



## Lehigh Valley Philanthropy Institute

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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**



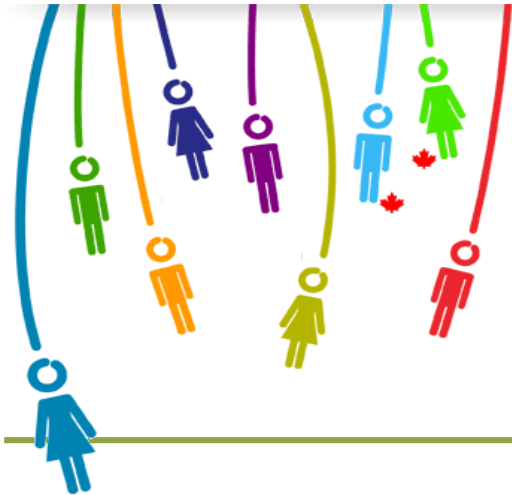
Eager

**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
- Introduction to powerful pipeline and relationship management tools



## Key principles

- 85% of success in fund raising is based on extraordinary relationship and rapport skills. *These are teachable.*
- Research pays off.
- The most important major gift marketing strategy is building relationship networks.
- Getting to yes may be a bumpy ride, so hang on.
- Cultivating people, not entities-- yields bigger results.



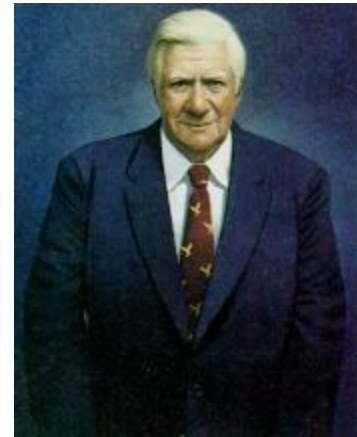
## Key Strategies

- Speaking to all styles: emotions and metrics make a compelling combination
- Creativity with gift strategies and structuring
- Empowering the donor to create life meaning through giving
- Matching gift vehicle to the motivation and behavioral style of the donor



# 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.

# Core Elements of a Strong Philanthropic Organization



- ✓ Mission
- ✓ Vision + Institutional Strategic Plan
- ✓ Case for Support
- ✓ Leadership – volunteers to advocate
- ✓ Stakeholders – sources of support
- ✓ Reputation – quality image
- ✓ Program Credibility – proven performance
- ✓ Financial Stability – strength and potential
- ✓ Fundraising program – staff, budget, plan
- ✓ Performance – results, success, accountability
- ✓ Stewardship of constituents – building lasting relationships



# Mission

Please write down the mission of your organization in **10 words**



## Larry's mission



To bring focus, accountability, creativity, passion and success to:

- Your philanthropy enterprise
- Raising the family
- Cooking dinner

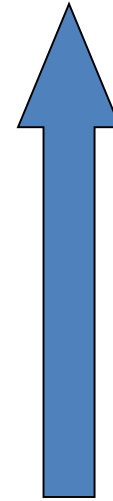
# Disconnect your biases

- 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



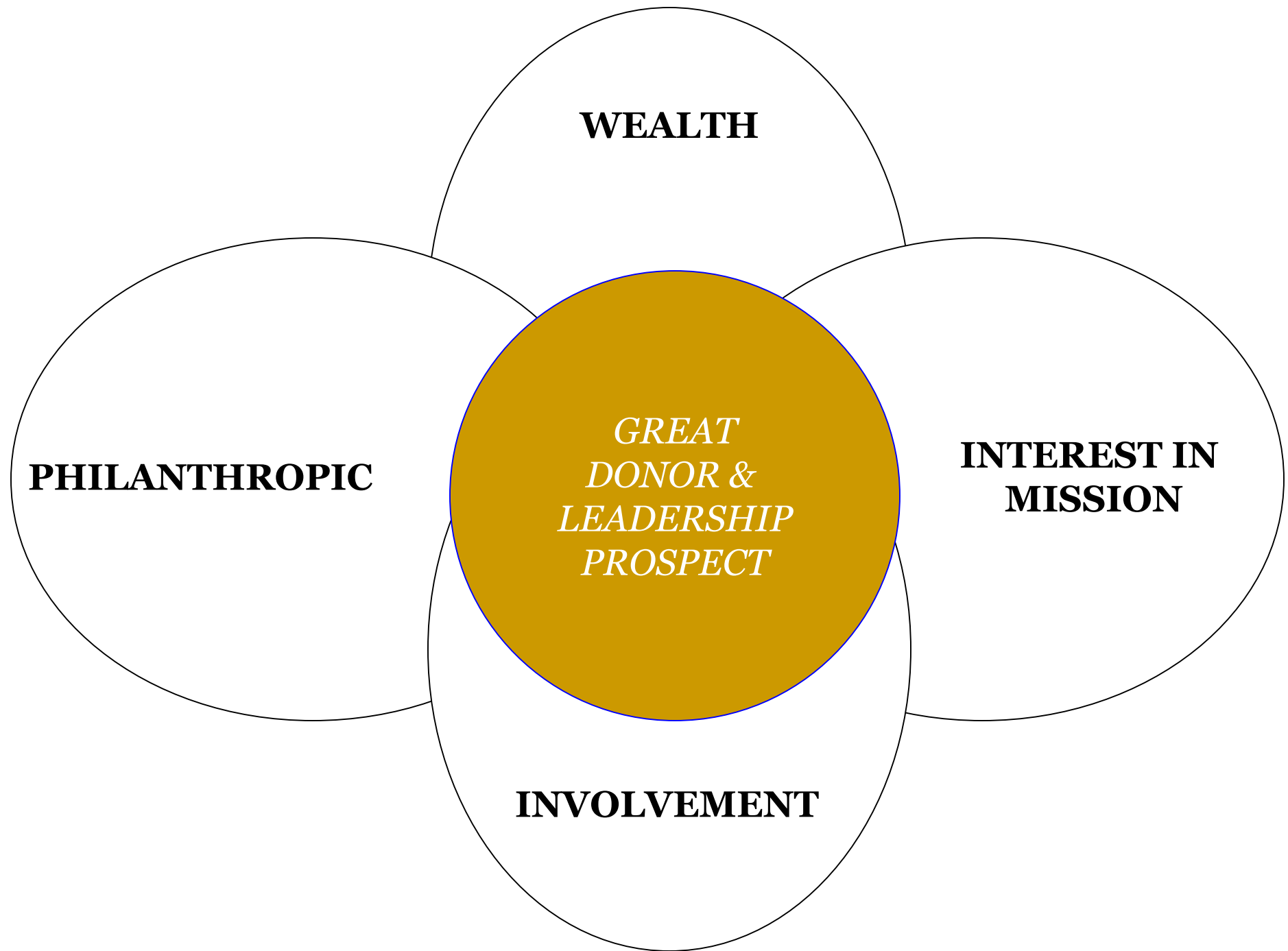
High “touch”



