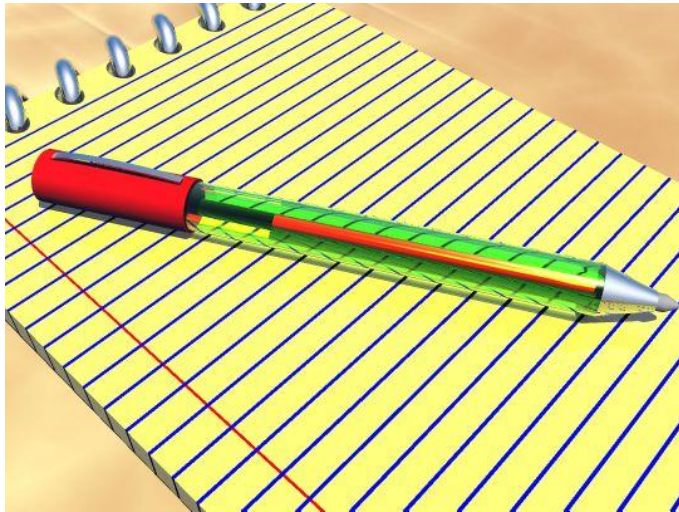
# Hallucinations

*Make your own*

*Worrying is the misuse of imagination*



## Build prospect screening lists



Key metrics/characteristics include:

- Loyal donors / many gifts / direct mail
- Total giving
- High average gift
- High one-time gift
- Researched capacity
- Philanthropic behavior
- Large political donor
- Known to believe in mission

# Quality of relationships

SCREENER NAME: \_\_\_\_\_

**WILLIAM SHATNER**

New Haven

1 2 **3** 4

**K. D. LANG**

Bridgeport

1 **2** 3 4

**TOM BRADY**

Hartford

**1** 2 3 4

**LAWRENCE O'DONNELL**

Danbury

1 **2** 3 4

**RACHEL MADDOW**

Bridgeport

1 **2** 3 **4**

1=willing to write note on invitation 2=willing to invite to lunch 3=willing to invite to dinner with CEO  
4=recommend for greater campaign involvement CIRCLE ALL THAT APPLY

# Building the Map

FIRSTNAME	SPOUSE	LASTNAME	COMPANY	Giving Capacity Major giving capacity	Annie Bass	JoAnn Brand-Hoertel	Mary Graham	Kathy Nickerson	Edward Downey	Dwight Look	Lonna Sowers	Ellis Hawkins	Ted Day
John		Allen			4	4		0		4			
Henry	Laura	Antolak			3			0		4		3	
		Auxiliary						4	3			3	
Daniel	Carol	Babcock		\$10,001 - \$25,000	1		1	1		3			
Emily		Barnes		\$10,001 - \$25,000	2	1		2		3			
James	Annie	Bass		\$50,001 - \$100,000		4	3	0	2	3	4	3	1
John	Cindy	Beger			4	4	3	4	2	3	3	4	3
Illa		Bell			3			1		2		3	
Harold		Bennish		\$25,001 - \$50,000	3			0		1		2	
Joe	Cathy	Bond			3	1	3	4	3	3	4	4	
Charles	Mary	Boone		\$10,001 - \$25,000		1	3	0				3	
Glenna	Jack	Boone			2	1		0		3		3	



# Relationship Map

<b>WILLIAM SHATNER</b>  <hr/> <b>Prospect for:</b> Relationship manager: <b>Jack</b>		ANNIE 1	LOURDES JC 3 JUSTO FANJUL 3 LIANA DE MENA 3	
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<b>TOM BRADY</b>  <hr/> <b>Prospect for:</b> Relationship manager: <b>Jack</b>		JAMIE 3 SEAN 2 CHRISTOPHER 4	JUSTO FANJUL 1 JAMIE 3	
--------------------------------------------------------------------------------------------	--	------------------------------------	---------------------------	--

