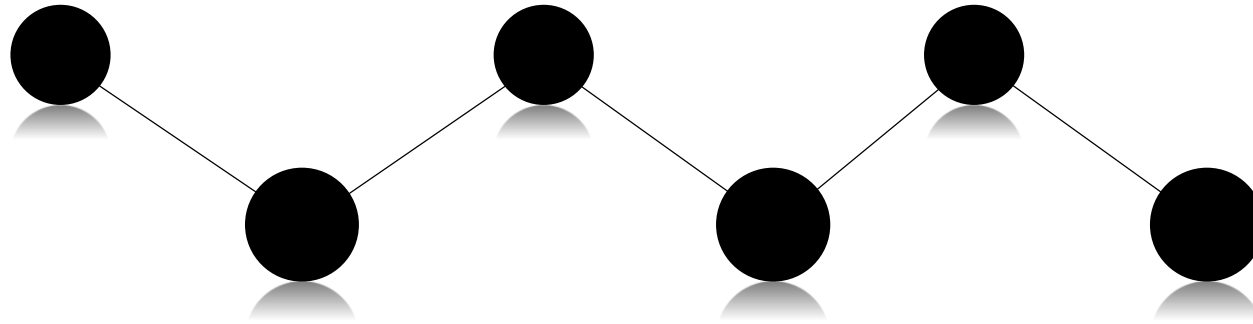


Maximizing Major Donor Pipeline



Larry G. Raff MPH
Copley Raff Inc.
2019



Terrified

1



Apprehensive

2



Suspicious

3



Ambivalent

4



Sassy

5



Game

6

How are you feeling today?

What to expect

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



Key principles

1. 85% of success in fund raising is based on extraordinary relationship and rapport skills. *These are teachable.*
2. Research pays off.
3. The most important major gift marketing strategy is building relationship networks.
4. Getting to yes may be a bumpy ride, so hang on.
5. Cultivating people, not entities-- yields bigger results.



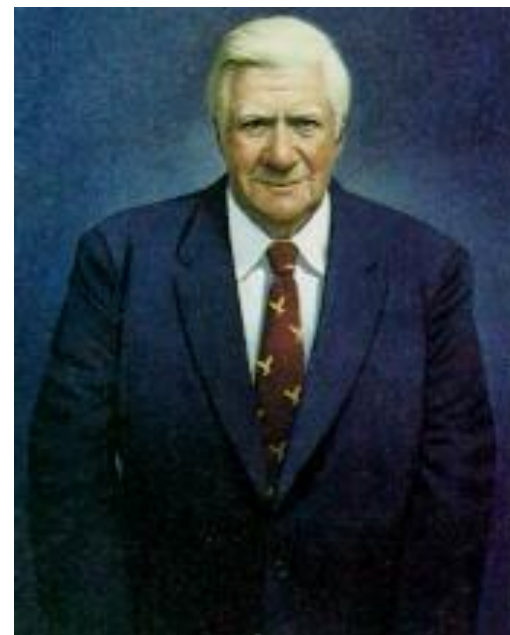
Key strategies

1. Speaking to all styles: emotions and metrics make a compelling combination.
2. Creativity with gift strategies and structuring.
3. Empowering the donor to create life meaning through giving.
4. 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



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



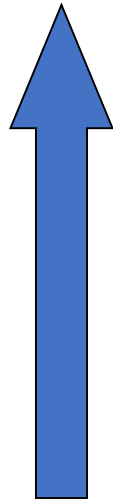
Disconnect your biases

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



Get personal

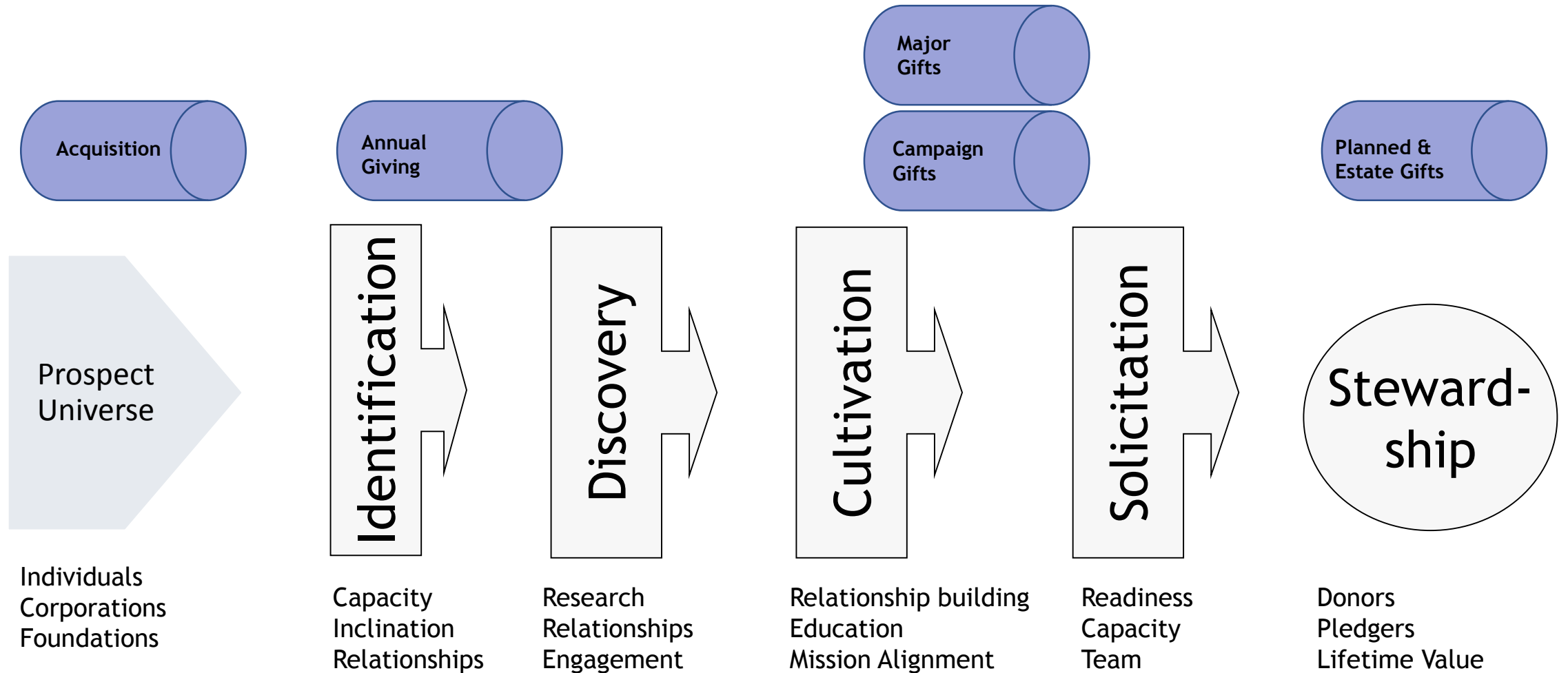
High results



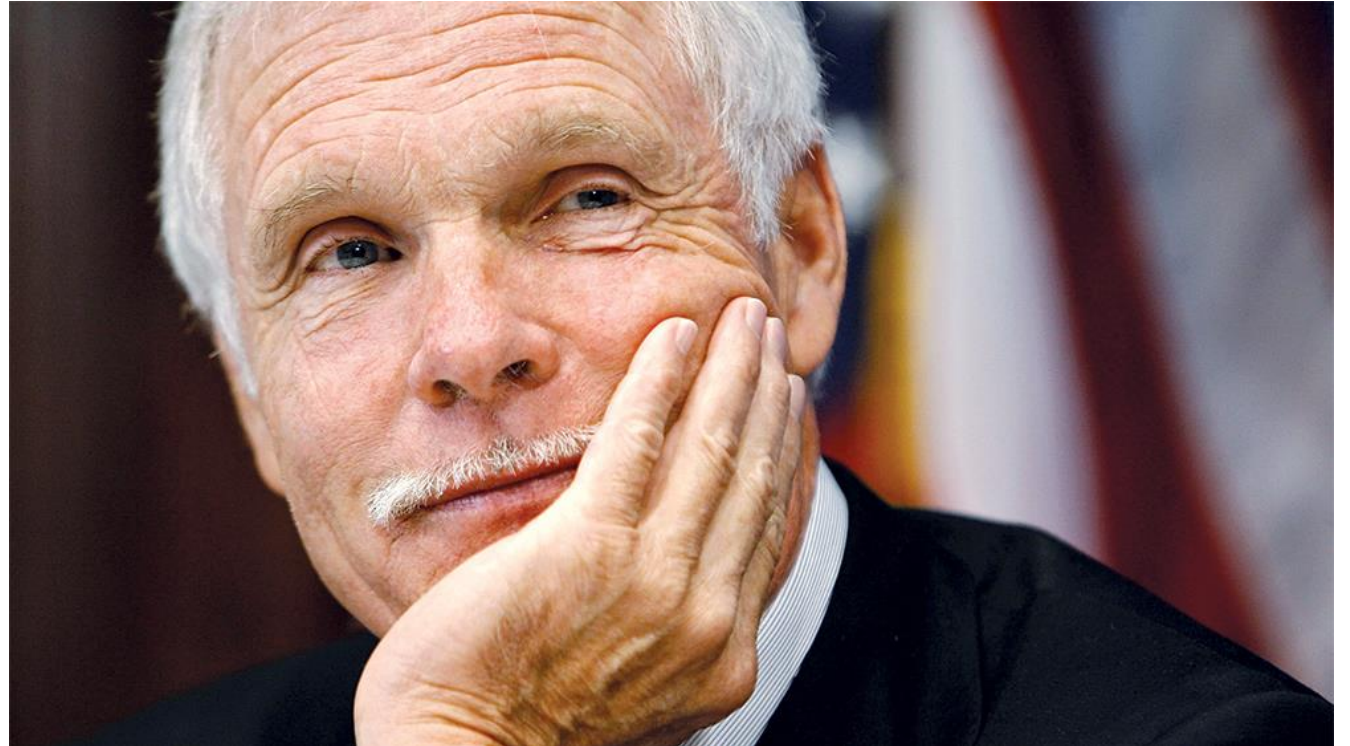
High “touch”