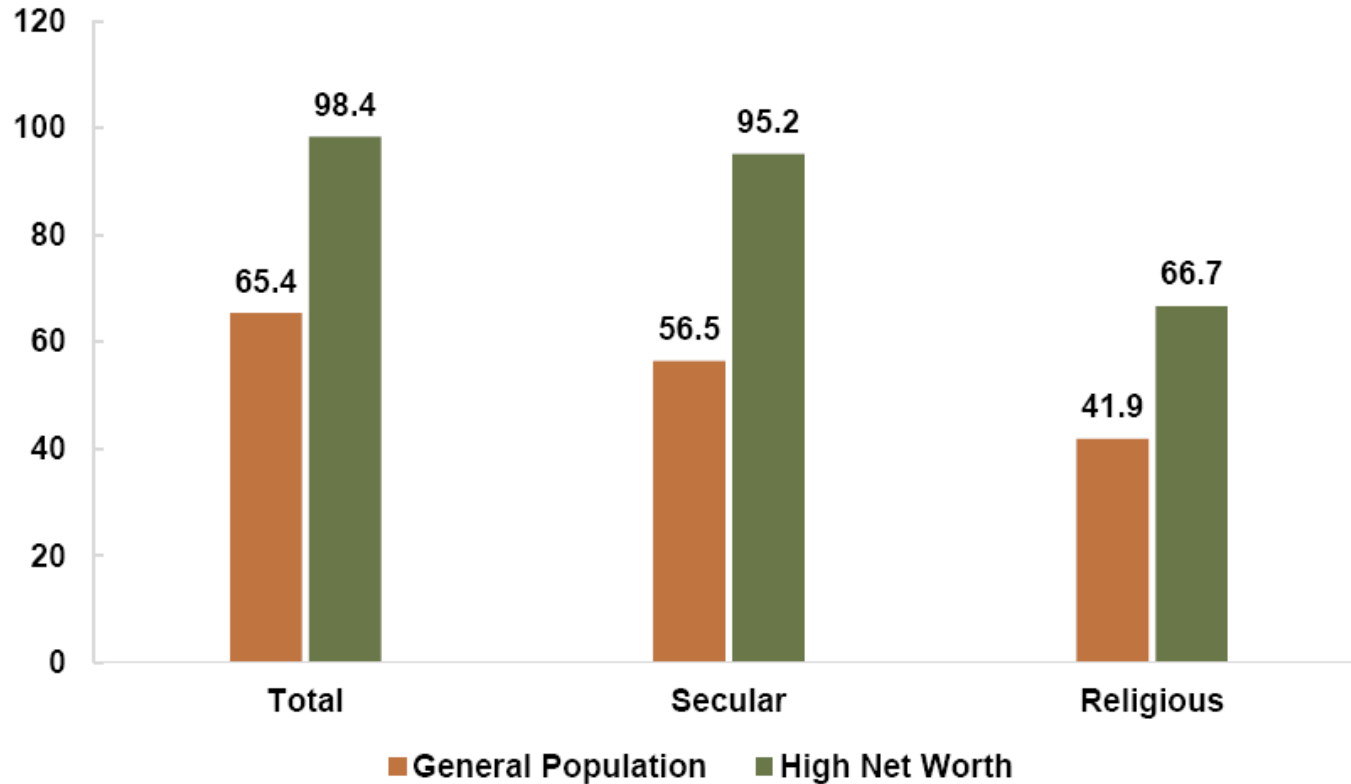


# The philanthropic behavior of high net worth households

Start with basic  
understanding



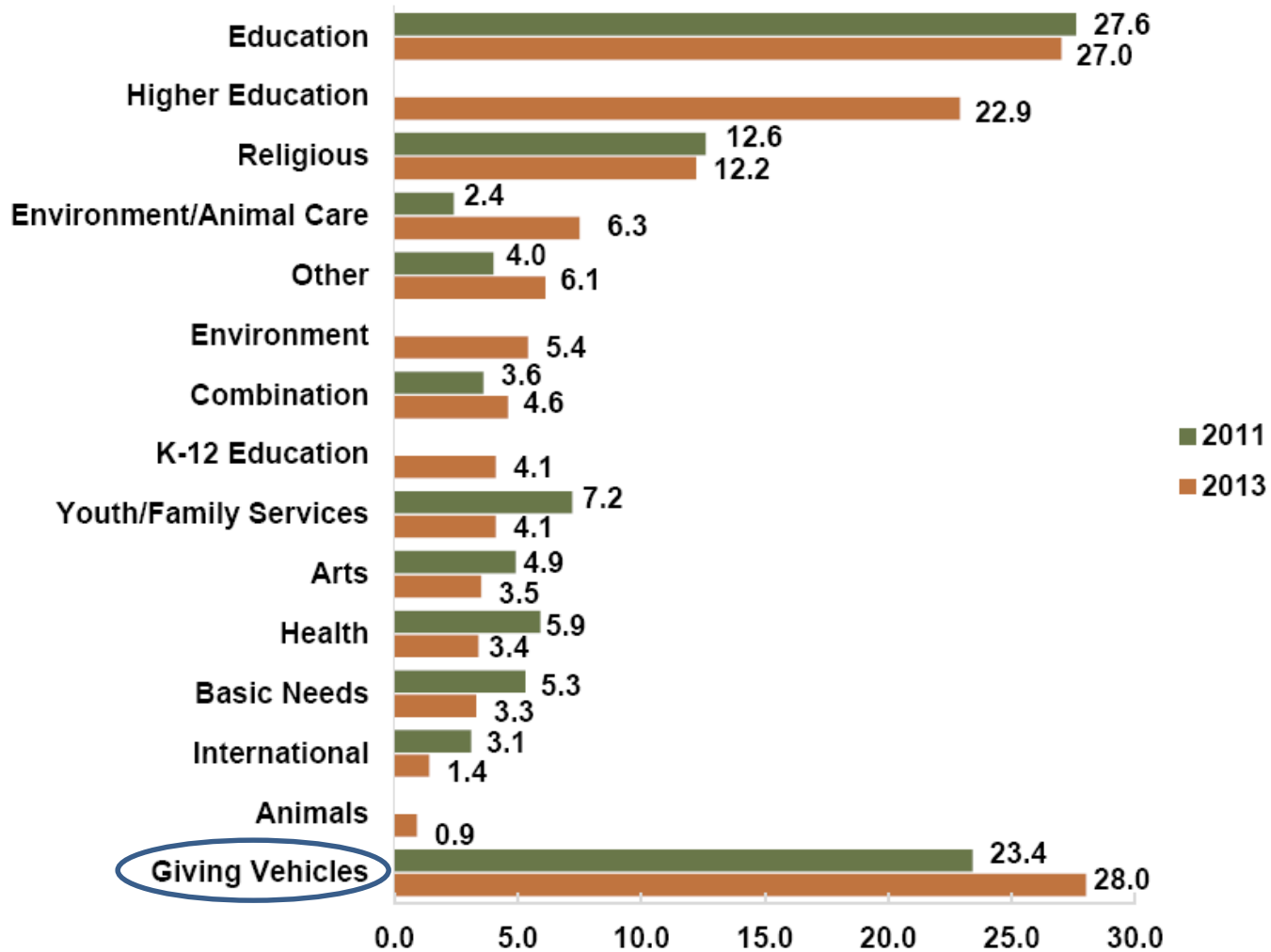
# RELIGIOUS VS SECULAR GIVING



^Source for the U.S. general population is the 2009 Center on Philanthropy Panel Study on giving in 2008, the latest year data is available on average giving by American households, available at [www.philanthropy.iupui.edu/research](http://www.philanthropy.iupui.edu/research).