<b>RACHEL MADDOW</b>  <hr/> <b>Prospect for:</b> Relationship manager: <b>Tom</b>		BILL 1	LIANA DE MENA 3 BILLY BALDWIN 2 KRISTINE WENZEL 1	
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# Relationships are the Key to expanding your short list of Prospects



- Always have a list of potential prospects on your mind
- Believe in 6 degrees of separation to your target
- At every opportunity, ask about a connection to the “suspect” from the volunteer / donor / board member if they know someone on the list
- *Find the connection...it's fun*

# Story Time



"If you do not know where you are going,  
you might wind up somewhere else."

## Truism 3



Yogi Bear

## Relationship objectives

1. Increase involvement through the finance committee
2. Invite onto the community advisory committee
3. Introduce to the NPO president with known board member
4. Secure a gift in range of \$25,000 - \$50,000
5. Continue strong stewardship
6. Possibly eventual board membership



## Written tactics



- Tactics are constructed with at least **one move/month**.
- Each monthly move includes clearly articulated outcome objectives and **documented key conversation and EQ points**.
- **Target ask amounts** are determined by input from the gift officer and the prospect researcher and other colleagues.

# Major Donor Tracker

	RELATIONSHIP OBJECTIVE	VOLUNTEER	GIFT GOAL	GIFT ASK AMT	APRIL 2016	MAY	JUNE	JULY	AUGUST	SEPTEMBER	OCTOBER
RELATIONSHIP / MOVES MANAGER #1											
SAM ADAMS	Feed his interest in SPED EDUCATION	Paul Revere	\$ 35,000	\$ 50,000	Discovery visit	Meeting @ home/office; tour; meet with content expert; meal with volunteer; invitation to event	Meeting @ home/office; tour; meet with content expert; meal with volunteer; invitation to event		Meeting to discuss gift	Follow-up as needed	
DENNIS LEARY	Secure his involvement with the burn center ranging from spokesperson to campaign or raffle chair	Sally Flame	\$ 100,000	\$ 150,000		Discovery visit	Meeting @ home/office; tour; meet with content expert; meal with volunteer; invitation to event	Meeting @ home/office; tour; meet with content expert; meal with volunteer; invitation to event		Meeting to discuss gift	Follow-up as needed

## ON DECK

	RELATIONSHIP / MOVES MANAGER	RELATIONSHIP OBJECTIVE	FEB	MARCH	APRIL	MAY	JUNE	JULY	AUGUST	SEPTEMBER
ON DECK										
Prospect #1		High Touch Mail	Bonding Call		Mail		Newsletter			Mail
Prospect #2		High Touch Mail	Bonding Call		Mail		Newsletter			Mail
Prospect #3		High Touch Mail	Bonding Call		Mail		Newsletter			Mail
Prospect #4		High Touch Mail	Bonding Call		Mail		Newsletter			Mail
Prospect #5		High Touch Mail	Bonding Call		Mail		Newsletter			Mail
Prospect #6		High Touch Mail	Bonding Call		Mail		Newsletter			Mail
Prospect #7		High Touch Mail	Bonding Call		Mail		Newsletter			Mail