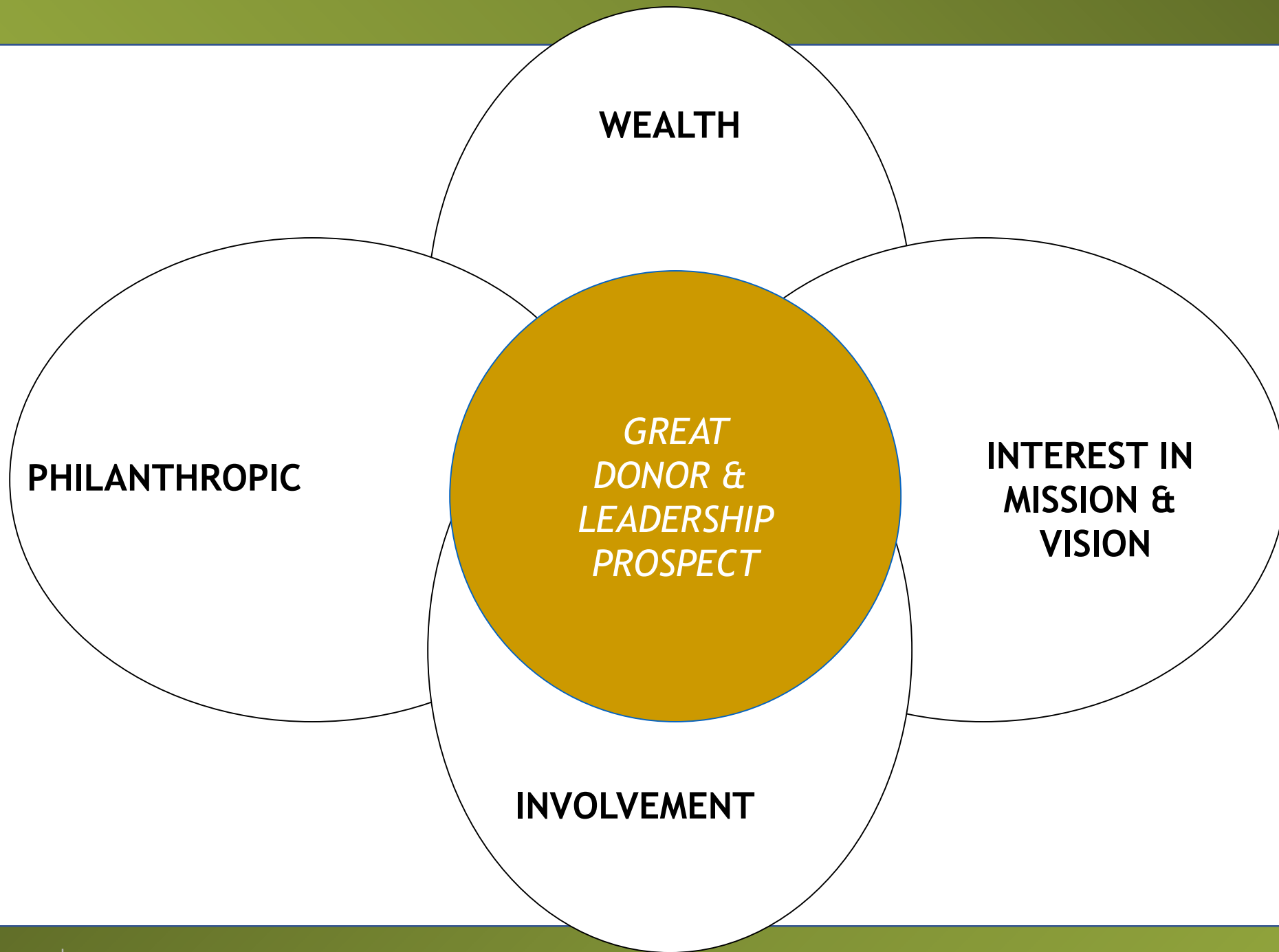


Major Donor Pipeline



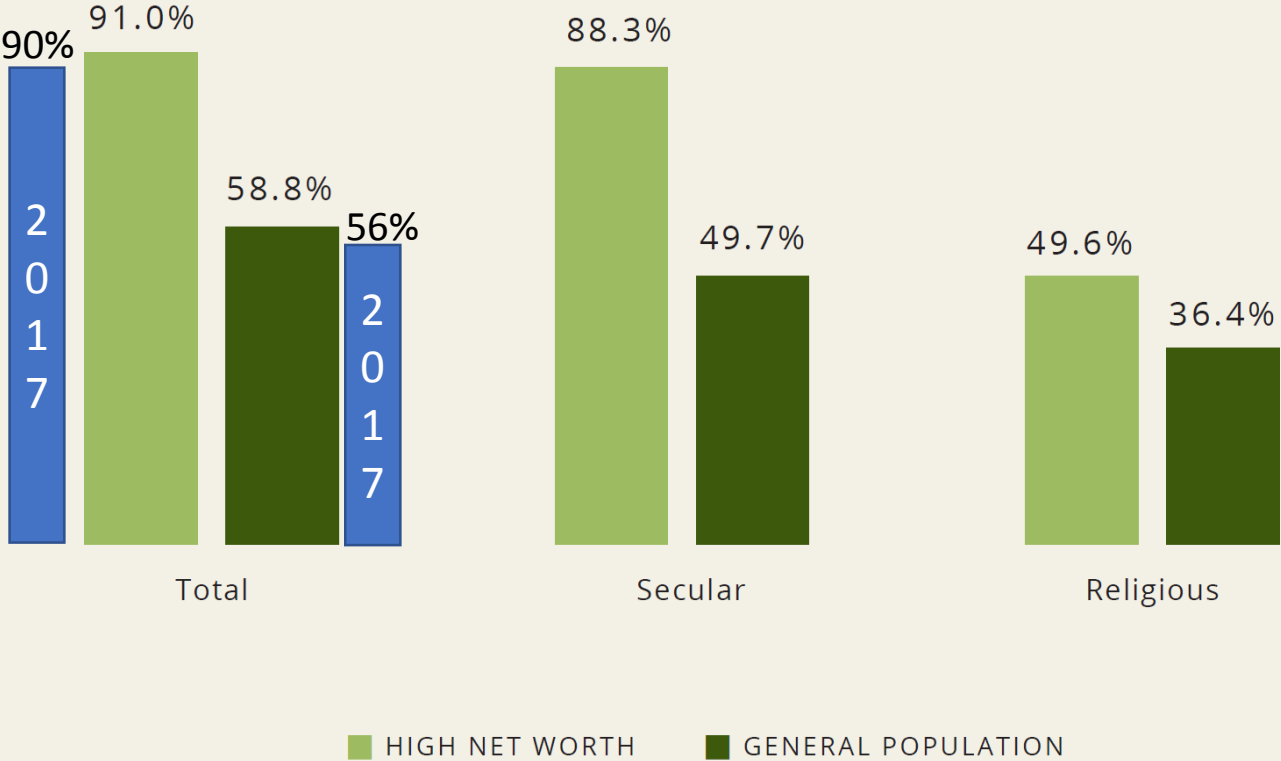
The philanthropic
behavior of high net
worth households.





High Net Worth Household Giving

HIGH NET WORTH HOUSEHOLDS REPORTING GIVING TO CHARITY IN 2015, COMPARED WITH THE PERCENTAGE OF THE U.S. GENERAL POPULATION REPORTING GIVING IN 2012*

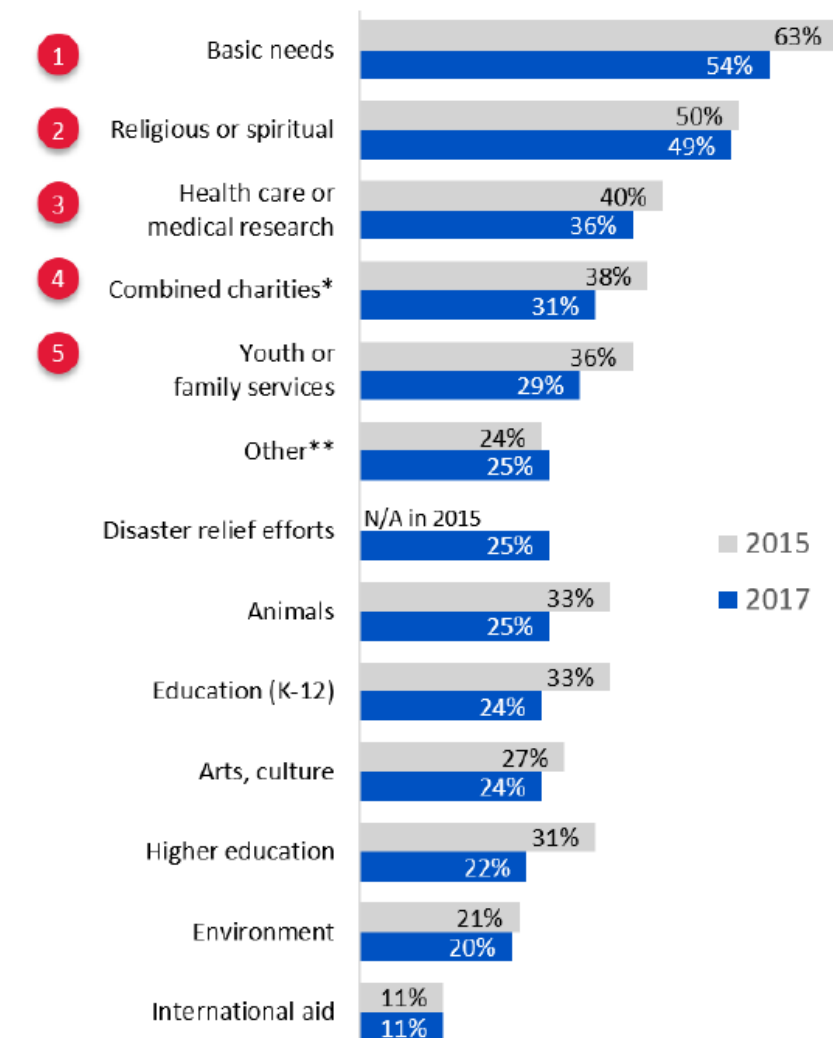


Source: 2016-18 US Trust Study of High Net Worth Philanthropy

Giving by Sectors

PERCENT OF HIGH NET WORTH HOUSEHOLDS GIVING BY CHARITABLE CATEGORY – 2017 VS. 2015

2015-2017

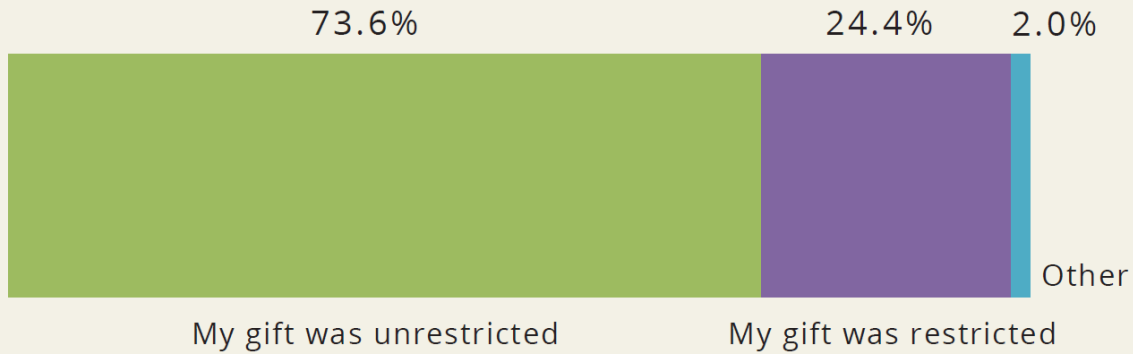


* Combined charities organizations include United Way, United Jewish Appeal, Catholic Charities, and community foundations, among others

** Other organizations include LGBTQ, veterans affairs, among others

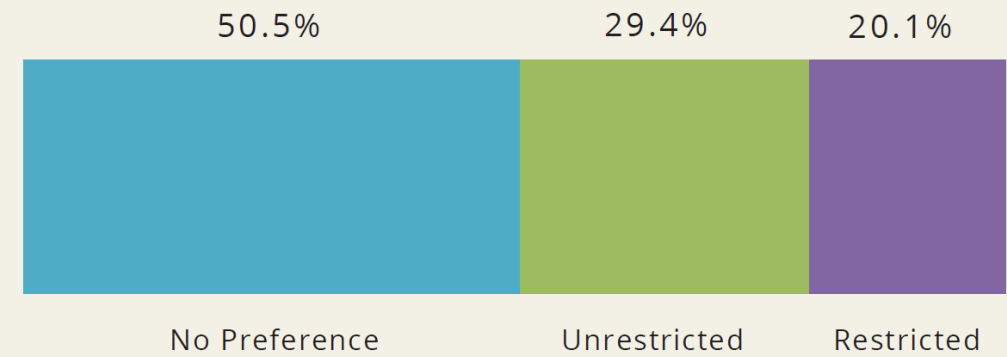
Source: 2018 US Trust Study of High Net Worth Philanthropy