Source: 2014 US Trust Study of High Net Worth Philanthropy

# GIVING TO SECTORS

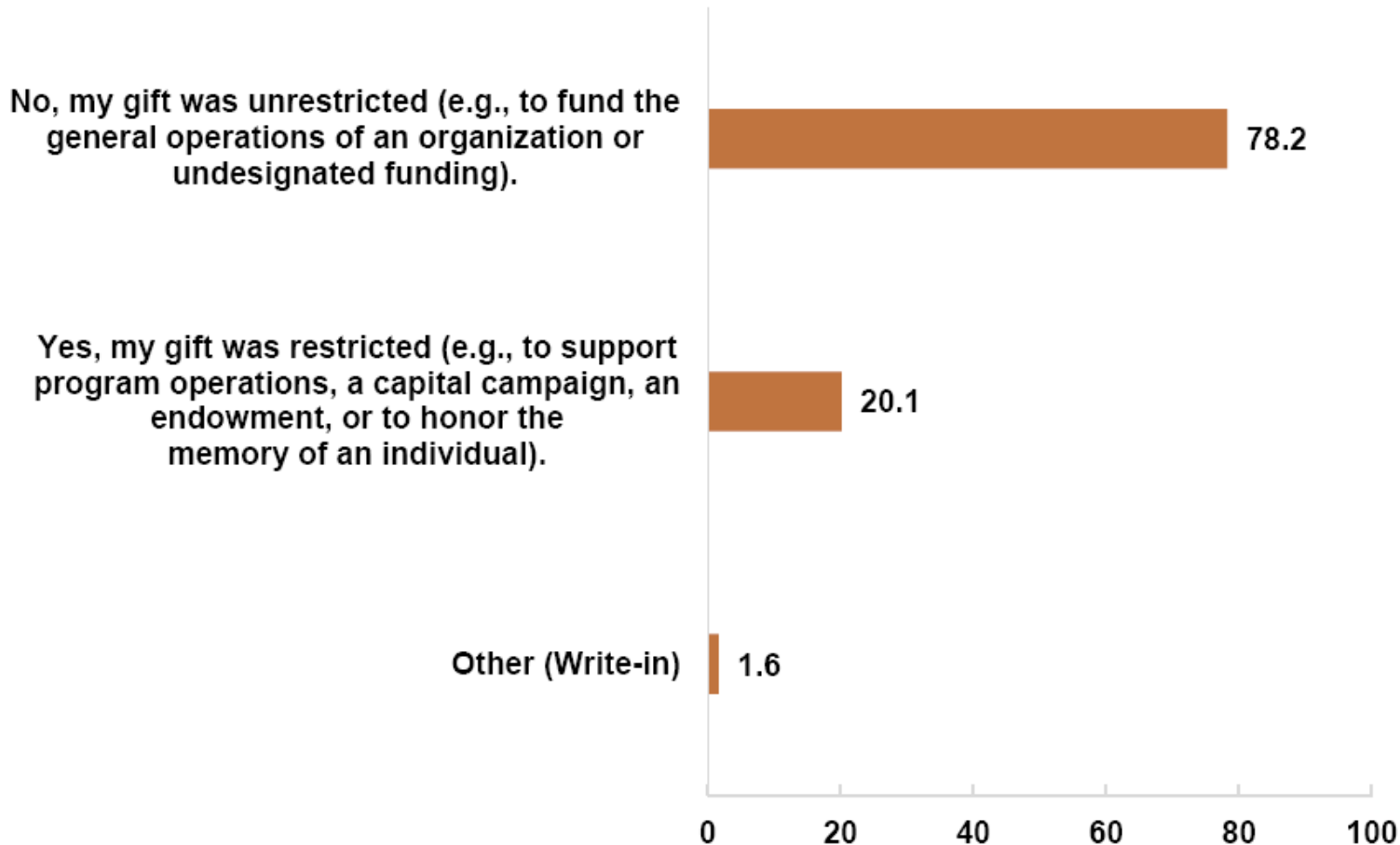


Source: 2014 US Trust Study of High Net Worth Philanthropy



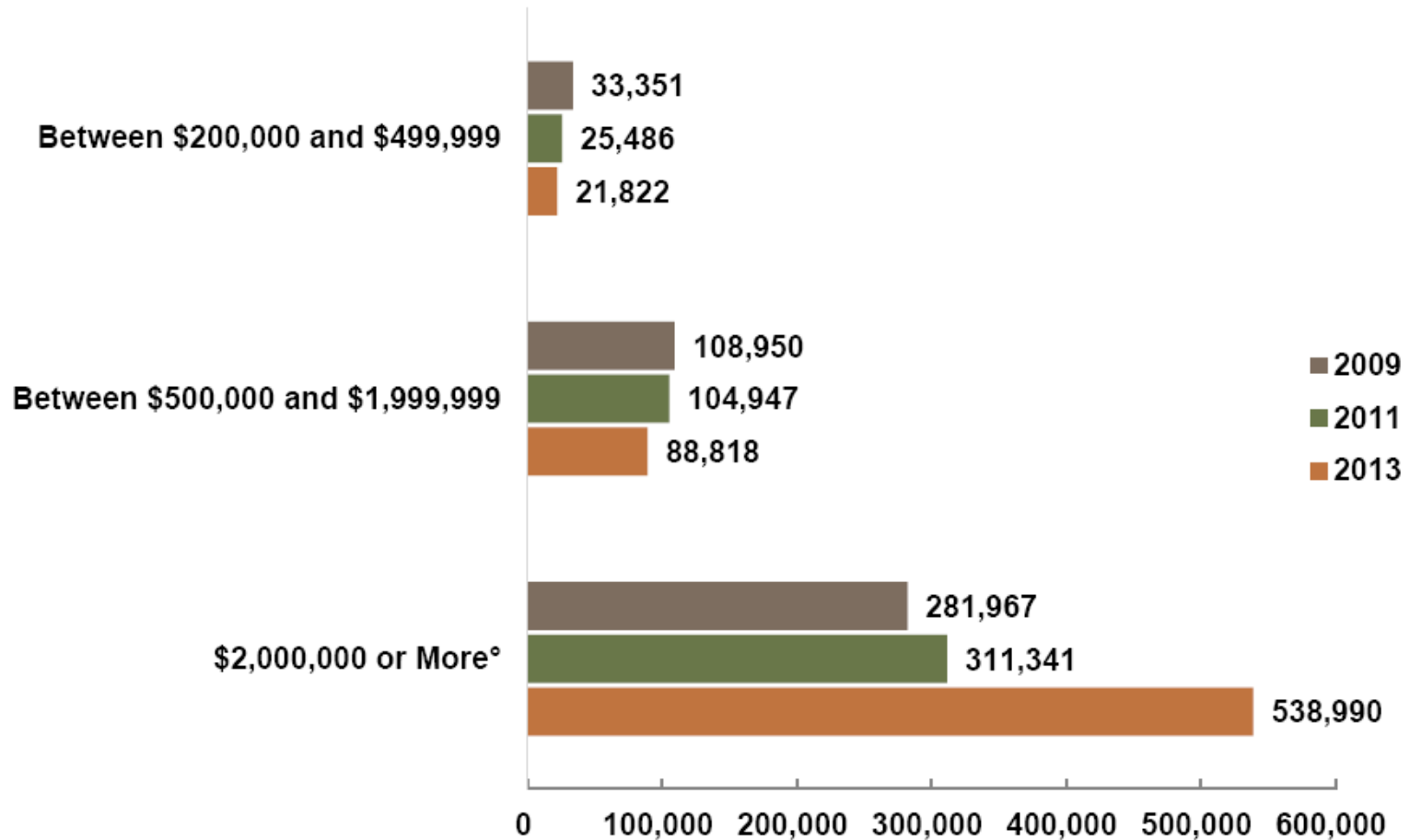
# OBJECTIVE LARGEST GIFT MADE

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



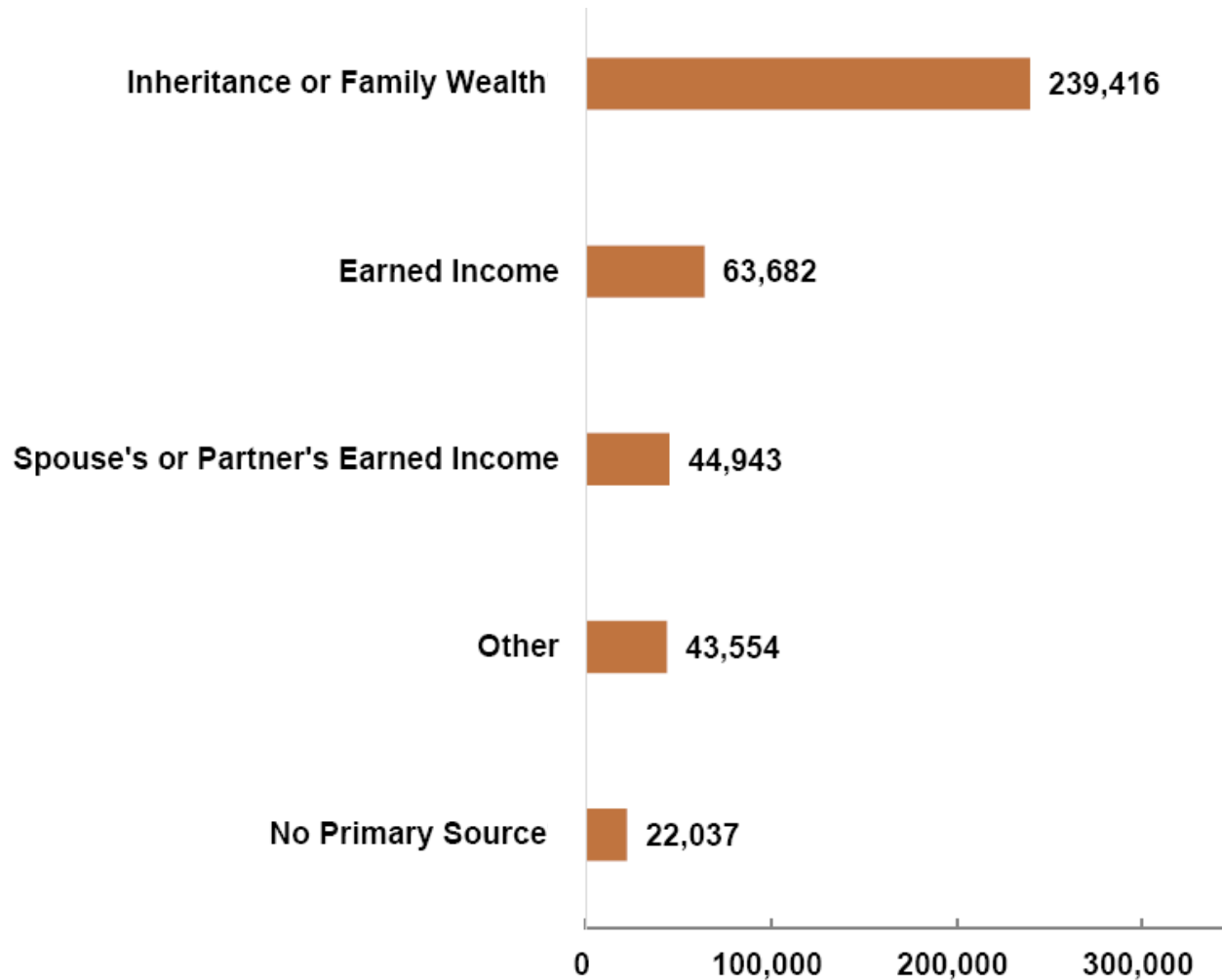
Source: 2014 US Trust Study of High Net Worth Philanthropy

# AVERAGE GIVING BY INCOME



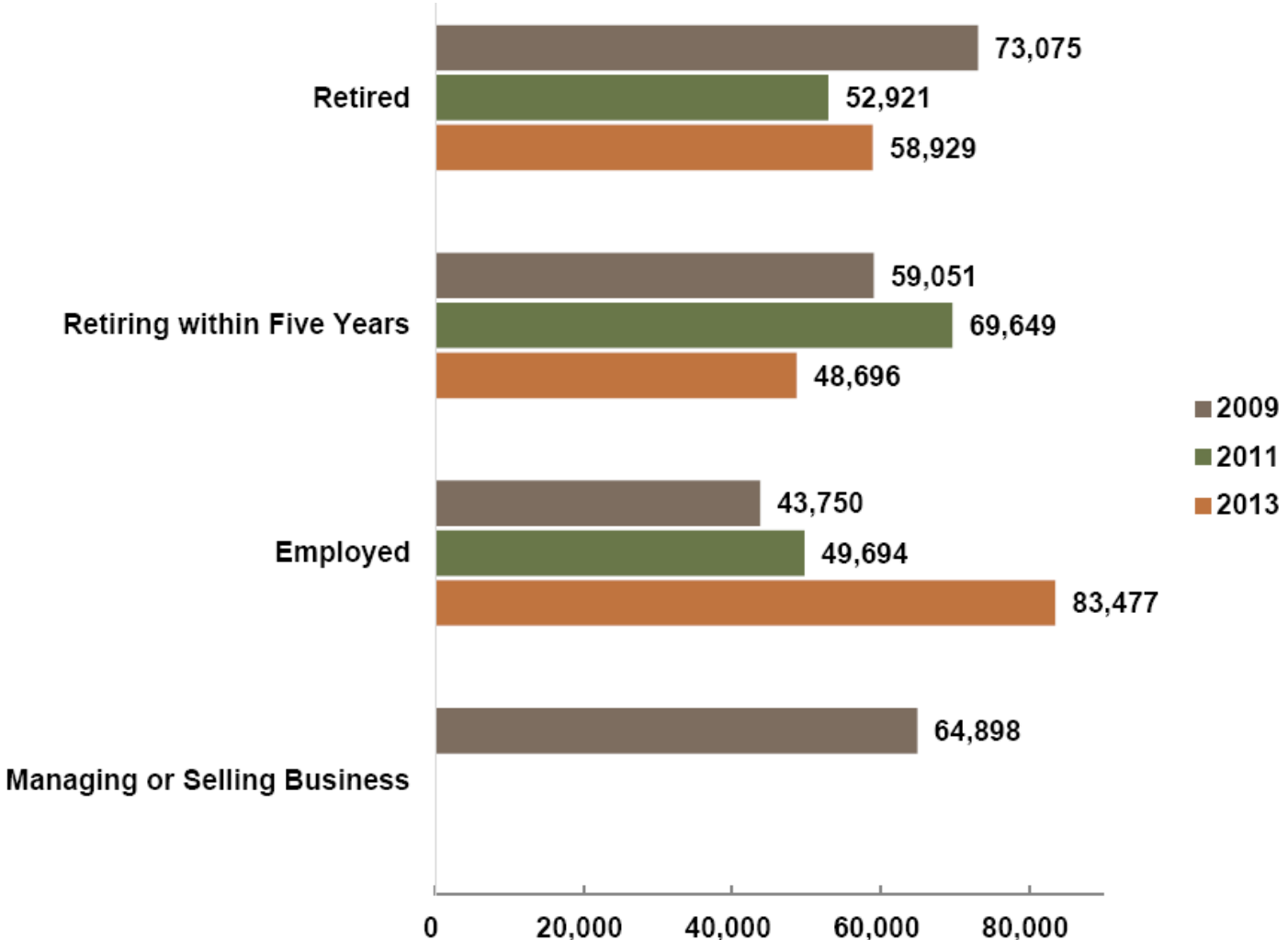
Source: 2014 US Trust Study of High Net Worth Philanthropy