Strategy was on the whole successful

Strategy was not successful but progress was made on overall strategy

Strategy was not successful or delayed; future strategies may need adjustment

# Institutional Donor Tracker

PROSPECT	RELATIONSHIP MANAGER	RELATIONSHIP OBJECTIVE	VOLUNTEER	GIFT GOAL	GIFT ASK AMT	APRIL	MAY	JUNE
FOUNDATION A	DIRECTOR INSTITUTIONAL GIVING	contact program officer and explore interest in community health assessments	JANE			Speak with program officer	write proposal, have reviewed by PERSON'S NAME	gather letters of support
FOUNDATION B	DIRECTOR INSTITUTIONAL GIVING	contact program officer and explore interest in Children First program	REBEKAH			Speak with program officer	write proposal, have reviewed by PERSON'S NAME	gather letters of support, write proposal, have reviewed by PERSON'S NAME
FOUNDATION C	DIRECTOR INSTITUTIONAL GIVING	contact program officer and explore interest in community health assessments	DONNA			Speak with program officer	write proposal, have reviewed by PERSON'S NAME	gather letters of support
FOUNDATION D	DIRECTOR INSTITUTIONAL GIVING	contact program officer and explore interest in Children First program	JANE			Speak with program officer	write proposal, have reviewed by PERSON'S NAME	gather letters of support
CORP A	DIRECTOR INSTITUTIONAL GIVING	Find someone with relationship with key person and explore interest in burn center campaign	HARRY			find personal linkage to corp decision maker	find personal linkage to corp decision maker	Secure meeting with decision maker
CORP B	DIRECTOR INSTITUTIONAL GIVING	Contact Bob Smith and explore interest in sponsorship of gala	TOM			Ask Bob Smith for help getting meeting with Corp B	Bob Smith assist in securing meeting with decision maker	Hold meeting and determine philanthropic interests
CORP C	DIRECTOR INSTITUTIONAL GIVING	Contact Sally Miller and explore interest in sponsorship of golf tournament	DICK					
CORP D	DIRECTOR INSTITUTIONAL GIVING	Contact Barbara Morgan and explore interest in naming neonatal unit.	HAROLD					

Strategy was on the whole successful

Strategy was not successful but progress was made on overall strategy

Strategy was not successful or delayed; future strategies may need adjustment



# Annual / Special Groups Tracker

PROSPECT	RELATIONSHIP MANAGER	RELATIONSHIP OBJECTIVE	APRIL	MAY	JUNE	JULY
HIGH TOUCH MAIL GROUP	DIRECTOR ANNUAL GIVING	MAIL 3X/year with 2 followups	Mail Theme A	Follow up		Mail Theme B
PLANNED GIFT PROSPECTS	DIRECTOR PLANNED GIVING	Set up strategies for at least 20 PG prospects	Build screening list	Screen list with volunteers and MDs	Screen list with volunteers and MDs	reach out to top 30 and set discovery meetings
MAIL						
DONORS < \$100	DIRECTOR ANNUAL GIVING	Convert 70% and renew 90%	Mail	Mail follow up		
LAPSED DONORS (24 months)	DIRECTOR ANNUAL GIVING	Reinstate 10% as donors	Mail			
ACQUISITION MAIL	DIRECTOR ANNUAL GIVING	Achieve 1% response rate and \$30 ave gift				
GIVING SOCIETY LEVEL A	DIRECTOR ANNUAL GIVING	Step up 20% of A to B level	Mail	Mail follow up		
GIVING SOCIETY LEVEL B	DIRECTOR ANNUAL GIVING	Step up 20% of B to C level	Mail	Mail follow up		
GIVING SOCIETY LEVEL C (HIGH TOUCH)	DIRECTOR ANNUAL GIVING	Step up 20% from C to Pres Society	Mail	Mail follow up		
PRESIDENTS SOCIETY (HIGH TOUCH)	DIRECTOR ANNUAL GIVING	Increase average gift of PS gifts 10%	Mail	Mail follow up	Phone follow-up	
EMPLOYEES	DIRECTOR ANNUAL GIVING	Hold employee giving campaign to achieve 40% participation	secure staff leadership gifts	organize leadership solicitation teams; communicate to staff	launch campaign	Mail follow-up to non-donors