OBJECTIVES OF LARGEST GIFTS MADE IN 2015



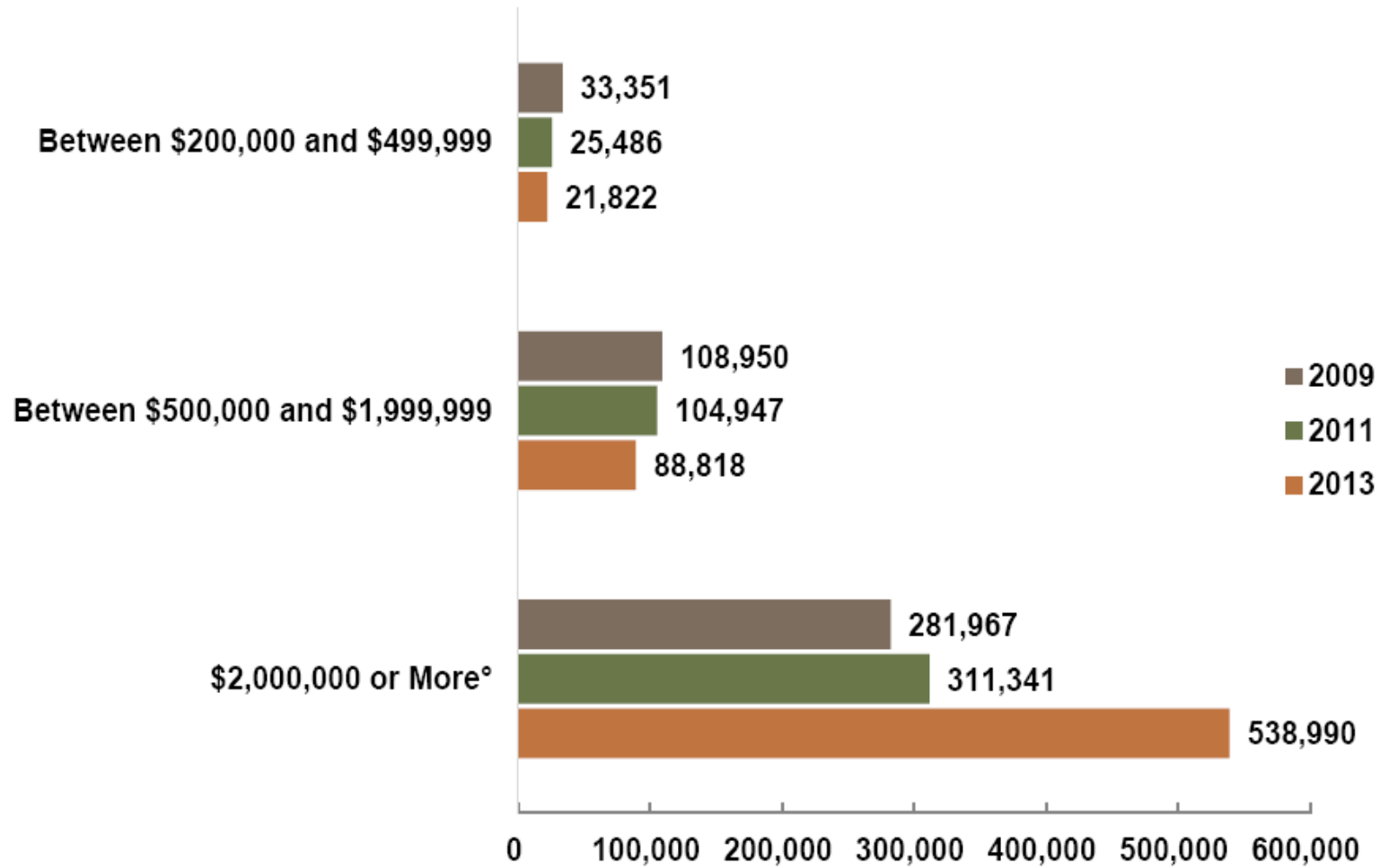
Largest gift restrictions

HIGH NET WORTH DONORS' PREFERENCES FOR RESTRICTED OR UNRESTRICTED GIVING



Source: 2016 US Trust Study of High Net Worth Philanthropy

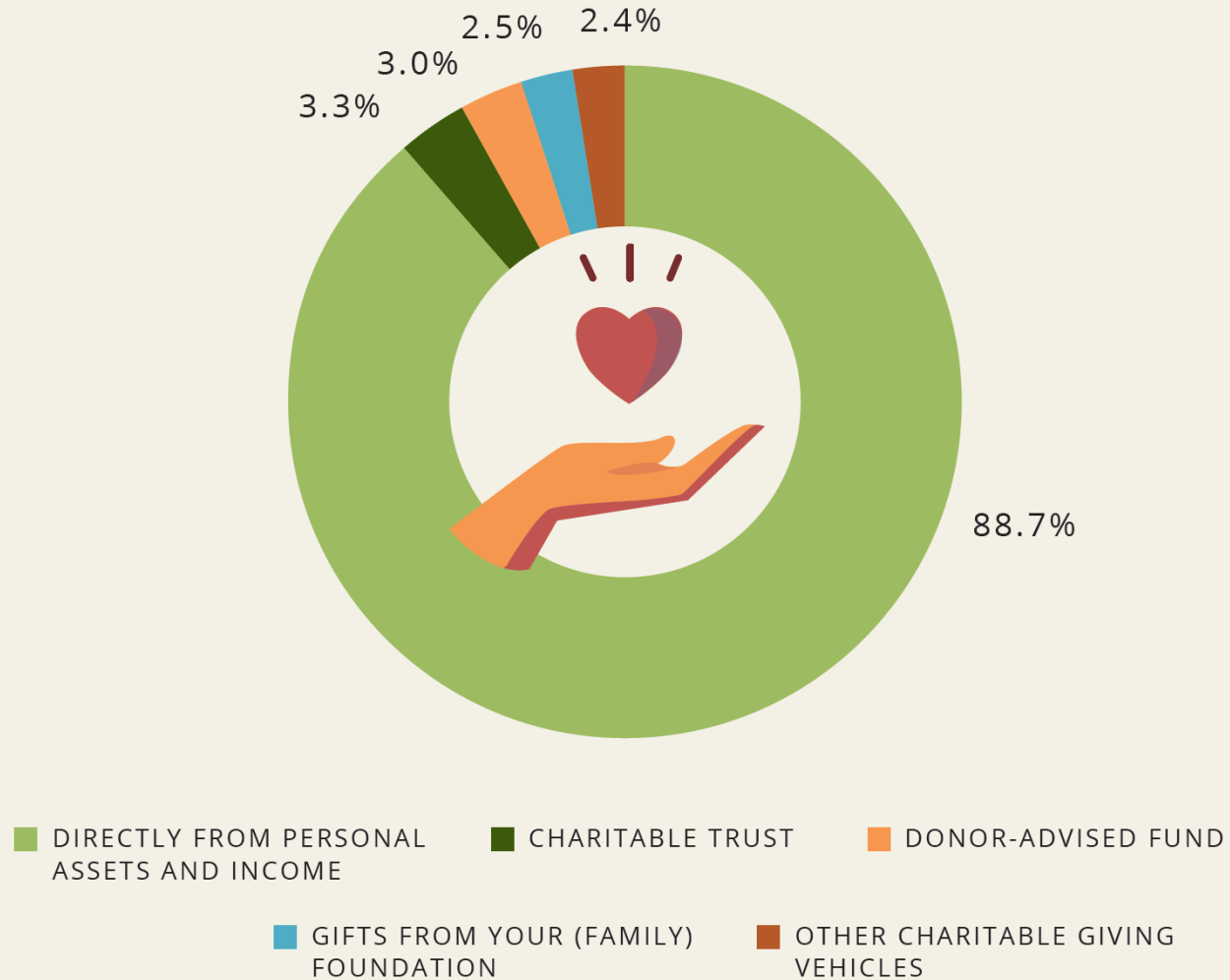
Average giving by income



Source: 2014 US Trust Study of High Net Worth Philanthropy

Gift sources

HIGH NET WORTH HOUSEHOLDS' PRIMARY SOURCE OF DONATIONS TO CHARITABLE CAUSES

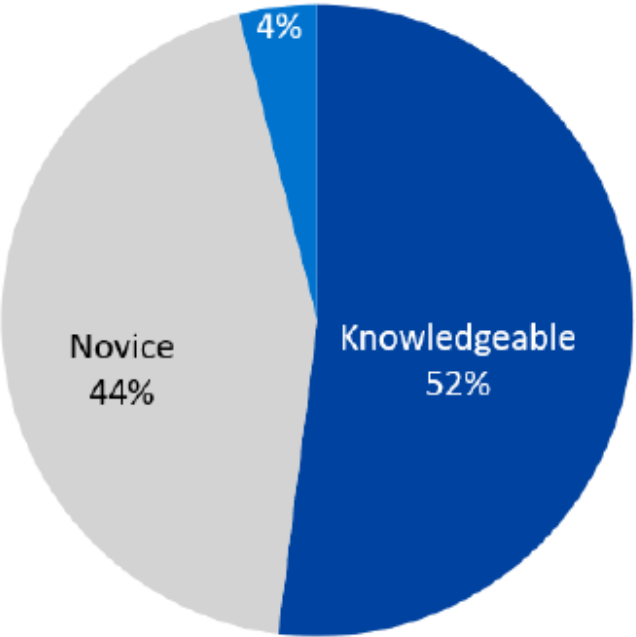


Source: 2016 US Trust Study of High Net Worth Philanthropy

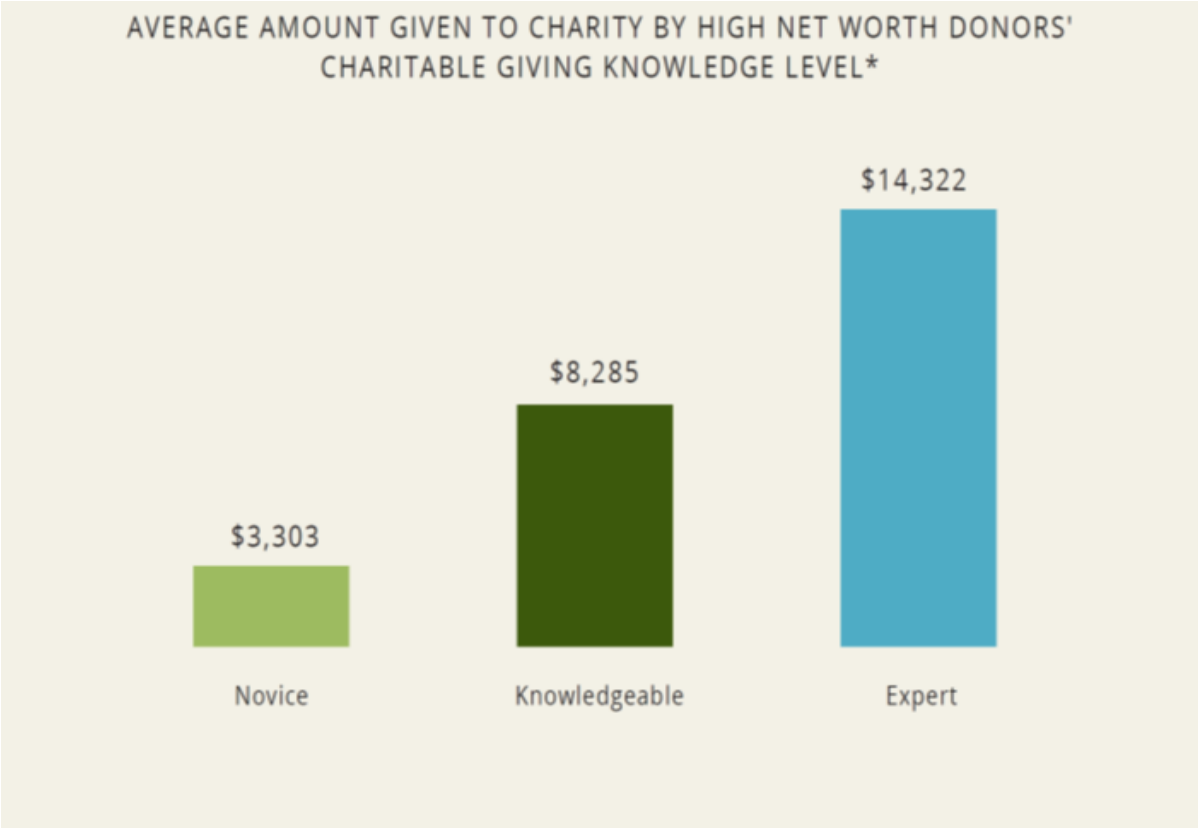
Informed Donors

PERCENT WHO DESCRIBE THEIR GIVING KNOWLEDGE

AVERAGE AMONG ALL RESPONDENTS



AVERAGE AMOUNT GIVEN TO CHARITY BY HIGH NET WORTH DONORS' CHARITABLE GIVING KNOWLEDGE LEVEL*



Source: 2016 & 2018 US Trust Study of High Net Worth Philanthropy

Volunteering

48%

of the high net worth
volunteered time
to a charitable cause
or organization in 2017



142

volunteer
HOURS
ON AVG

3

Avg. number
of charitable
organizations
engaged with

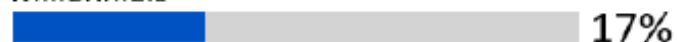
24%

High net worth
individuals who
serve on a
nonprofit board

**PERCENT OF HIGH NET WORTH
INDIVIDUALS WHO SERVE ON A
NONPROFIT BOARD**

AMONG THOSE WHO VOLUNTEER

Millennials



17%

Older than millennials

25%

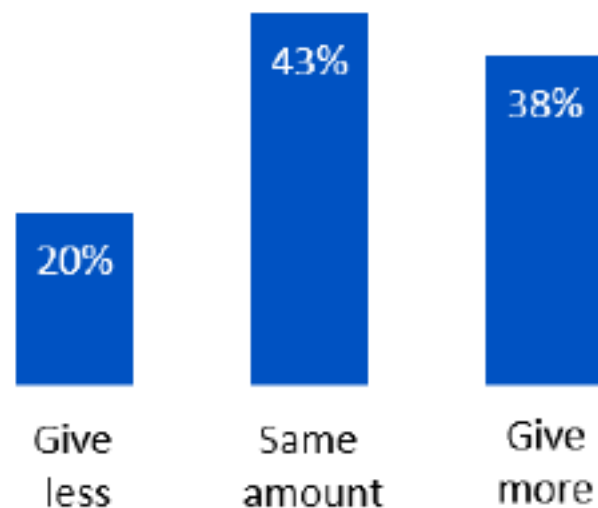
**NUMBER OF DIFFERENT ORGANIZATIONS TO
WHICH HIGH NET WORTH HOUSEHOLDS GIVE
AMONG THOSE THAT GAVE IN 2017**



Source: 2018 US Trust Study of High Net Worth Philanthropy

PERCENT OF BOARD MEMBERS WHO GIVE MORE, LESS OR THE SAME TO ORGANIZATIONS WHERE THEY HAVE A BOARD SEAT

AMONG THOSE SERVING ON A NONPROFIT BOARD



Board Member Giving

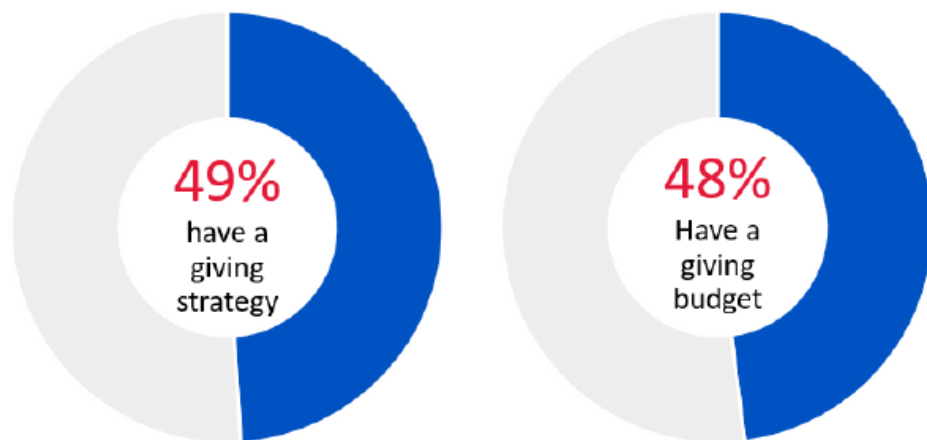
TOP REASONS BOARD MEMBERS GIVE THE LEVEL THEY DO TO ORGANIZATIONS ON WHICH THEY HAVE A BOARD SEAT