# AVERAGE GIVING BY SOURCE OF WEALTH



Source: 2014 US Trust Study of High Net Worth Philanthropy

# AVERAGE GIVING BY EMPLOYMENT STATUS

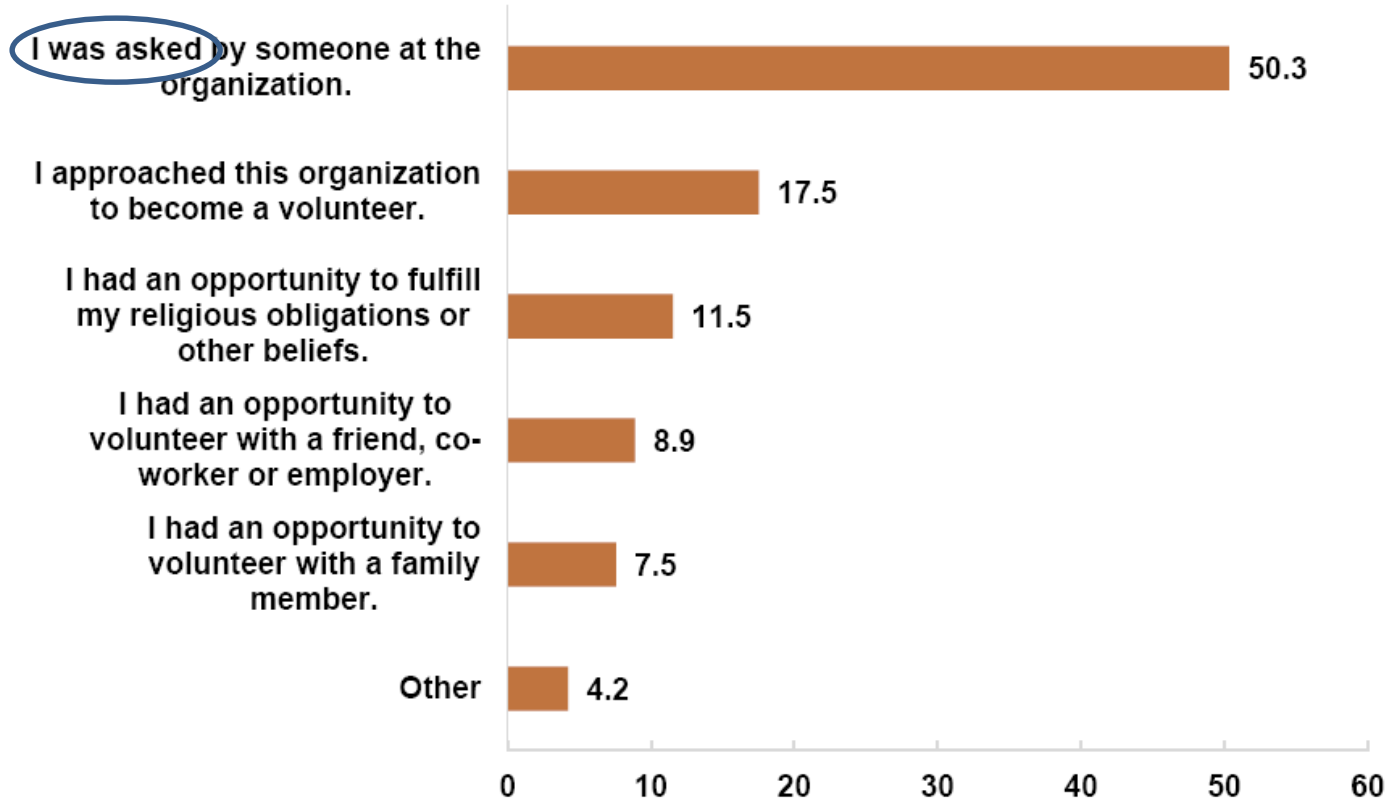


Source: 2014 US Trust Study of High Net Worth Philanthropy



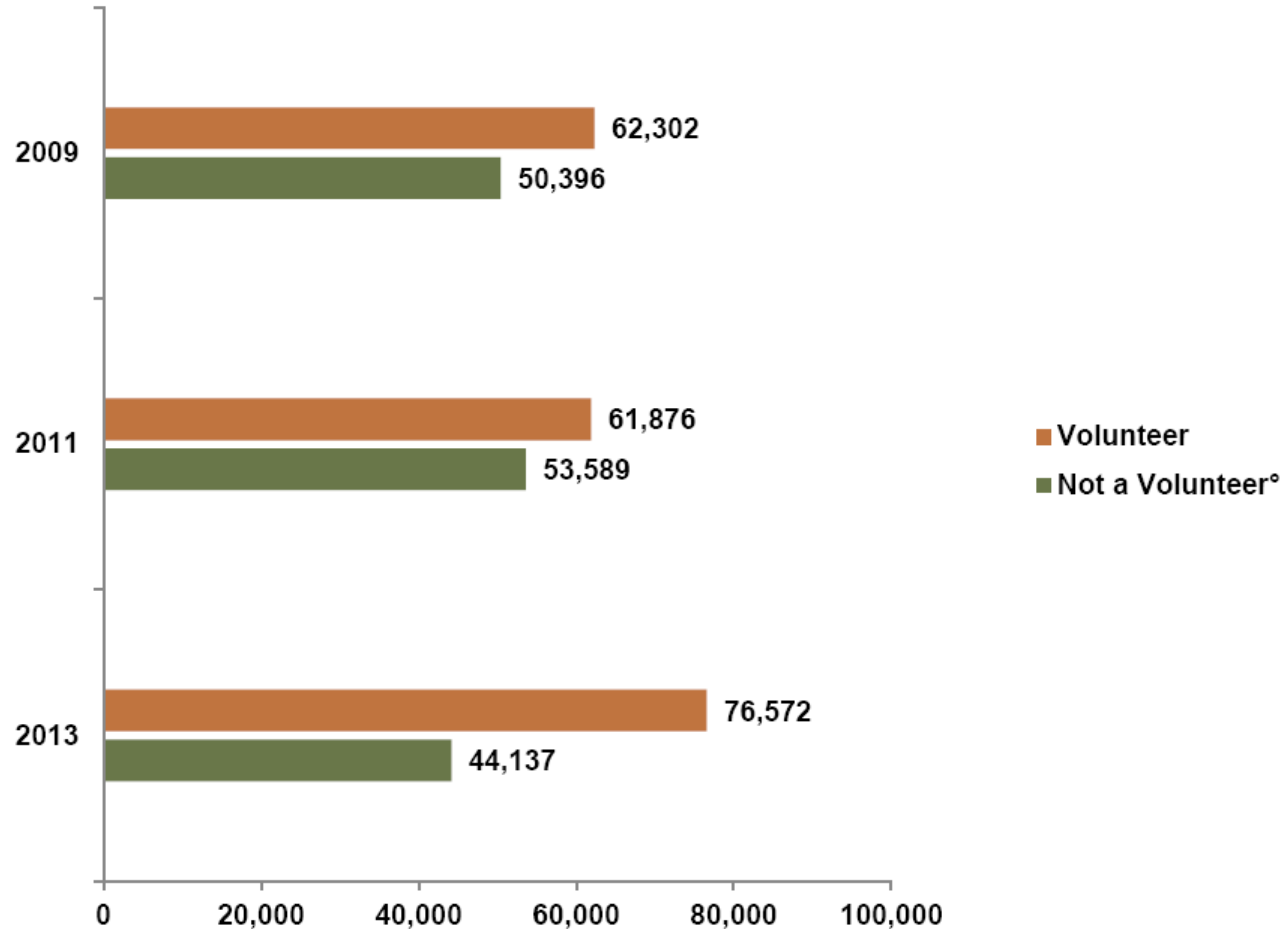
# WHY VOLUNTEER

*“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

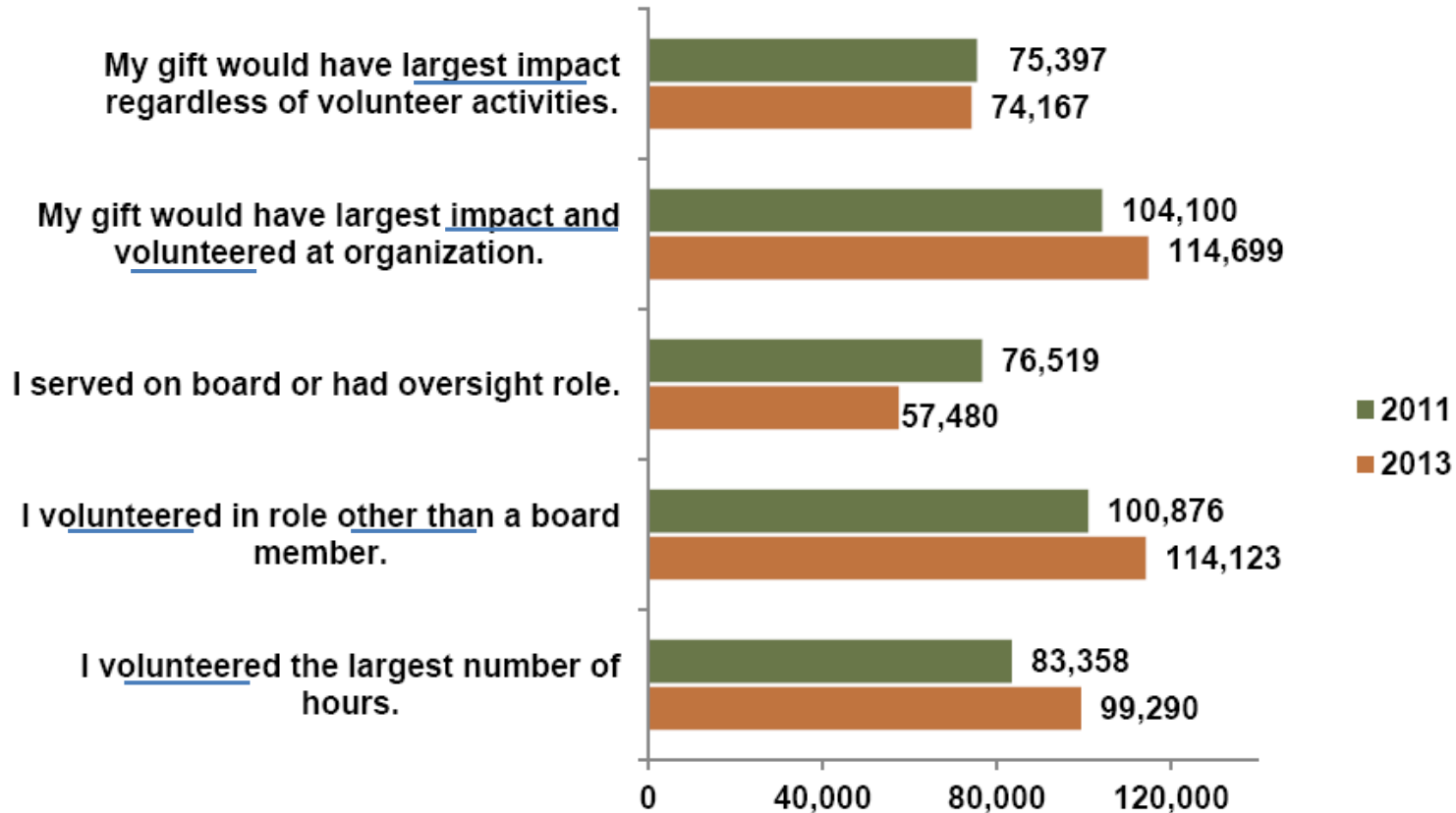
# AVERAGE GIVING BY VOLUNTEER STATUS



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 and descriptive language.
- Rapport techniques can be learned and applied intentionally to increase relationship success.