Strategy was on the whole successful

Strategy was not successful but progress was made on overall strategy

Strategy was not successful or delayed; future strategies may need adjustment

# Stewardship Tracker

PROSPECT	RELATIONSHIP MANAGER	STRATEGY OBJECTIVE	VOLUNTEER	APRIL	MAY
SAM ADAMS	MANAGER #1			NEWSLETTER	PRESIDENT'S LETTER
DENNIS LEARY	MANAGER #1			NEWSLETTER	PRESIDENT'S LETTER
JANE SMITH	MANAGER #1			NEWSLETTER	PRESIDENT'S LETTER
ERNIE BANKS	MANAGER #2			NEWSLETTER	PRESIDENT'S LETTER
RAHM EMANUEL	MANAGER #2			NEWSLETTER	PRESIDENT'S LETTER
FOUNDATION A	DIRECTOR INSTITUTIONAL GIVING			NEWSLETTER	
FOUNDATION B	DIRECTOR INSTITUTIONAL GIVING			NEWSLETTER	
FOUNDATION C	DIRECTOR INSTITUTIONAL GIVING			NEWSLETTER	
FOUNDATION D	DIRECTOR INSTITUTIONAL GIVING			NEWSLETTER	
CORP A	DIRECTOR INSTITUTIONAL GIVING			NEWSLETTER	
CORP B	DIRECTOR INSTITUTIONAL GIVING			NEWSLETTER	
CORP C	DIRECTOR INSTITUTIONAL GIVING			NEWSLETTER	
CORP D	DIRECTOR INSTITUTIONAL GIVING			NEWSLETTER	
MG PIPELINE ON DECK	DIRECTOR PROSPECT MANAGEMENT			NEWSLETTER	PRESIDENT'S LETTER
HIGH TOUCH MAIL GROUP	DIRECTOR ANNUAL GIVING			NEWSLETTER	PRESIDENT'S LETTER
PLANNED GIFT PROSPECTS	DIRECTOR PLANNED GIVING			NEWSLETTER	PRESIDENT'S LETTER
EMPLOYEES	DIRECTOR ANNUAL GIVING			NEWSLETTER	
PHYSICIANS	CAO			NEWSLETTER	PRESIDENT'S LETTER
TRUSTEES	CAO			NEWSLETTER	PRESIDENT'S LETTER
DONORS < \$100	DIRECTOR ANNUAL GIVING			NEWSLETTER	
LAPSED DONORS (24 months)	DIRECTOR ANNUAL GIVING			NEWSLETTER	
ACQUISITION MAIL	DIRECTOR ANNUAL GIVING			NEWSLETTER	
GIVING SOCIETY LEVEL A	DIRECTOR ANNUAL GIVING			NEWSLETTER	
GIVING SOCIETY LEVEL B	DIRECTOR ANNUAL GIVING			NEWSLETTER	
GIVING SOCIETY LEVEL C	DIRECTOR ANNUAL GIVING			NEWSLETTER	
PRESIDENTS SOCIETY	DIRECTOR ANNUAL GIVING			NEWSLETTER	PRESIDENT'S LETTER

# Measuring progress – Major Giving

	APRIL	MAY	JUNE	JULY
<b>RELATIONSHIP MGR #1</b>				
DISCOVERY VISITS MADE	<b>4</b>	<b>6</b>	<b>7</b>	
PROSPECTS WITH OBJECTIVES	20	25	23	
PROSPECTS AWAITING OBJECTIVES	10	5	7	
CURRENT TACTICS IN PLAY	20	20	18	
ASKS MADE	3	5	7	
NUMBER OF GIFTS/PLEDGES MADE	2	5	6	
REVENUE SECURED	\$ 100,000	\$ 350,000	\$ 500,000	
AVERAGE REVENUE / GIFT OR PLEDGE	\$ 50,000	\$ 70,000	\$ 83,333	
DECLINES	1	0	1	
# ASKS ANTICIPATED NEXT MONTH	5	7	9	
TOTAL VALUE OF ASKS FOR NEXT MONTH	\$ 375,000	\$ 525,000	\$ 675,000	
NUMBER ON DECK	22	25	35	
REMOVED FROM PIPELINE	5	4	6	
NEW/UPDATED STRATEGIES STARTED	2	3	4	
CONTACT REPORTS WRITTEN IN RE	24	26	25	
GREEN CELLS	15	17	14	
YELLOW CELLS	3	3	3	
RED CELLS	2	0	1	