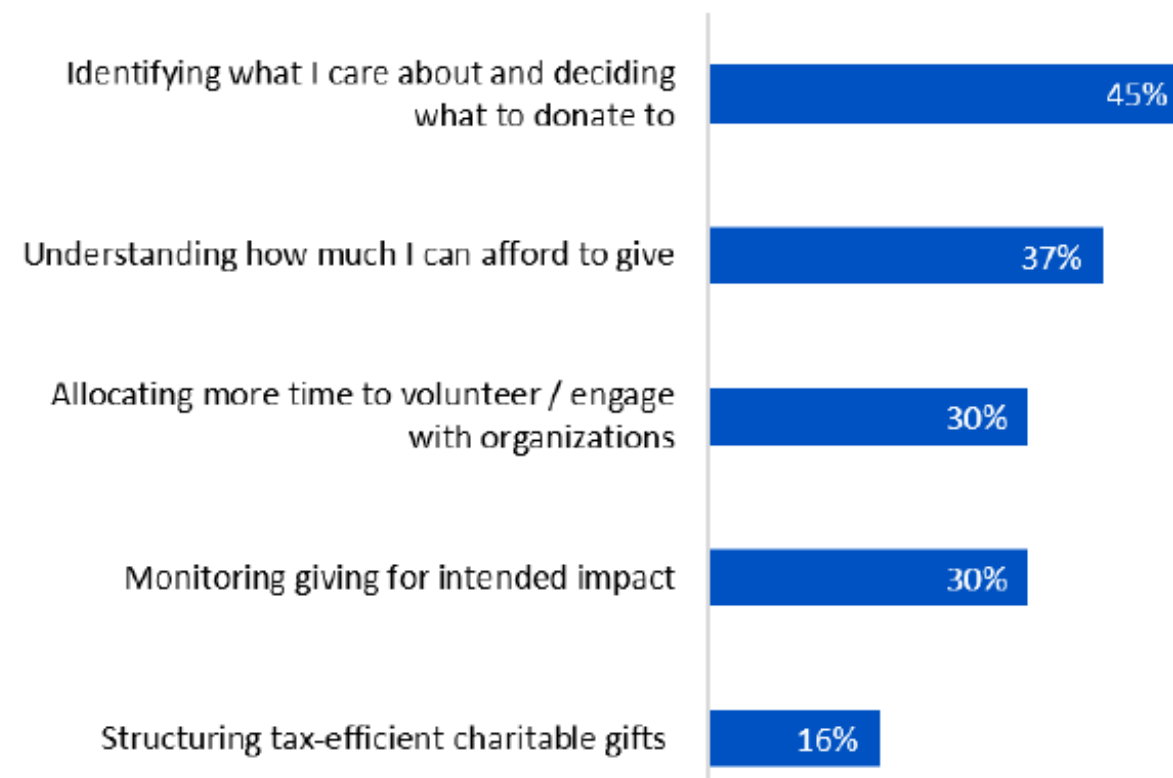
Source: 2018 US Trust Study of High Net Worth Philanthropy

Decision Making

PERCENT WHO HAVE A GIVING STRATEGY OR BUDGET AMONG ALL RESPONDENTS

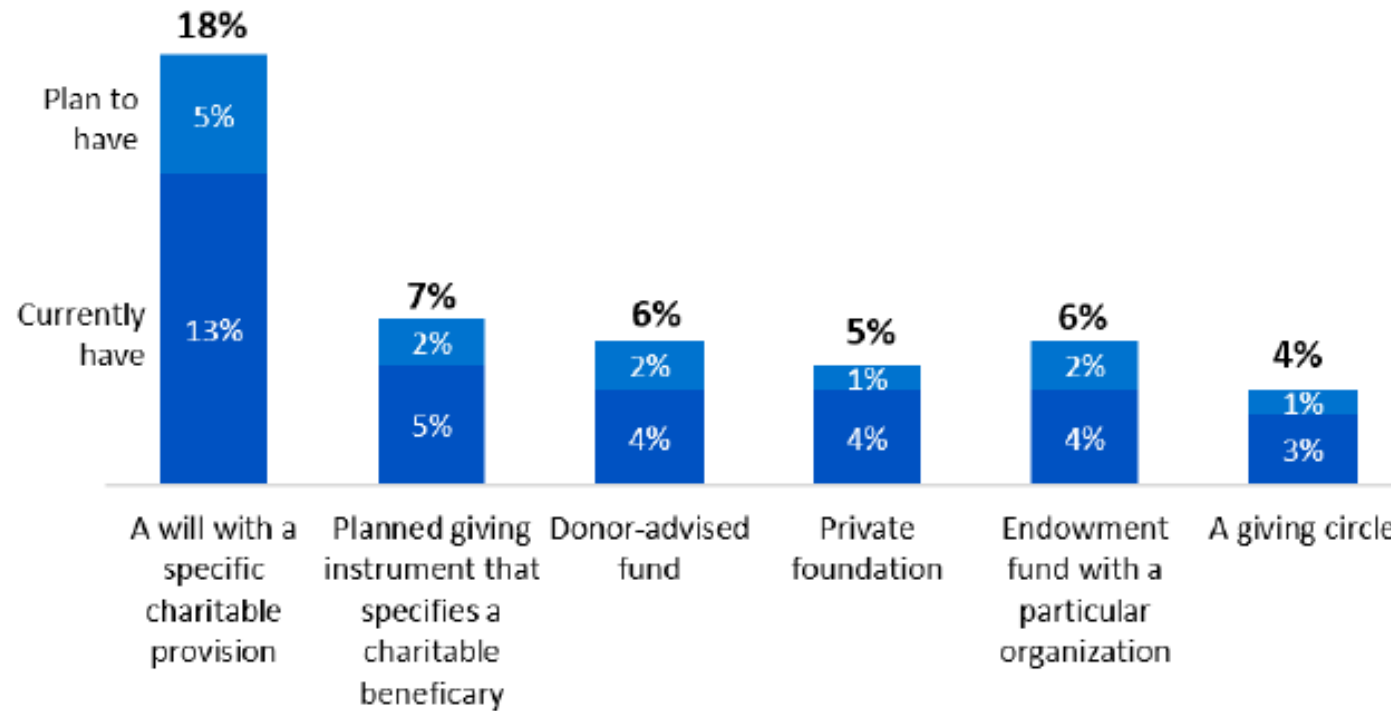


CHALLENGES TO CHARITABLE DECISION-MAKING PERCENTAGE OF THOSE WHO IDENTIFIED AS CHALLENGING



Estate Giving

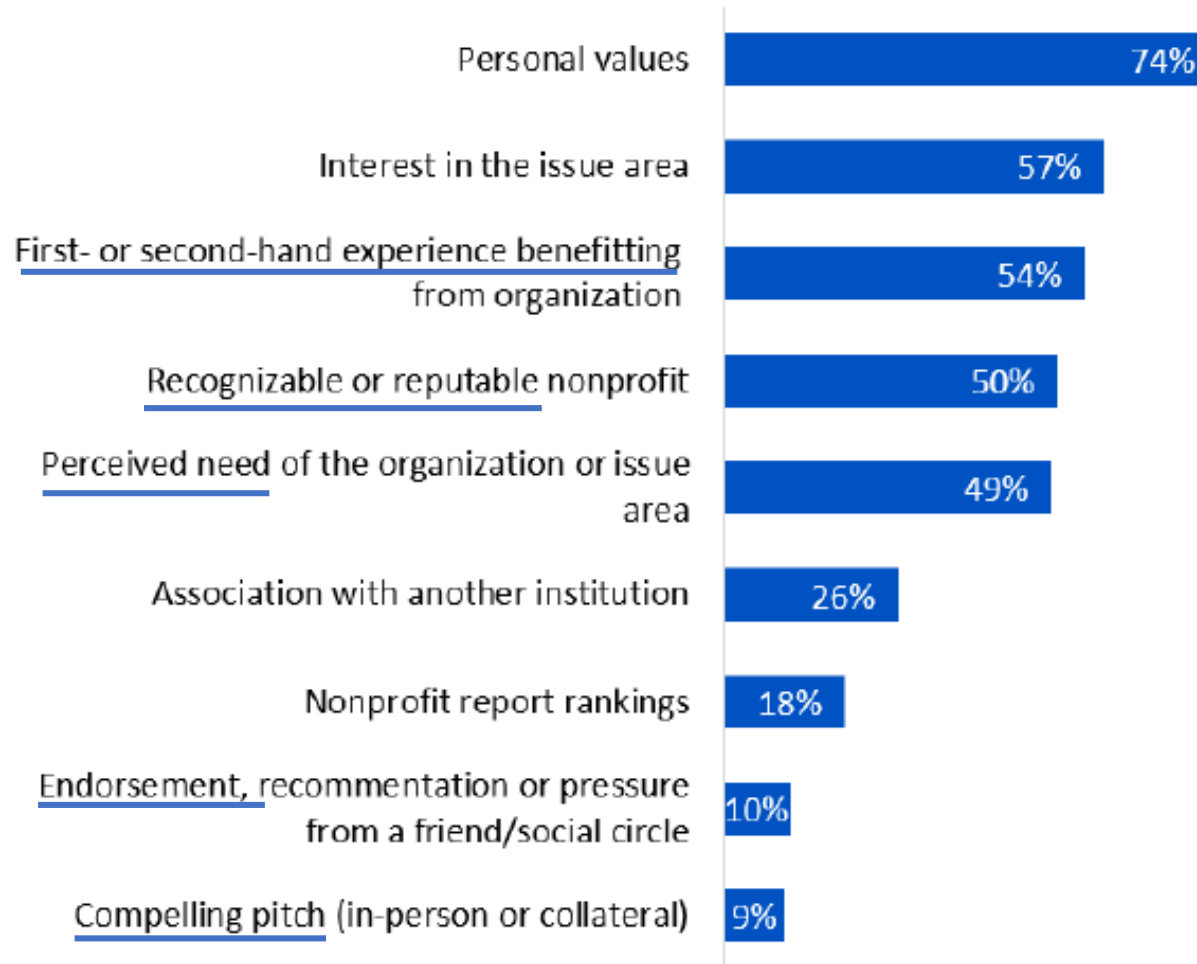
PERCENT WHO CURRENTLY HAVE, OR HAVE PLANS TO ESTABLISH, GIVING VEHICLES FOR MAKING CHARITABLE GIFTS



Source: 2018 US Trust Study of High Net Worth Philanthropy

**FACTORS THAT LED, OR WOULD LEAD IN THE FUTURE, TO DECISIONS
ABOUT CONTRIBUTING TO A PARTICULAR CAUSE OR ORGANIZATION
AMONG ALL RESPONDENTS**