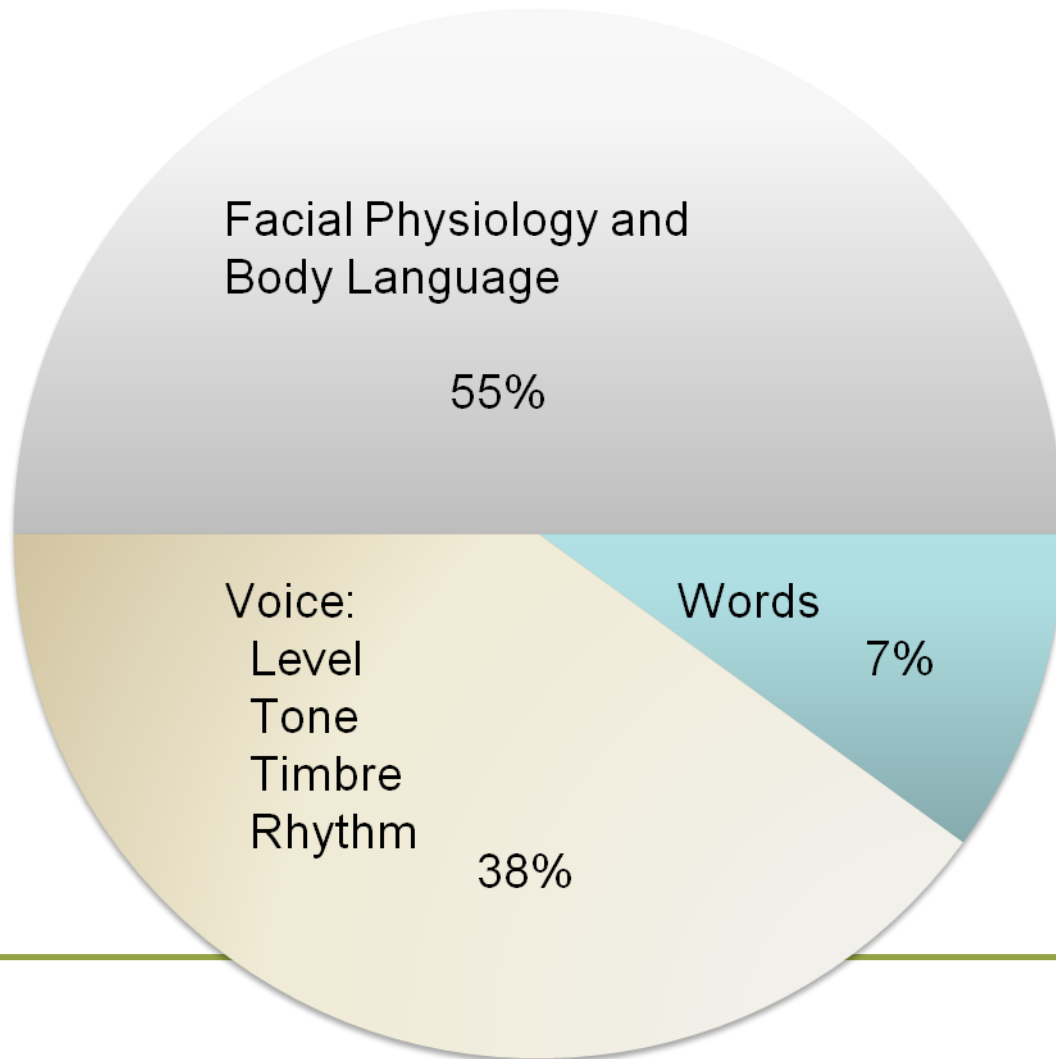
# Neuro-Linguistic Programming embraces three simple concepts.

## Neuro-Linguistic Programming

- We experience our reality through our neurological system. Everything we encounter is channeled and processed through our **five senses**.
- Our neural representations are coded, ordered, and given meaning through language and non-verbal communication.
- Each person expresses his or her **unique “program”** for communication that we can learn from to establish rapport, relationships, trust, and influence.



# Rapport Complexities



# Non-verbal Communication



- Great Major Gift officers can “read” people. Most do this unconsciously. They are “**Unconscious Competents**”
- We can all become “**Conscious Competents**” through basic education in Behavioral Type, Emotional Intelligence, and NLP.
- Whether you are already an “Unconscious Competent” or not, these tools will empower you to intentionally design your behavior and your communication for success with your donors.

## Read the donor



## Being in sync



- People feel listened to, understood and safe with people who are like themselves.
- Match the donor's volume, tone, and rate of speech to increase trust and to foster the donor's willingness to communicate.
- Mirror the donor's body language with subtlety to automatically increase rapport.
- Like partners in a dance, we unconsciously mirror each other's movements and postures.
- When you are in pace with your dancing partner, you will easily lead them to the next step.

# Rapport = Likeability

We say yes to someone we like.



# Anything is possible



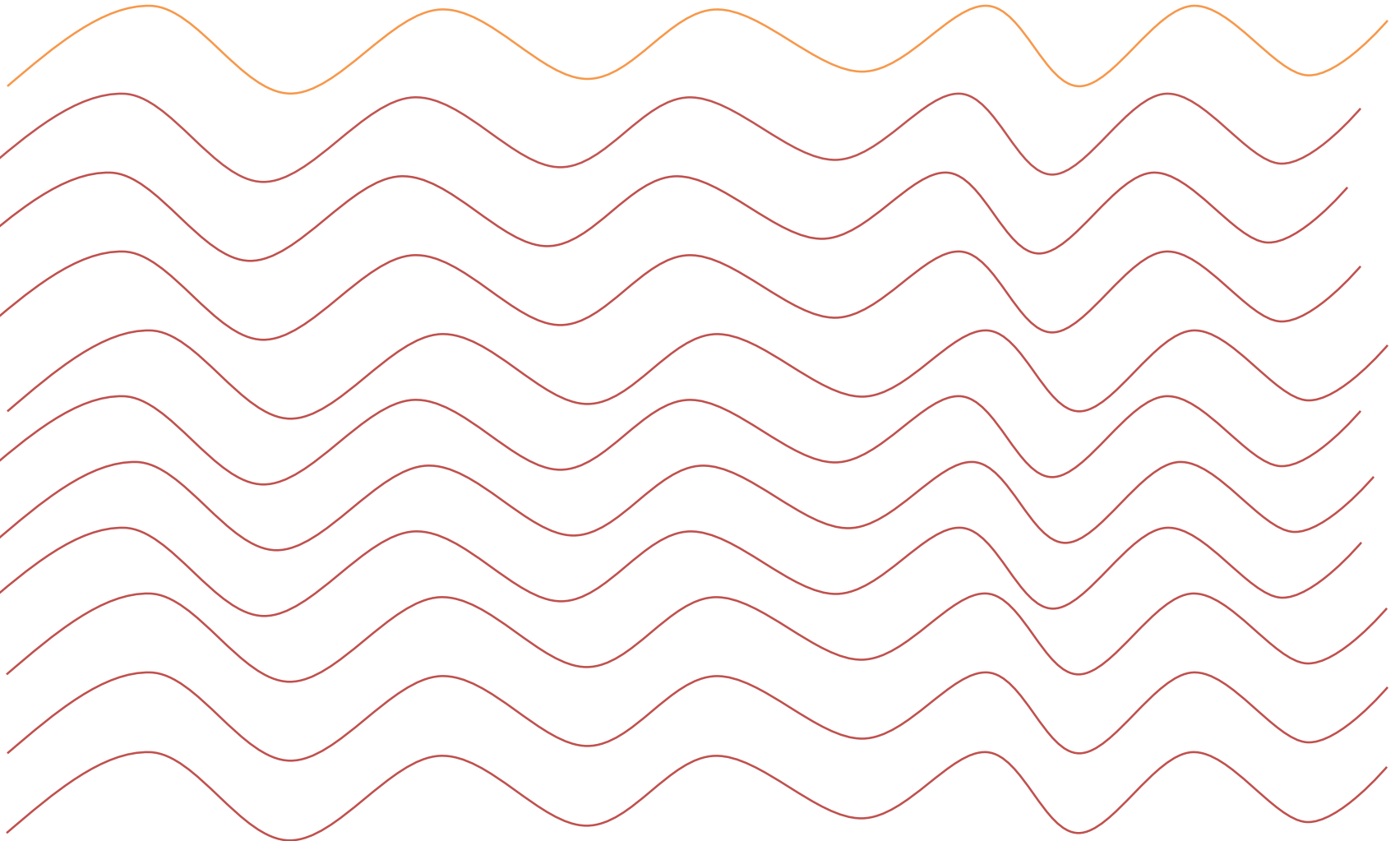
# From Rapport To Relationship

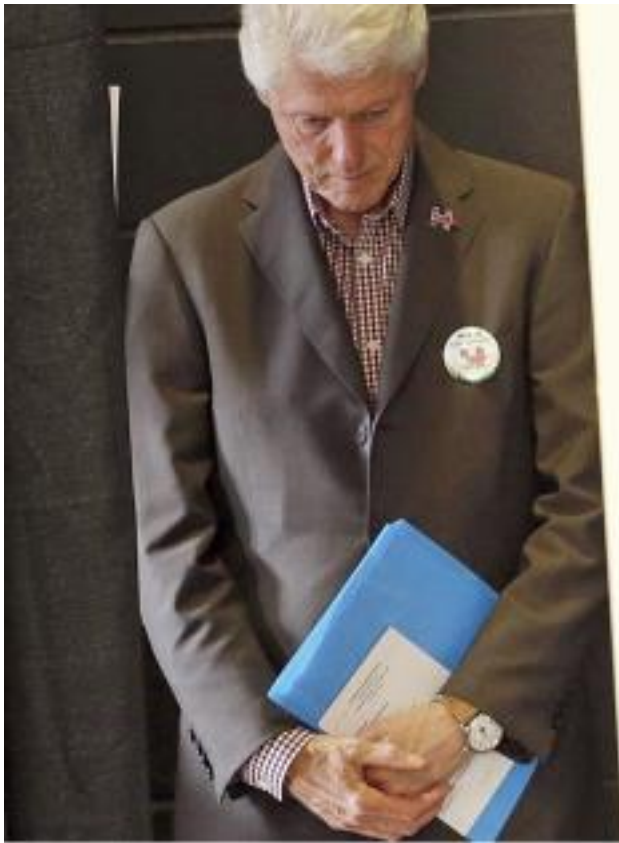
R I D E T H E W A V E

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“In our family when you were a child you could not tell a story until you proved you could listen to one,” Bill Clinton said. “And my aunt, my uncle, my grandparents, they would look at me and say, Bill, did you hear that? And I'd say, yes, I did. Did you understand it? I think so. What did you hear? And you would have to stand up and say what you heard. And I don't think so much of that happens anymore.”