# Measuring progress - Stewardship

STEWARDSHIP PERFORMANCE			
	APRIL	MAY	JUNE
RELATIONSHIP MGR #1			
DONOR ACKNOWLEDGED FOR GIFT			
DONOR WITH STEWARDSHIP OBJECTIVES			
DONOR AWAITING OBJECTIVES			
CURRENT STEWARDSHIP TACTICS IN PLAY			
ADDITIONAL RECOGNITION/THANKS MADE			
EVENT ATTENDED			
UNSOLICITED GIFTS REALIZED			
DONOR MOVED TO GIFT PIPELINE TRACKER			
REMOVED FROM STEWARDSHIP AND PIPELINE			
NEW/UPDATED STRATEGIES STARTED			
CONTACT REPORTS WRITTEN IN RE			
GREEN CELLS			
YELLOW CELLS			
RED CELLS			

## Case #1

Age (male):	55
Age (female):	55
Retired:	NO
Total given to org.:	\$ 15,000
Total # gifts to org.:	8
Average gift:	\$ 1,875
Largest cash gift:	\$ 5,000
Largest known gift to another org.:	\$ 15,000
Philanthropy capacity estimate (bottom of range):	\$ 50,000
Serves on the board:	NO
Serves on a committee:	NO
Former board member:	YES
Serves on other boards:	YES
Has close relationship with a board member:	YES
Attends org's fund raising events:	YES
Has made an estate gift/intention:	NO
Made memorial/tribute gifts to org:	YES
Has made in-kind gifts:	NO
Gift purpose consistent with stated interests:	YES
Has made "giving sounds":	YES
Has made "financial stress" comments:	NO
At least one solicitor is liked and respected by prospect:	YES



# Case #1

## 300+ Gift Officer Respondents

### GOAL

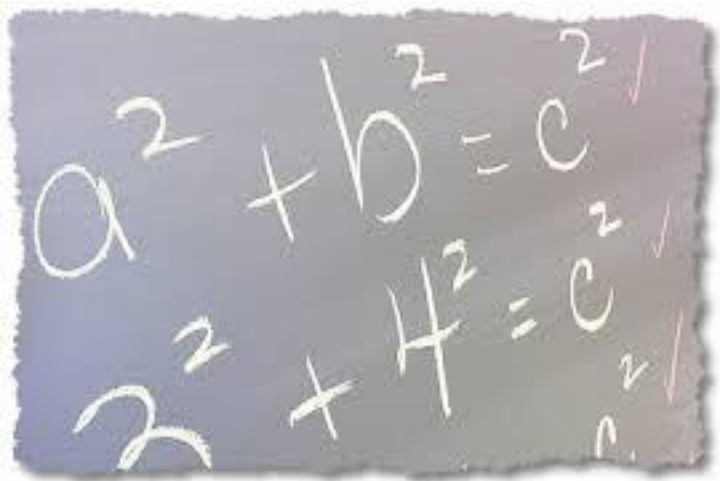
AVERAGE GOAL	\$ 46,797
MEDIAN GOAL	\$ 50,000
HIGH	\$ 120,000
LOW	\$ 15,000
RANGE	\$105,000

### ASK

AVERAGE ASK	\$ 68,226
MEDIAN ASK	\$ 70,000
HIGH	\$ 180,000
LOW	\$ 25,000
RANGE	\$ 155,000

# Most important variables

- Are they philanthropic or transactional
- Prospect's relationship with the solicitors
- Capacity
- Involvement with the organization
- Giving loyalty
- Giving to other organizations