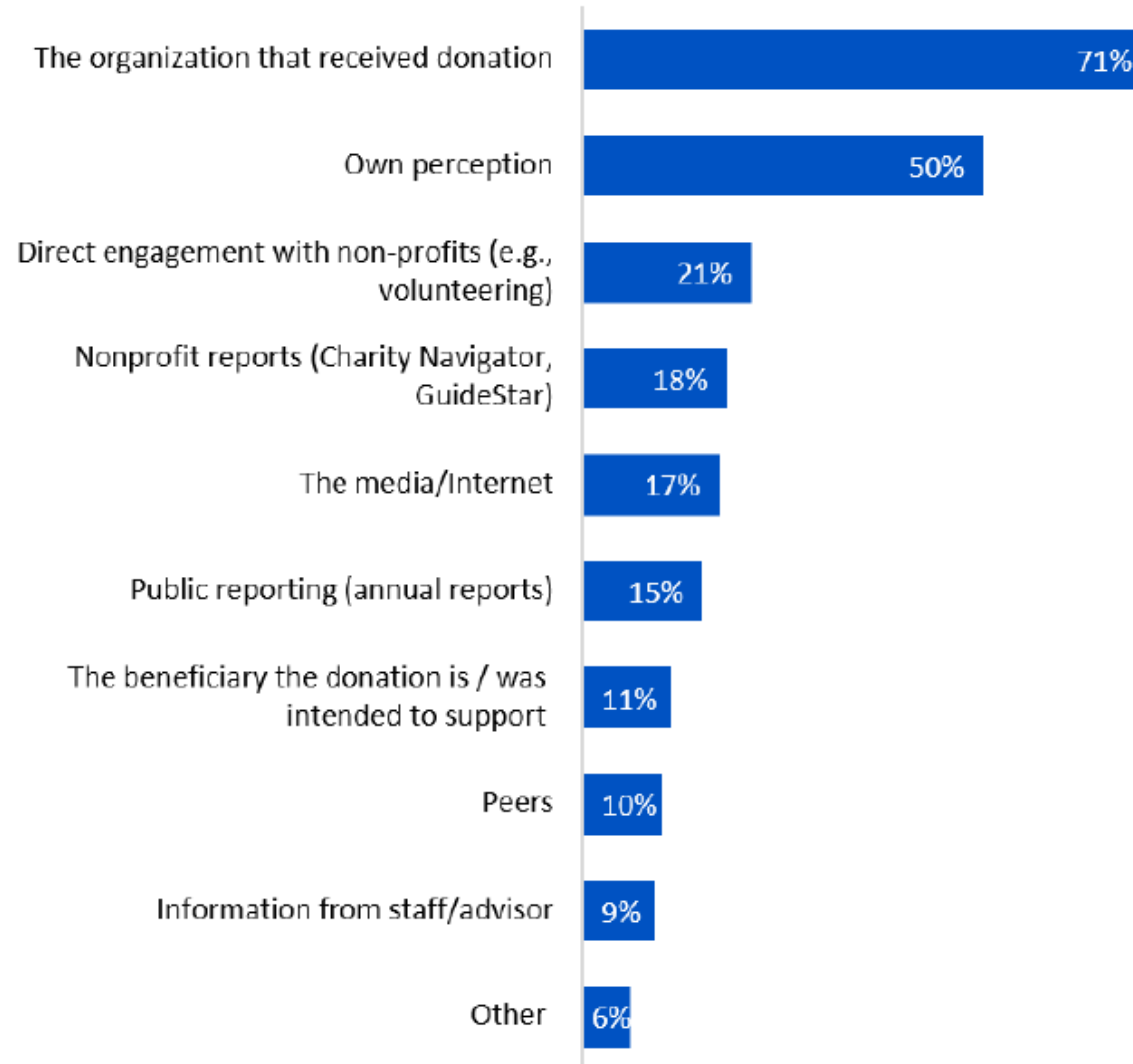
Giving Motivation



Source: 2018 US Trust Study of High Net Worth Philanthropy

WHERE HIGH NET WORTH DONORS SEEK INFORMATION ON THE IMPACT OF THEIR CHARITABLE GIVING

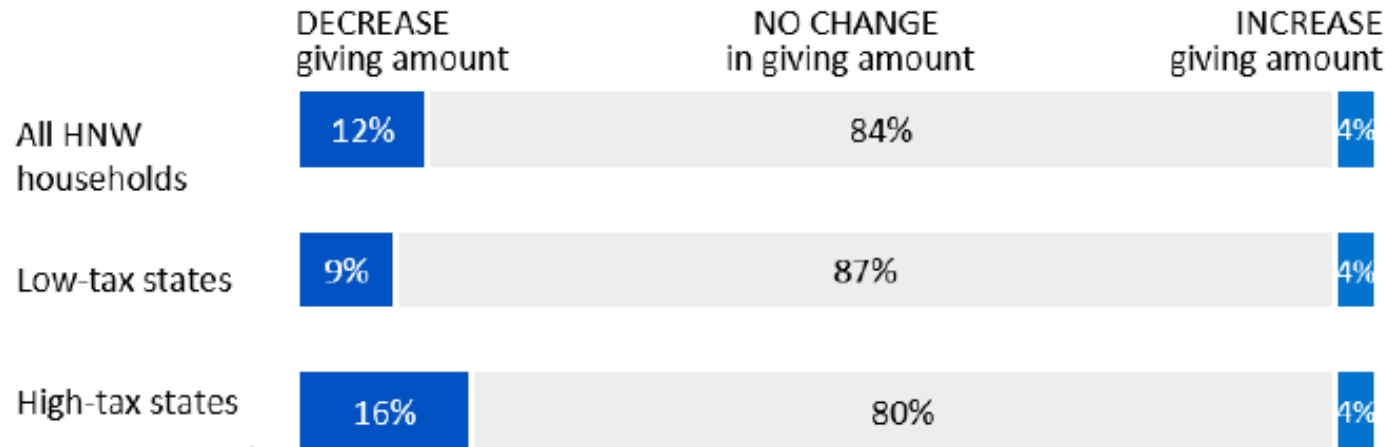
Impact Information



Source: 2018 US Trust Study of High Net Worth Philanthropy

PERCENT WHO EXPECT TO INCREASE, DECREASE OR NOT CHANGE 2018 CHARITABLE GIVING AMOUNT BECAUSE OF TAX LAW CHANGES

New Tax Law



High tax states

- New Jersey
- Maryland
- Washington DC
- California
- Connecticut
- New York

Source: 2018 US Trust Study of High Net Worth Philanthropy

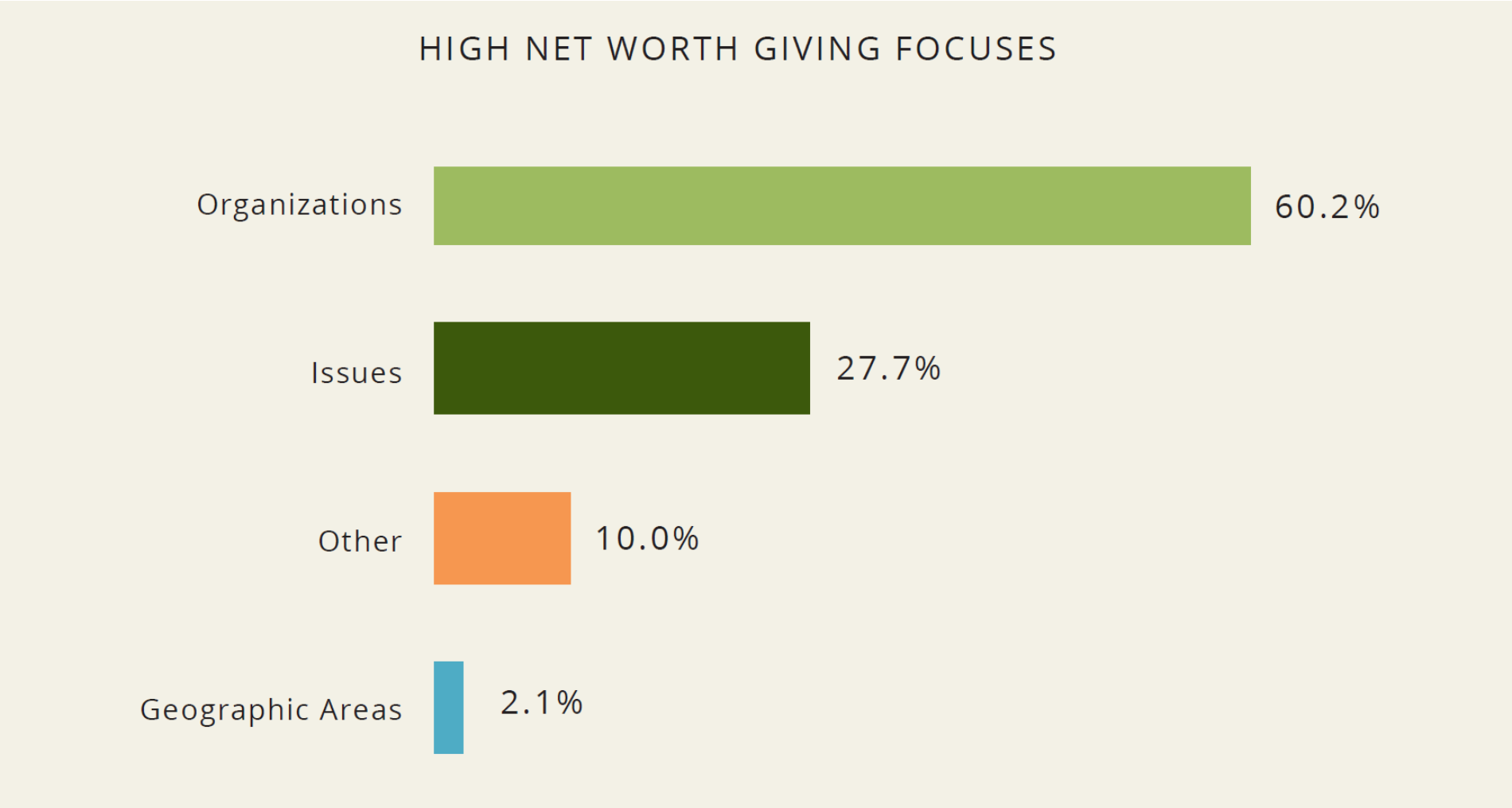
Why volunteer

HIGH NET WORTH DONORS REPORTING VOLUNTEERING BASED ON MOTIVATION TYPE



Source: 2016 US Trust Study of High Net Worth Philanthropy

Organization vs. cause



Source: 2016 US Trust Study of High Net Worth Philanthropy

Giving motivation

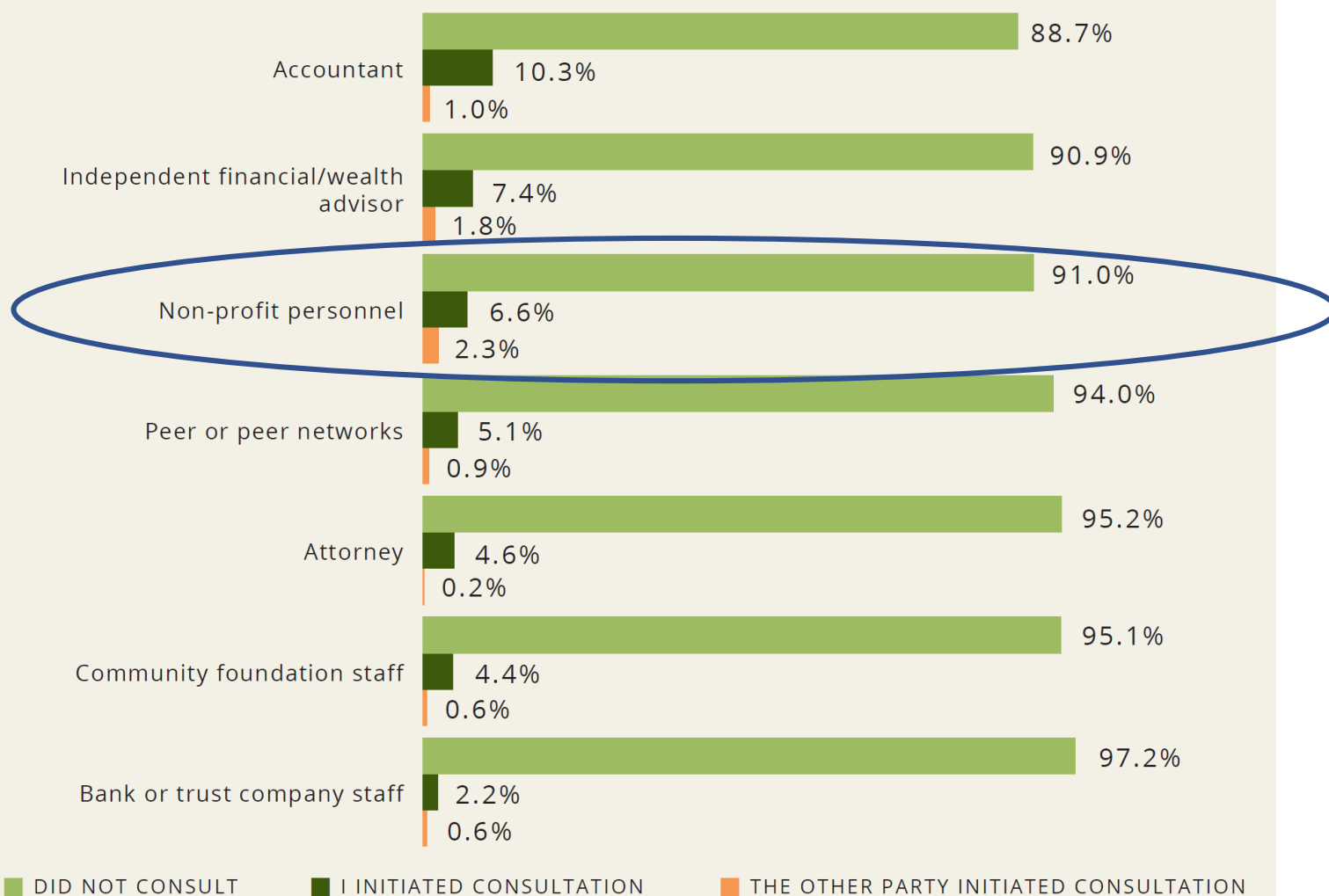
"On a scale of 1 to 5 do you usually give..."