***Of those listening skills, he said: "I think that's why I got elected president."***

## The power of a smile when you are all alone

### Smile

Magnetic Resonance Imagery confirms--

the brain structures that trigger smiling activate dopamine to produce more smiling, pleasure, and an increased feeling of well being.

**Dopamine deactivates negative emotions.**

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# Hallucinations

*Make your own*

*Worrying is the misuse of imagination*

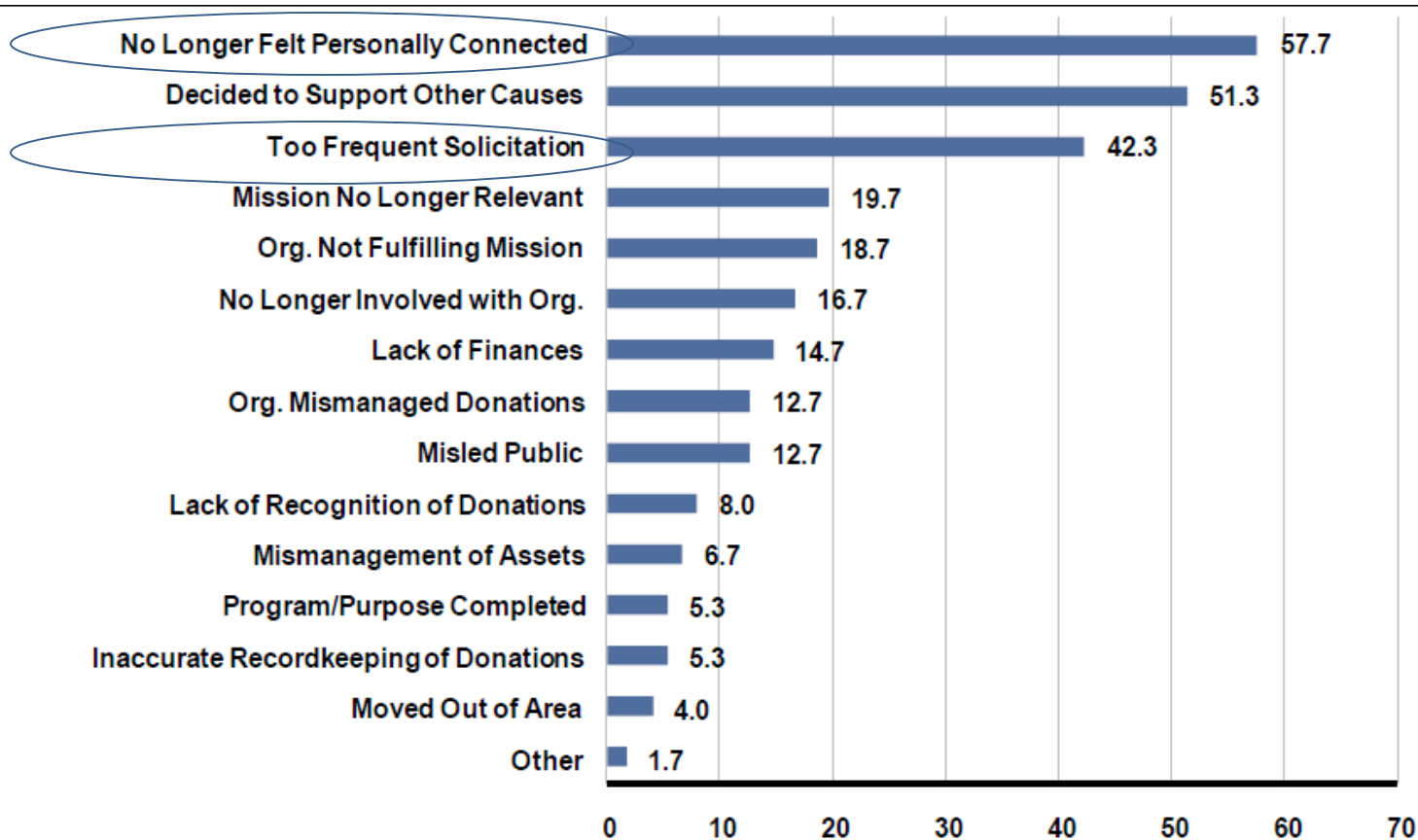




# WHY WE LOSE DONORS

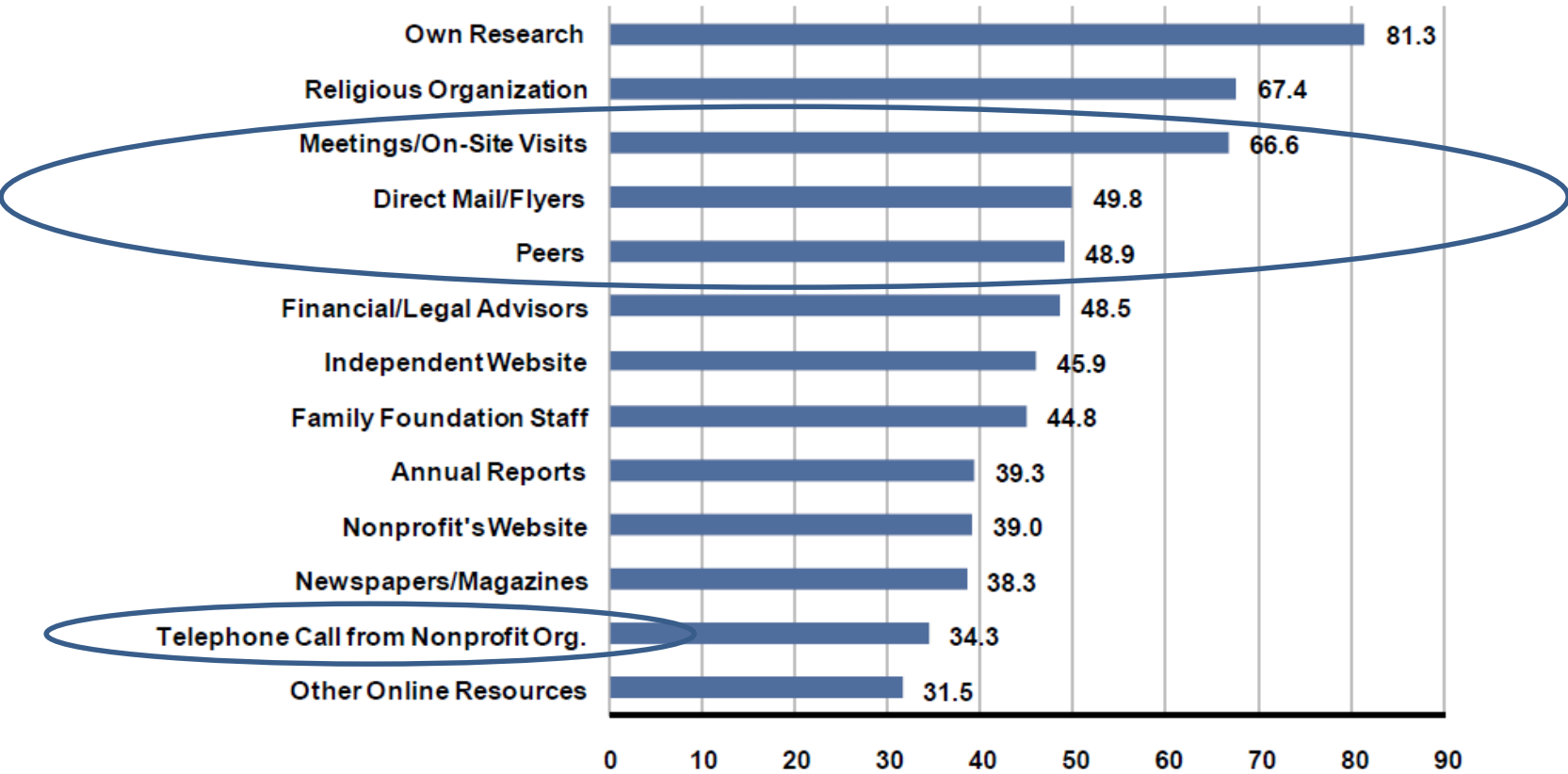
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## Reasons Why HNWHs Stopped Supporting the Organization(s) They Previously Supported (%)



Source: 2014 US Trust Study of High Net Worth Philanthropy

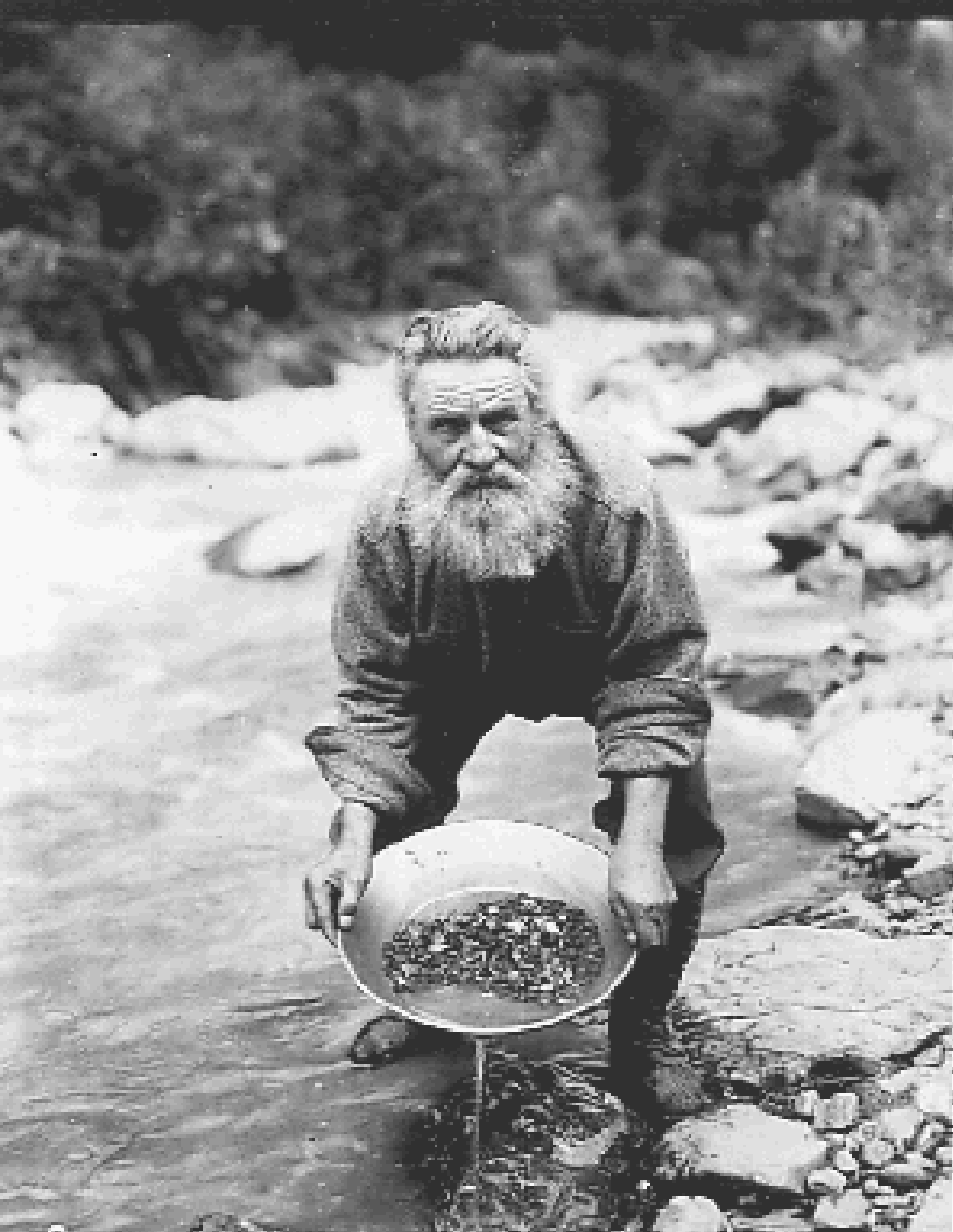
# Where HNWHs Get Their Information About Nonprofit Organizations by Primary Sources (%)