## Case #2

Age (male):	75
Age (female):	75
Retired:	YES
Total given to org.:	\$ 150,000
Total # gifts to org.:	15
Average gift:	\$ 10,000
Largest cash gift:	\$ 25,000
Largest known gift to another org.:	\$ 50,000
Philanthropy capacity estimate (bottom of range):	\$ 150,000
Serves on the board:	YES
Serves on a committee:	YES
Former board member:	NO
Serves on other boards:	YES
Has close relationship with a board member:	YES
Attends org's fund raising events:	YES
Has made an estate gift/intention:	NO
Made memorial/tribute gifts to org:	NO
Has made in-kind gifts:	YES
Gift purpose consistent with stated interests:	YES
Has made "giving sounds":	YES
Has made "financial stress" comments:	NO
At least one solicitor is liked and respected by prospect:	YES





## Case #2

## 300+ Gift Officer Respondents

### GOAL

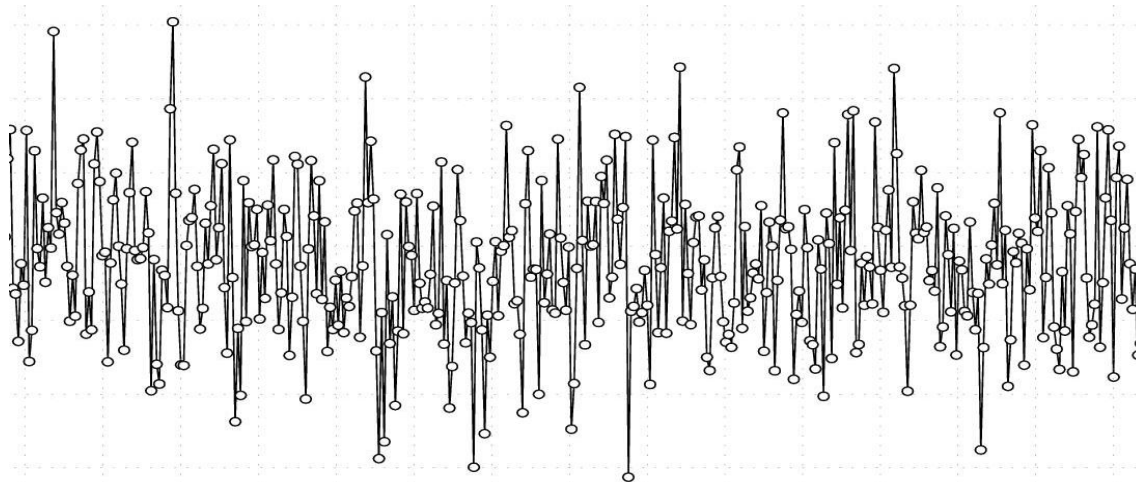
AVERAGE GOAL	\$ 308,036
MEDIAN GOAL	\$ 150,000
HIGH	\$ 2,000,000
LOW	\$ 50,000
RANGE	<i>\$ 1,950,000</i>

### ASK

AVERAGE ASK	\$ 444,107
MEDIAN ASK	\$ 275,000
HIGH	\$ 3,000,000
LOW	\$ 50,000
RANGE	<i>\$ 2,950,000</i>

## Why the wide variability

1. Gift officers have different personal relationships to money
2. Professional experience on low or high end of gift spectrum
3. Organization self-esteem and history of gifts
4. Size of the initiative/campaign goal



# Wisdom of the crowd



1. Ask amount decision should be a team discussion
2. Include people with a variety of perspectives and experiences; lay and professional
3. Do not have analysis paralysis with the empirical data
4. The strength of personal relationships, affinity to the mission and capacity are key

# Doing Donors a Favor



## Remember...

1. You are a philanthropist talking to another philanthropist
2. Philanthropists want to invest wisely and seek a “return” on their investment
3. You KNOW this is a wise investment
4. You, as a trustee / gift officer, will help protect their investment (gift)
5. Getting a “NO” is not a reflection on you or the organization
6. Getting a “YES” is a reflection on you and the organization





Discussion