Source: 2014 US Trust Study of High Net Worth Philanthropy

Influencers

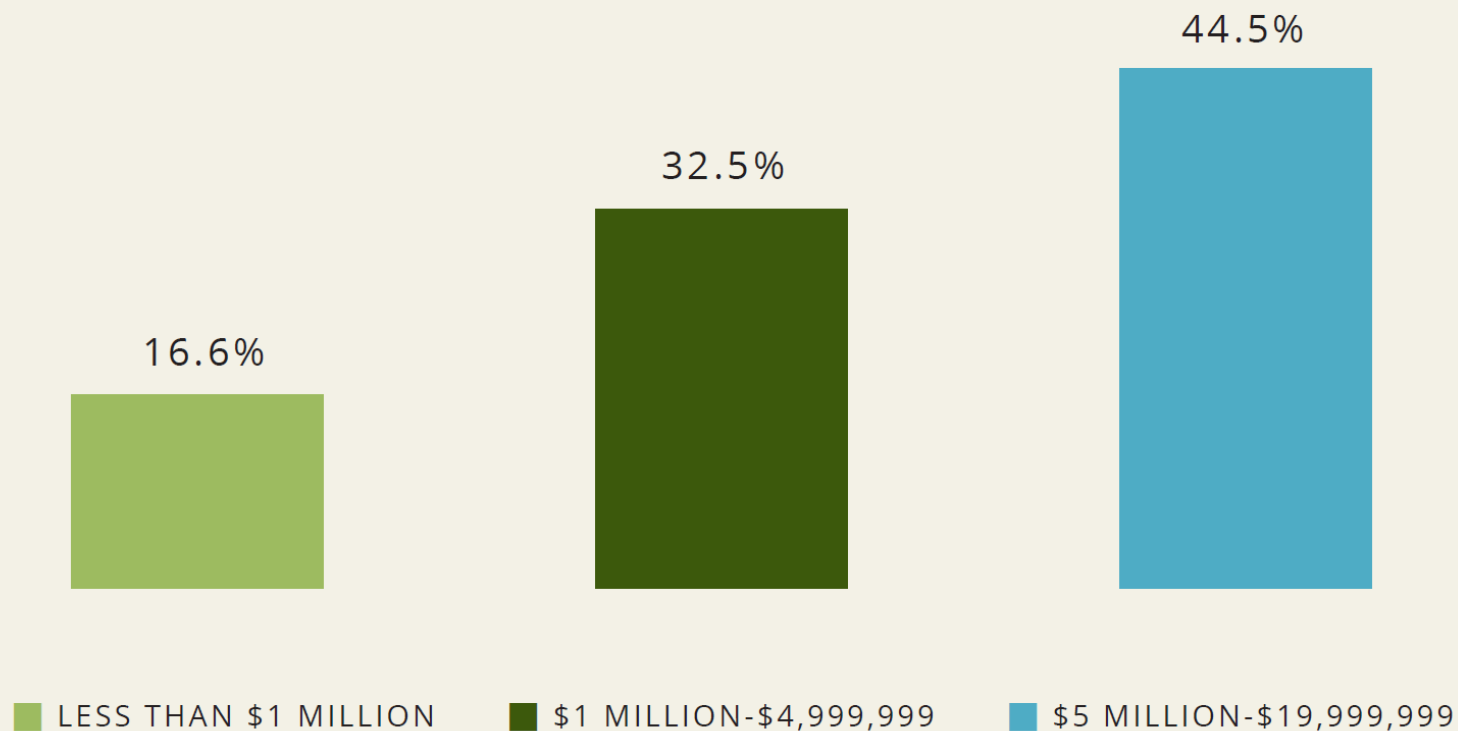
HIGH NET WORTH DONORS WHO CONSULTED WITH
AN ADVISOR BEFORE MAKING A CHARITABLE GIVING DECISION,
BY TYPE OF ADVISOR CONSULTED WITH



Source: 2016 US Trust Study of High Net Worth Philanthropy

Giving vehicles

HIGH NET WORTH DONOR USE OF GIVING VEHICLE BY TOTAL HOUSEHOLD NET WORTH*

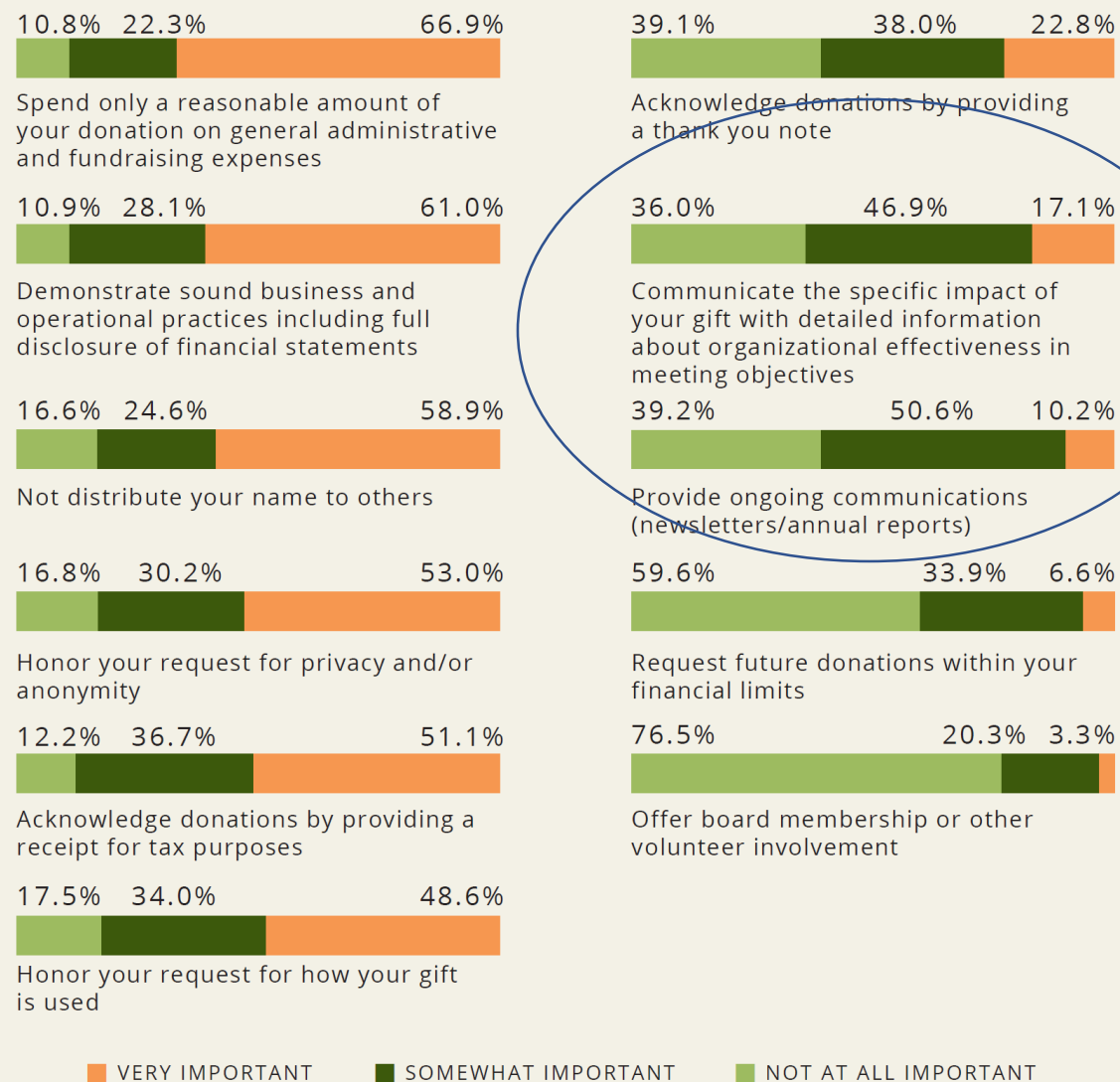


*Average giving amounts are calculated excluding ultra-high net worth households (those with a wealth level greater than \$20 million) because our data is only able to provide an aggregate value for giving by these households, not individual giving values. We cannot use an aggregate value when looking at individual characteristics, like net worth.

Source: 2016 US Trust Study of High Net Worth Philanthropy

Stewardship

FACTORS RANKED AS IMPORTANT TO HIGH NET WORTH HOUSEHOLDS AFTER MAKING A CHARITABLE GIFT





Building Rapport With Donors

Read the donor

1. Great Major Gift officers can “read” people. Most do this unconsciously. They are “**Unconscious Competents**”
2. We can all become “**Conscious Competents**” through basic education in Behavioral Type, Emotional Intelligence, and NLP.
3. 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.



What is rapport

1. **Rapport** is one of the most important features or characteristics of *unconscious* human interaction.
2. It is commonality of perspective, being in "**sync**," being on the same "wavelength" as the person with whom you are talking.
3. Rapport is the feeling of **harmonious connection** between people or groups of people.
4. Techniques to **build rapport** include: matching and mirroring your body language, voice tone and volume and descriptive language.
5. Rapport techniques can be learned and applied **intentionally** to increase relationship success.



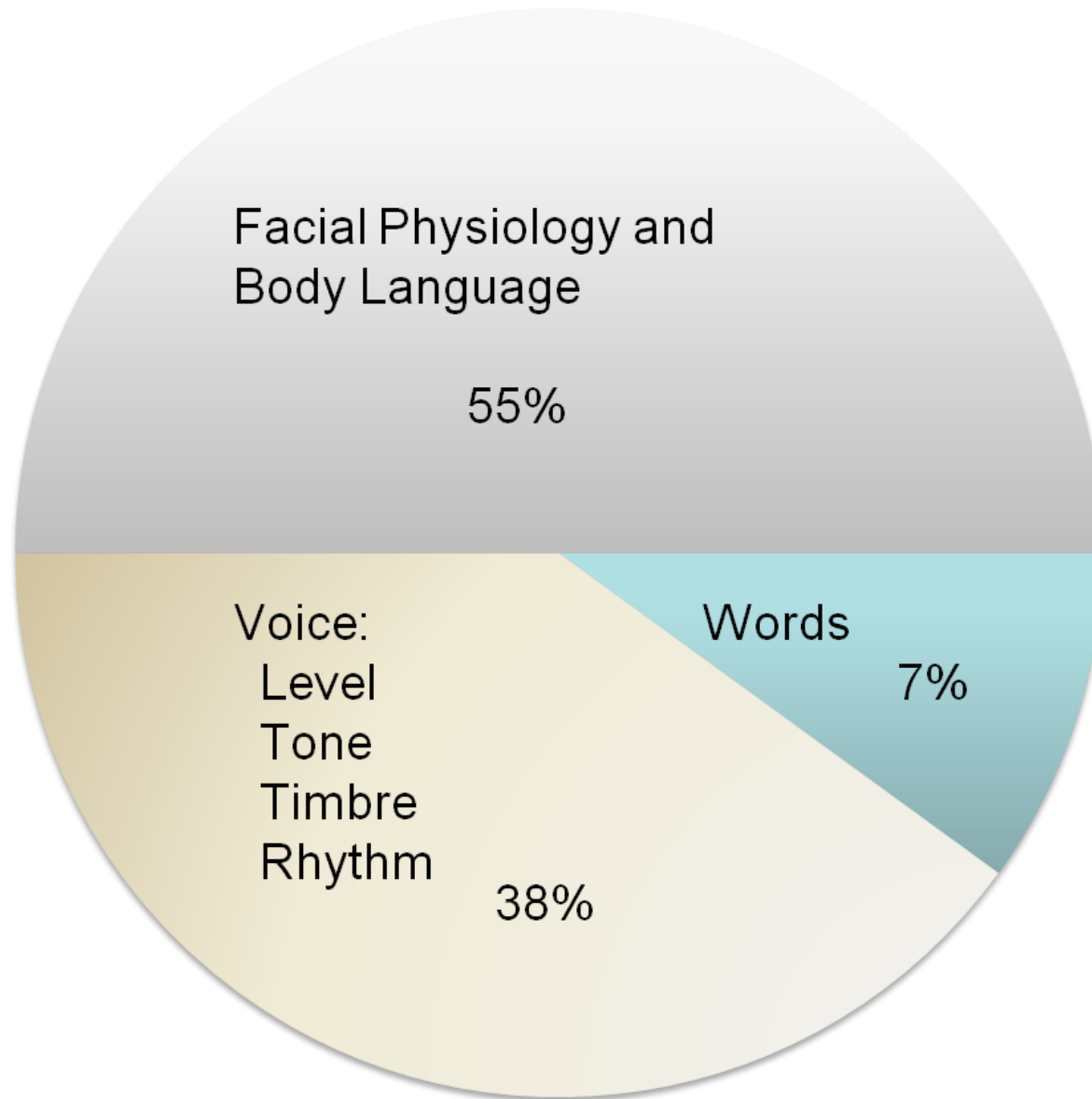
Neuro-linguistic programming

Neuro-Linguistic Programming embraces three simple concepts.