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

Source: Virginia Mason Foundation

# Advancement Program Basic Elements

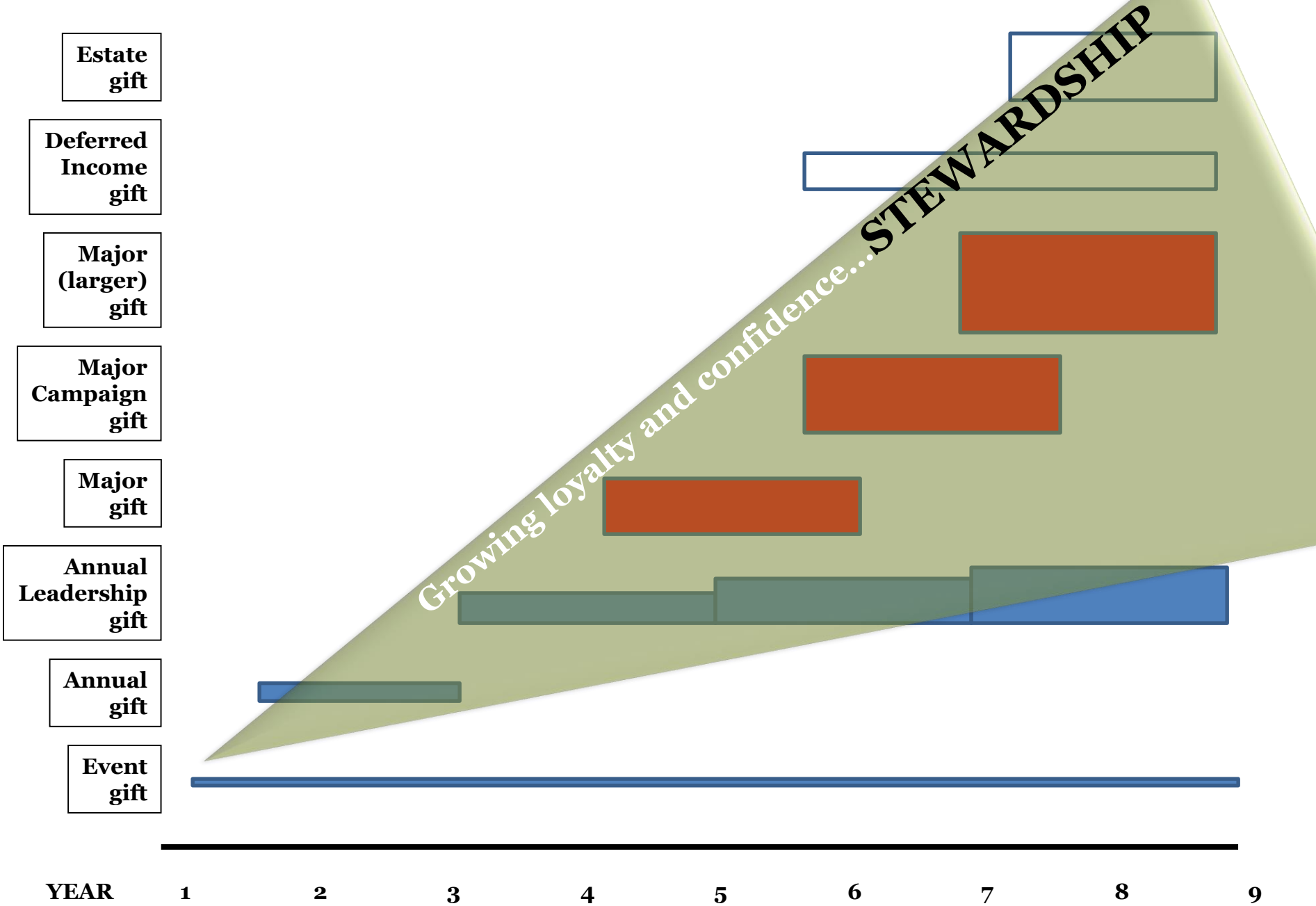


- **Annual Giving:** Recurring and growing support from a larger number of new and past donors every year, including alumni, grateful patients, subscribers, event attendees.
- **Direct Mail:** Reaching large numbers of active and new donors in a way that educates, and bonds donors—filling the “pipeline”
- **Grateful Patients:** Working with clinicians to refer patients who are grateful and have capacity
- **Thank-You Calling (bonding):** Can combine with Direct Mail for a more personal touch
- **Special Events:** Best way to get the community involved, heightens visibility, makes new friends, identifies prospective donors
- **Corporate Giving:** Motivated by business objectives and being a good neighbor, annual gifts, event sponsorships, special projects

# Advancement Program Basic Elements



- **Major Gifts:** From individuals, an ongoing focused effort of authentic relationship-building and individualized attention **that results in stretch commitments**
- **Foundation Support:** Grant writing, networking with private and family foundations, typically for project support
- **Campaign:** An intensive, time-limited effort to raise a large sum for an urgent need or group of needs. Typically involves multi-year pledges and gifts from donors ' asset base
- **Planned & Deferred Giving:** A type of major **giving that includes** bequests, trusts, annuities, insurance, retirement and other estate strategies, often from loyal donors, often involves outside advisors



# Donor Lifetime Value

# PEG Donor Profile

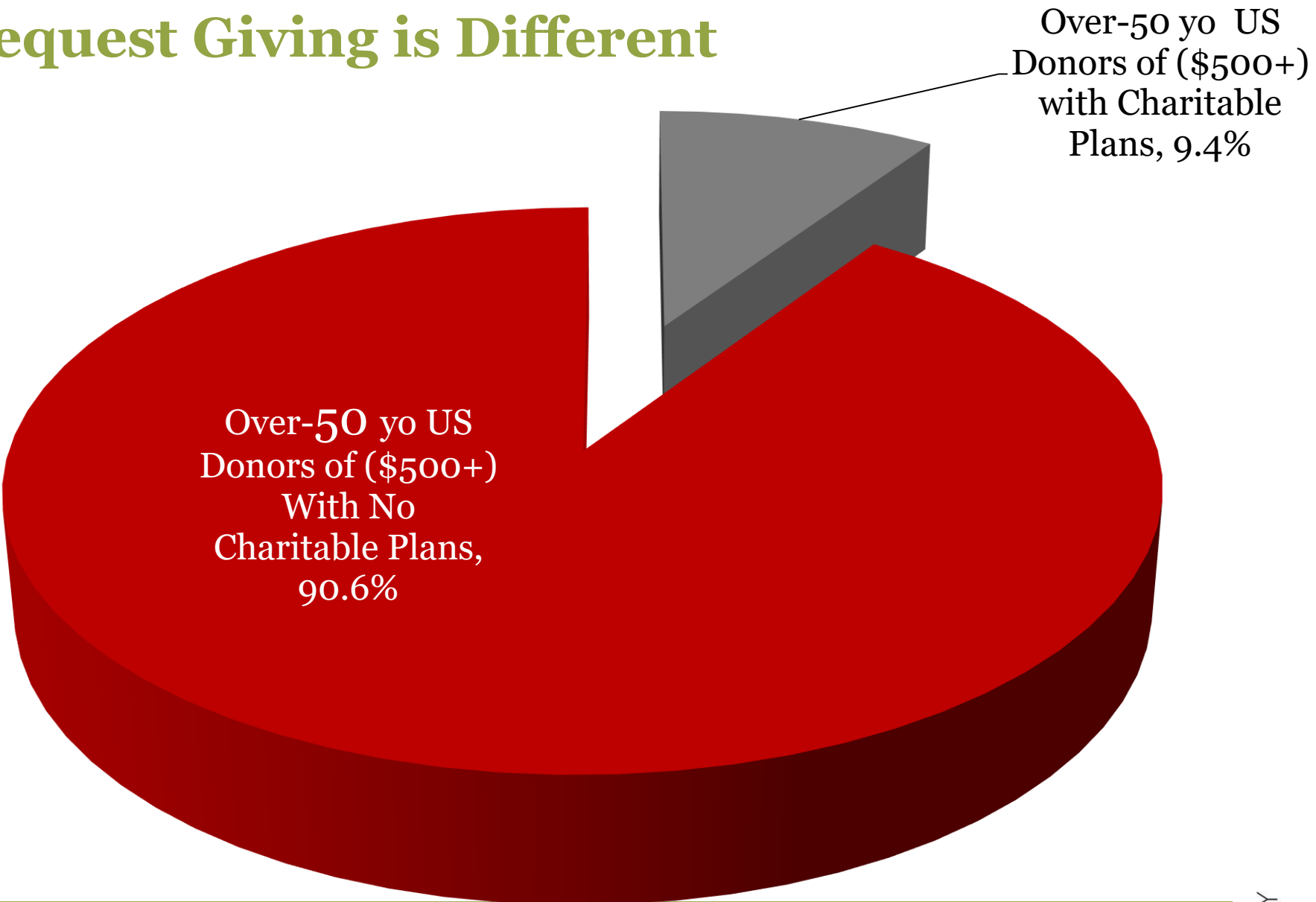
## PEG Donors are not necessarily wealthy:

- 69% of PEG donors give LESS than \$500 per year and are unrated prospects
- Wealth screening and demographic criteria are POOR predictors of propensity to make a planned gift
- The ONLY predictor that has high predictive value is LOYALTY
- 40% of planned giving donors give 10+ consecutive years
- Most of the other 60% give loyally, but not consecutively



SOURCE: The Planned Giving Company national client database of more than 10,000 PEG donors.