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



Rapport complexities



Getting in synch

1. Smile and humor
2. Matching and mirroring your body language
3. Voice tone and volume
4. Descriptive language



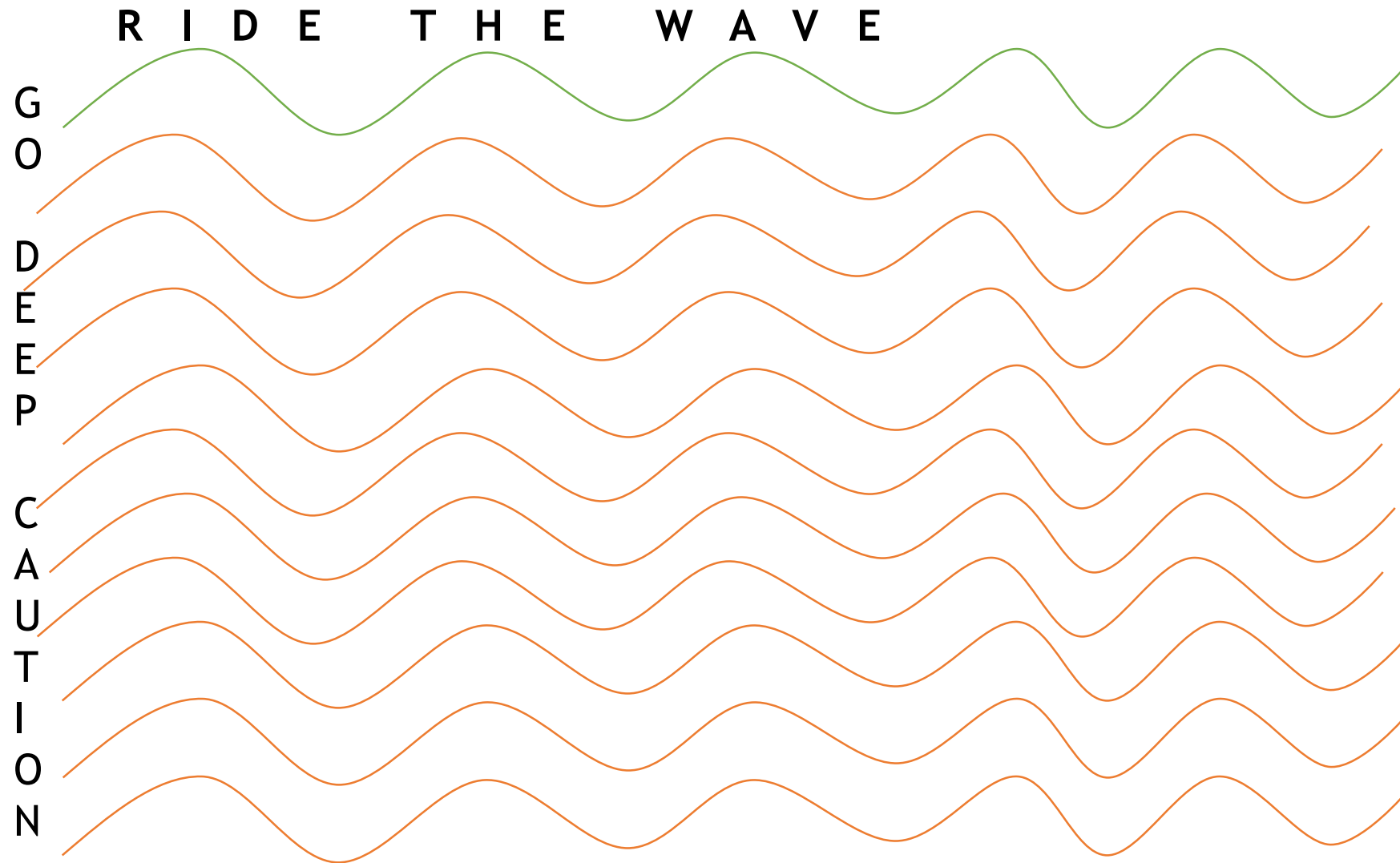
Non-verbal communication



Rapport = Likeability

We say yes to someone we *like*.

From rapport to relationship





Active listening

Work in pairs: Select Role A or B

Select a Role A (Speaker) or B (Listener)

- **Stage 1 (Silent, disinterested listener)**
 - A talk about “My First Job”
 - B Gives non-verbal cues expressing no interest, not listening
 - A Reports on experience receiving non-verbal disinterest
- **Stage 2 (Attentive Nonverbal listener)**
 - A continue to talk about first job.
 - B listens with sincere interest, without talking. (non-verbal cues only)
 - A reports experience of receiving non-verbal interest



Story
Time



Magnetic Resonance Imagery confirms--

1. The brain structures that trigger smiling activate dopamine to produce more smiling, pleasure, and an increased feeling of well being.
2. Dopamine deactivates negative emotions.

The power of a smile when you are all alone



Hallucinations

Make your own hallucinations

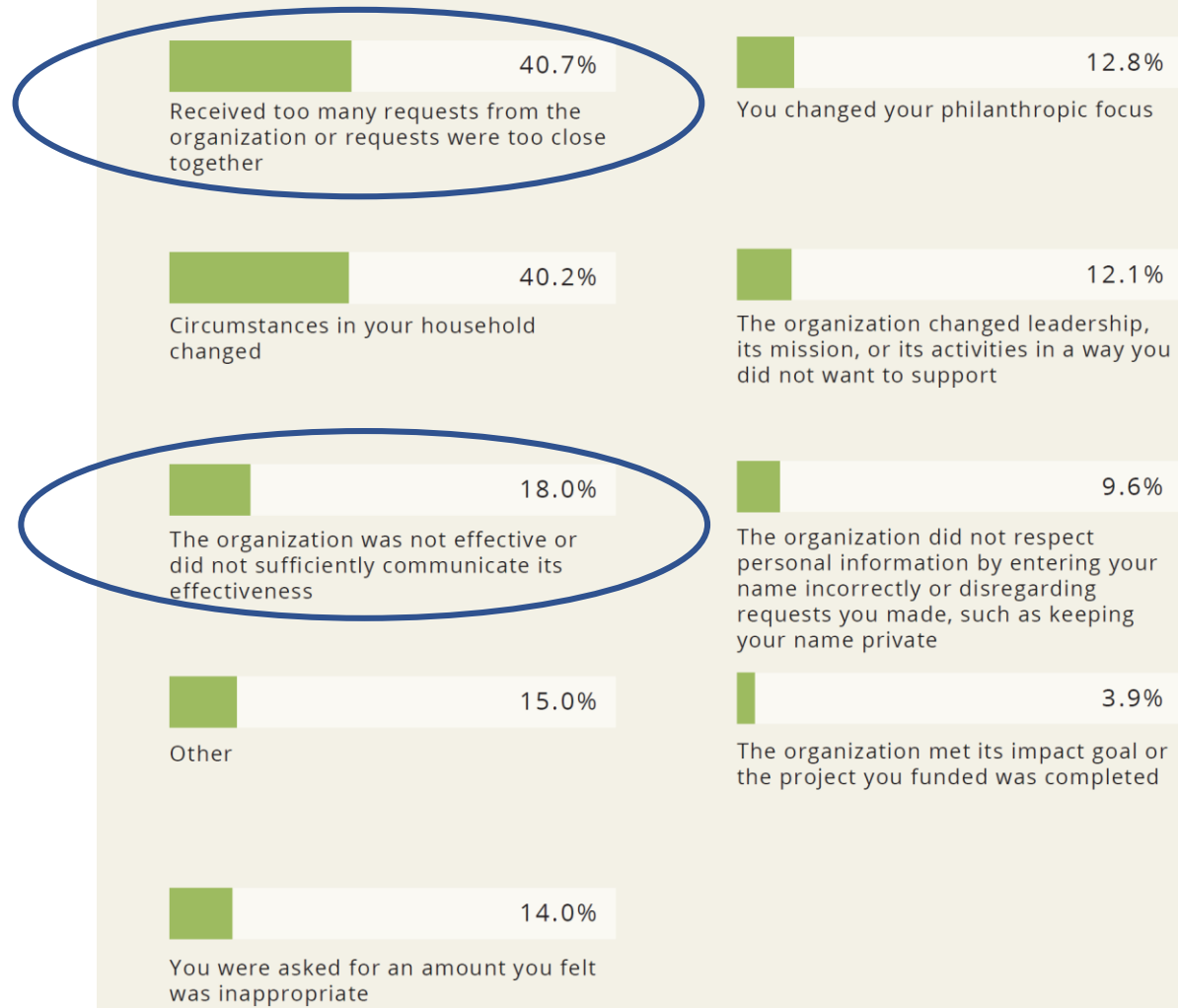
Worrying is the mis-use of imagination



Why we lose donors



REASONS WHY HIGH NET WORTH HOUSEHOLDS STOPPED SUPPORTING AN ORGANIZATION IN 2015 THAT THEY PREVIOUSLY SUPPORTED*



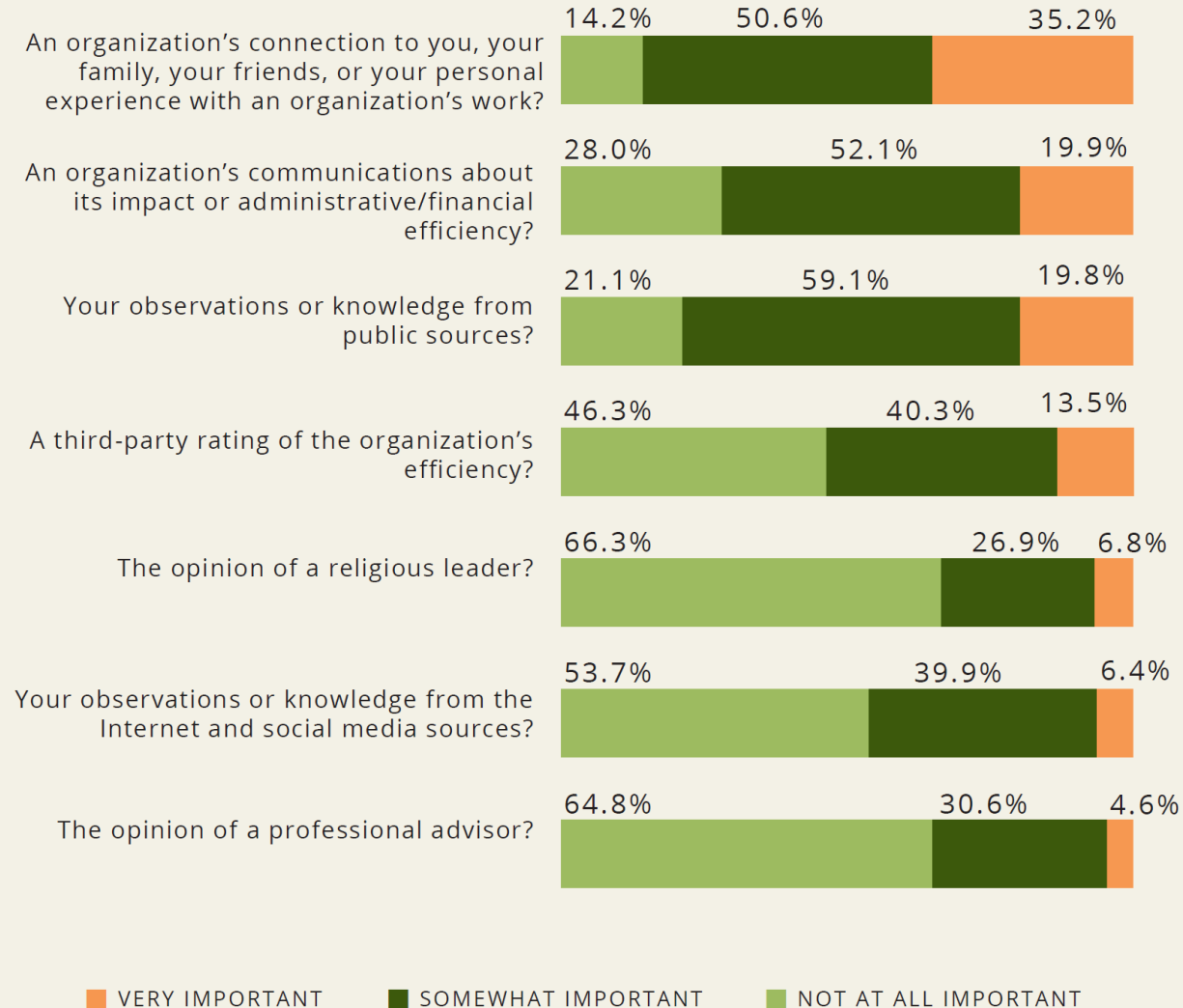
*The percentages in this figure are calculated only among those households that stopped giving to at least one organization in 2015.

Why HNWH stop giving

Source: 2016 US Trust Study of High Net Worth Philanthropy

Informing donors

PERCENTAGE OF HIGH NET WORTH DONORS WHO USE ORGANIZATION-BASED INFORMATION



Pipeline development



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 Advancement

Donor candidate sources

1. **Annual Giving:** Recurring and growing support from a larger number of new and past donors every year, including alumni, grateful patients, subscribers, event attendees.
2. **Direct Mail:** Reaching large numbers of active and new donors in a way that educates, and bonds donors- filling the “pipeline”.
3. **Grateful Alumni / Patients:** Working with faculty / physicians to refer alumni / patients who are grateful and have capacity.
4. **Thank-You Calling (bonding):** Can combine with Direct Mail for a more personal touch.
5. **Special Events:** Best way to get the community involved, heightens visibility, makes new friends, identifies prospective donors.