# Bequest Giving is Different



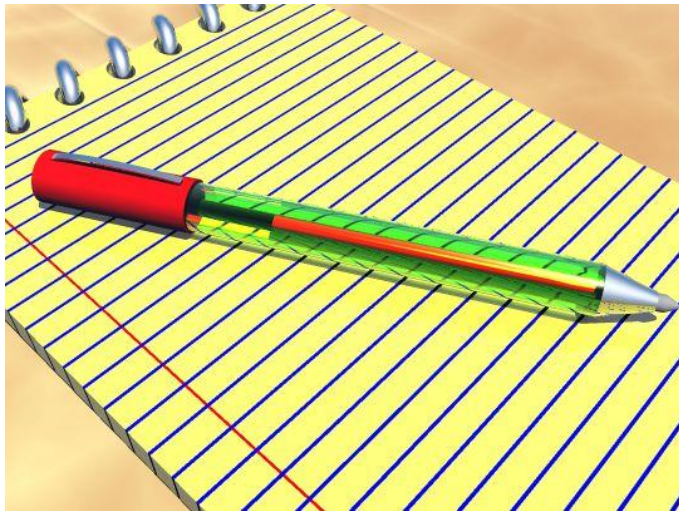
SOURCE: nationally representative 2006 sample from Health and Retirement Study



Story  
Time



# Build prospect screening lists



Key metrics/characteristics include:

- Loyal donors / many gifts
- 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 Nickason	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

<p><b>TYLER FLORENCE</b></p> <hr/> <p><b>Prospect for:</b> Relationship manager: <b>Jack</b></p>		<p>ANNIE 1</p>	<p>LOURDES JC 3 JUSTO FANJUL 3 LIANA DE MENA 3</p>	
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<p><b>VIOLA DAVIS</b></p> <hr/> <p><b>Prospect for:</b> Relationship manager: <b>Jack</b></p>		<p>JAMIE 3 SEAN 2 CHRISTOPHER 4</p>	<p>JUSTO FANJUL 1 JAMIE 3</p>	
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<p><b>KEVIN GARNETT</b></p> <hr/> <p><b>Prospect for:</b> Relationship manager: <b>Tom</b></p>		<p>BILL 1</p>	<p>LIANA DE MENA 3 BILLY BALDWIN 2 KRISTINE WENZEL 1</p>	
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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

# Case for Investment

- Value proposition
- Urgent
- Compelling argument
- Who benefits
- Cause and Effect
- Why your organization
- Customize for each constituency



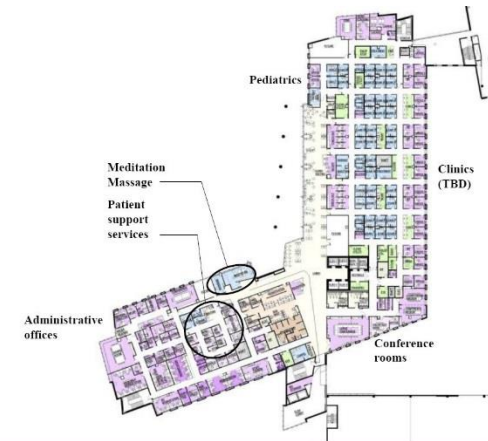


# Legacy Recognition Opportunities

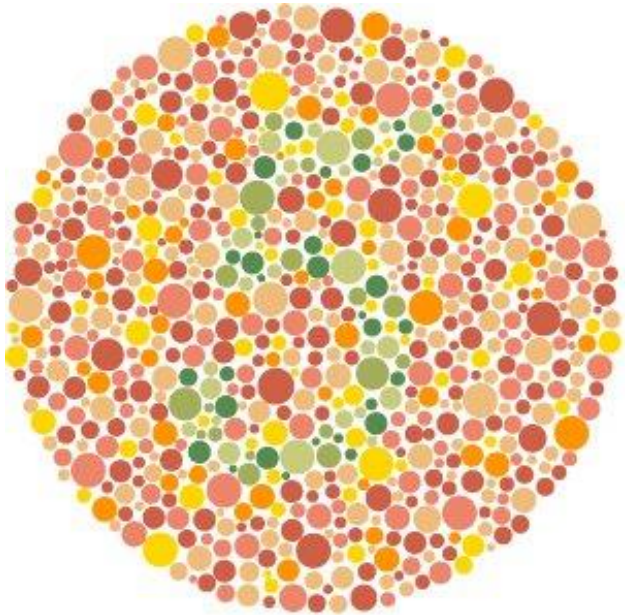
## THE MIAMI CANCER INSTITUTE



MCI Campus and Cancer Institute Pavilion	\$150,000,000
Miami Cancer Institute Pavilion	\$50,000,000
Research Building and Programs	\$30,000,000
Proton Therapy Building and Program	\$25,000,000
Breast Cancer Program	\$15,000,000
Clinical Research Program	\$15,000,000
Patient Parking Structure	\$15,000,000
Pediatric Cancer Program	\$15,000,000
Bridge to Baptist Hospital	\$10,000,000



# Easy engagement strategy: *test your case*



- Do your own feasibility study
- Visit with friends, associates, other directors
- Ask them to help you and react to the case statement to help you launch this annual or campaign fundraising effort
- Tell them you will not be asking for a gift ... yet
- Report back to your development committee with your feedback

## 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
<b>RELATIONSHIP / MOVES MANAGER #1</b>											
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	\$1000+	\$5000+	APRIL 2016	MAY	JUNE	JULY	AUGUST	SEPTEMBER
<b>ON DECK</b>										
Prospect #1		High Touch Mail	1		Mail		Newsletter			Mail
Prospect #2		High Touch Mail	1		Mail		Newsletter			Mail
Prospect #3		High Touch Mail		1	Mail		Newsletter			Mail
Prospect #4		High Touch Mail		1	Mail		Newsletter			Mail
Prospect #5		High Touch Mail		1	Mail		Newsletter			Mail
Prospect #6		High Touch Mail	1		Mail		Newsletter			Mail
Prospect #7		High Touch Mail	1		Mail		Newsletter			Mail

Stratagy was on the whole successful	Stratagy was not successful but progress was made on overall stratagy	Strategy was not successful or delayed; future strategies may need adjustment
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# Gift officer status meetings

- Weekly “huddles” held first thing Monday mornings.
- Each gift officer presents his/her 5 top activities for the upcoming week.
- Each gift officer reports on the results of last week’s top 5 activities.
- Consider course changes as indicated.



# 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 iterest 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 iterest 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 iterest 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 iterest 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					

Stratategy was on the whole successful

Stratategy was not successful but progress was made on overall stratategy

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

# 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
<b>MAIL</b>						
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

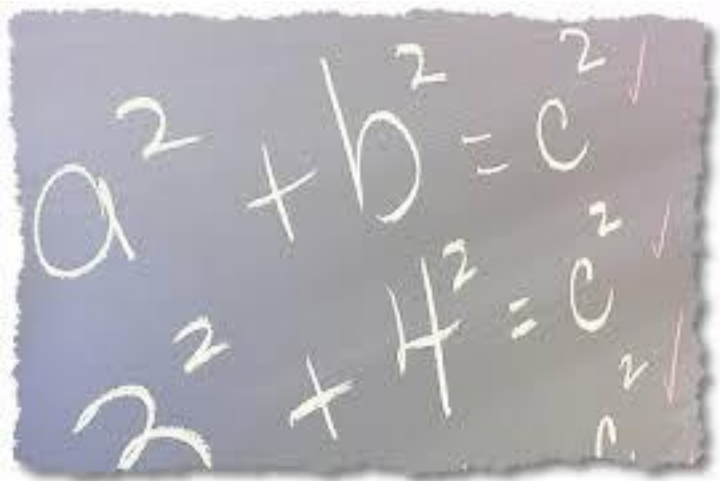
AVERAGE ASK	\$ 68,226
MEDIAN ASK	\$ 70,000
HIGH	\$ 180,000
LOW	\$ 25,000
RANGE	\$ 155,000

**More  
information?**



# 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

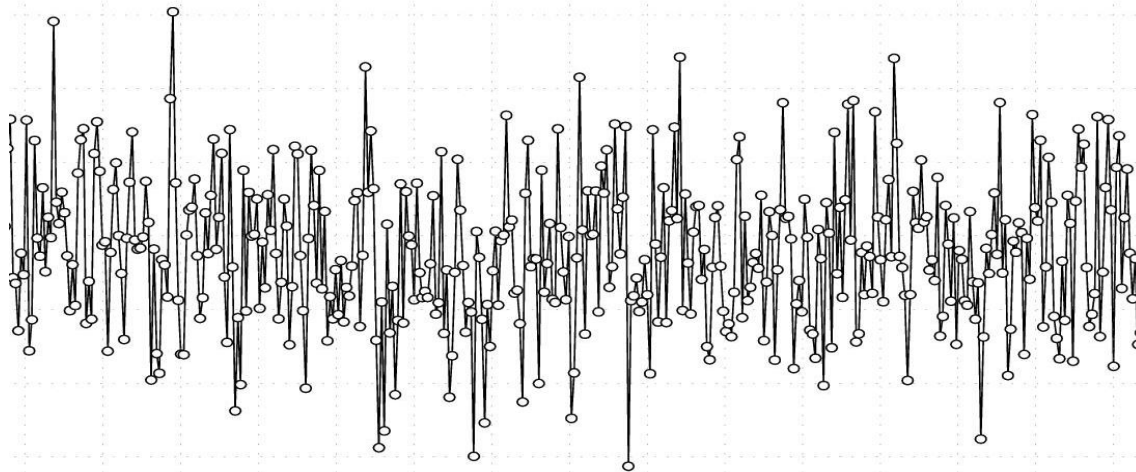
AVERAGE GOAL	\$ 308,036
MEDIAN GOAL	\$ 150,000
HIGH	\$ 2,000,000
LOW	\$ 50,000
RANGE	<b>\$ 1,950,000</b>

### ASK

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

## 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