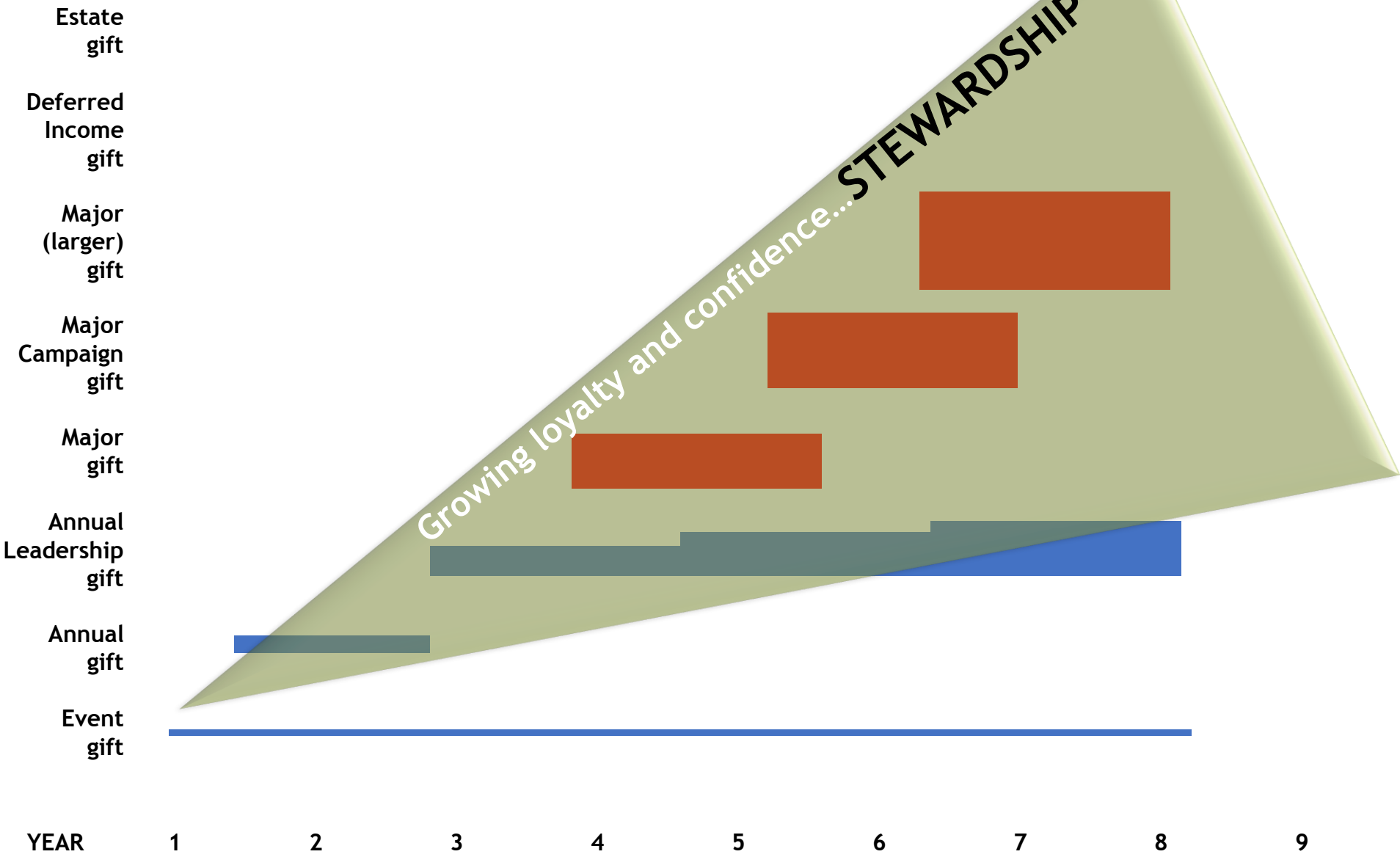


Donor candidate sources

6. **Corporate Giving:** Motivated by business objectives and being a good neighbor, annual gifts, event sponsorships, special projects.
7. **Major Gifts:** From individuals, an ongoing focused effort of authentic relationship-building and individualized attention that results in stretch commitments.
8. **Advancement Support:** Grantwriting, networking with private and family foundations, typically for project support.
9. **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.
10. **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.



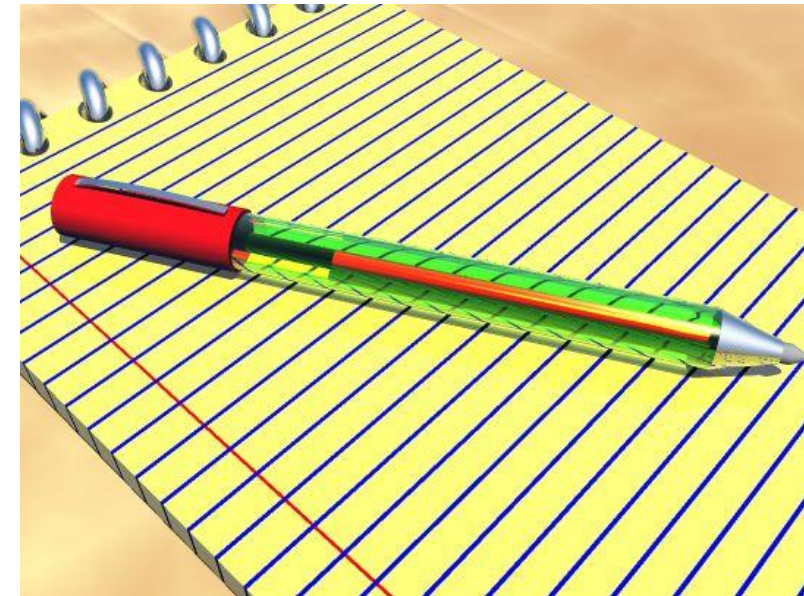
Donor
lifetime
value



Key behavior metrics/characteristics include:

1. Loyal donors / many gifts
2. Total giving
3. High average gift
4. High one-time gift
5. Researched capacity
6. Philanthropic behavior - giving to other organizations
7. Large political donor
8. Known to believe in mission

Building screening list



Relationship screening

SCREENER NAME: _____

WILLIAM SHATNER
Boston

☒ 1 2 3 4

K. D. LANG
Newton

1 ☒ 2 3 4

TOM BRADY
Brookline

1 2 ☒ 3 4

LAWRENCE O'DONNELL
Southy

1 ☒ 2 3 4

RACHEL MADDOW
Northhampton

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 relationship 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	
		Auxilery						4	3			3	
Daniel	Carol	Babcock		\$10,001 - \$25	1		1	1		3			
Emily		Barnes		\$10,001 - \$25	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	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

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

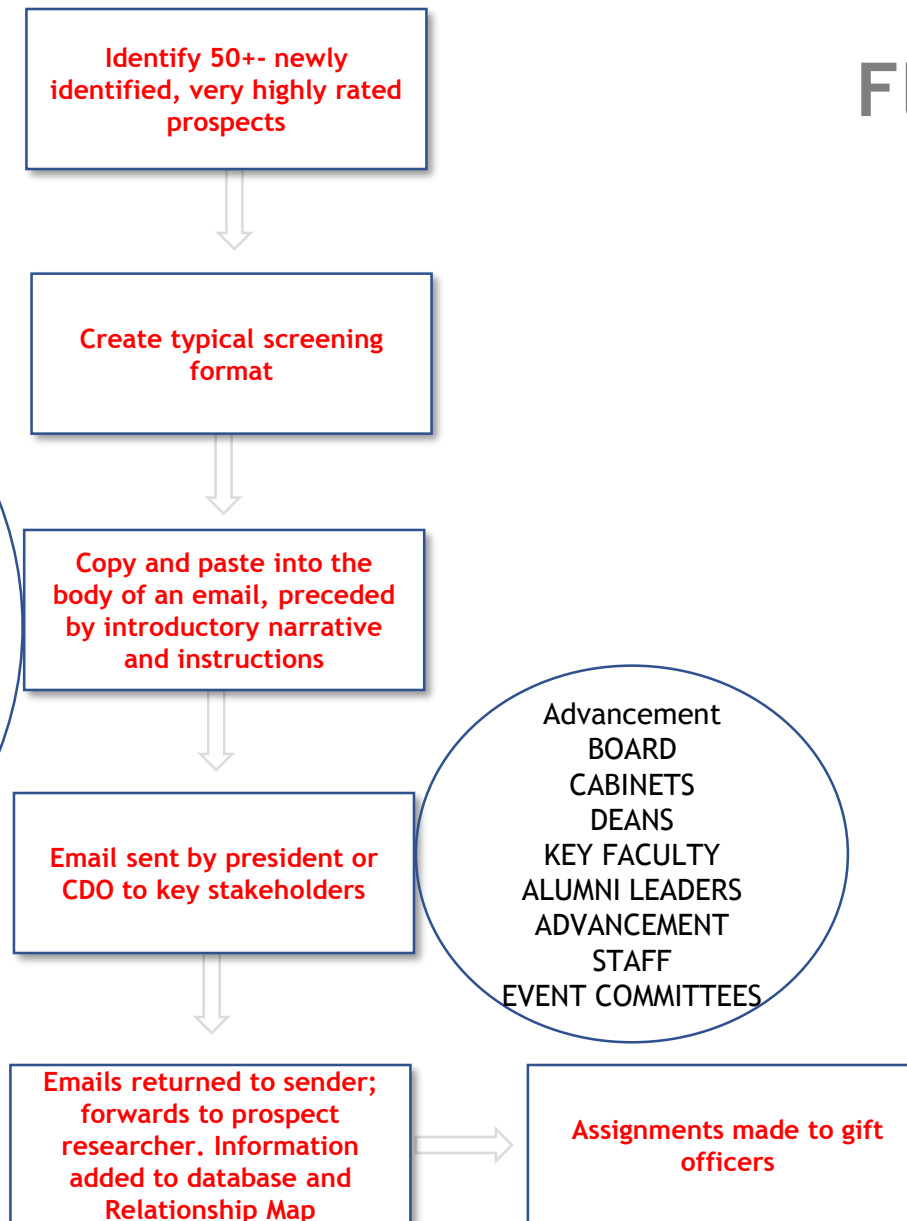
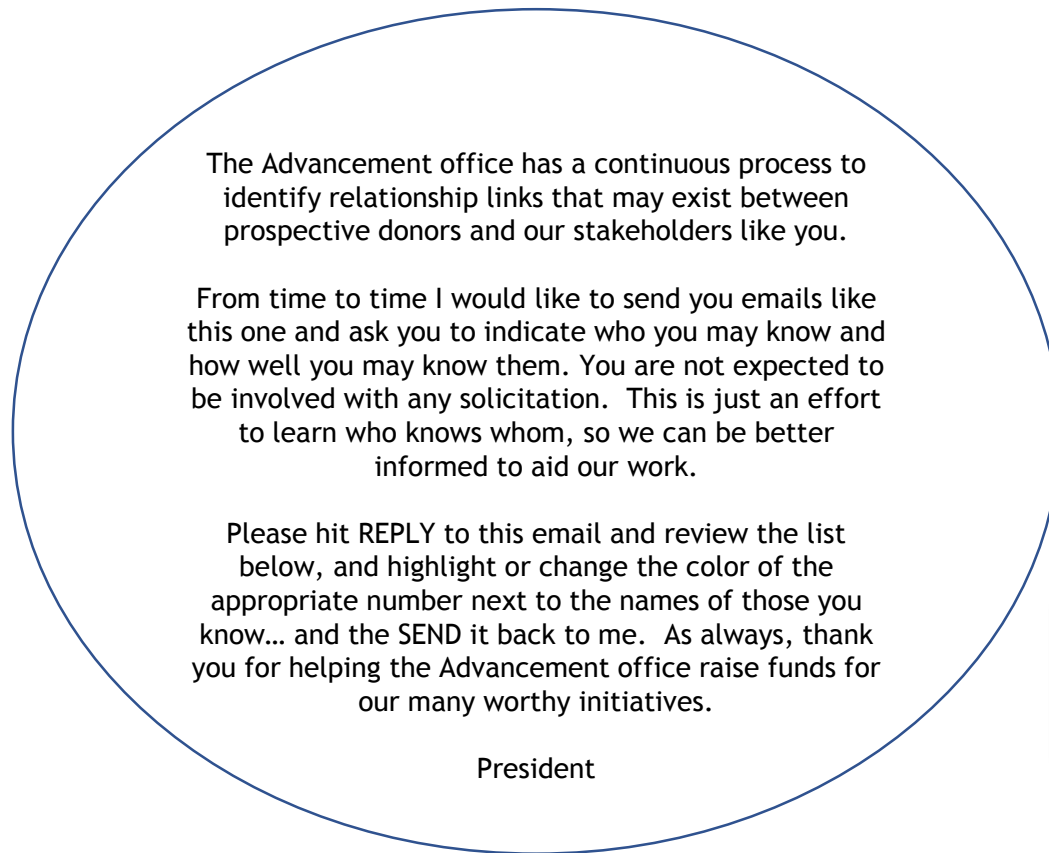
Relationship screening

WILLIAM SHATNER <hr/> Prospect for: Relationship manager: CRYSTAL		ANNIE 1	LOURDES JC 3 JUSTO 3 LIANA 3	
--	--	---------	------------------------------------	--

K.D. LANG <hr/> Prospect for: Relationship manager: KATHY		JAMIE 3 SEAN 2 CHRISTOPHER 4	JUSTO 1 JAMIE 3	
--	--	------------------------------------	--------------------	--

RACHEL MADDOW <hr/> Prospect for: Relationship manager: TOM		BILL 1	LIANA 3 BILLY 2 KRISTINE 1	
--	--	--------	----------------------------------	--

Flash screening



Short list

1. Always have a list of potential prospects on your mind.
2. Believe in 3-degrees of separation to your target.
3. At every opportunity, ask about a connection to the “suspect” from the volunteer / donor / board member if they know someone on the list
4. *Find the connection...it's fun*





Truism 3

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



Yogi Bear

Case for Investment

1. Value proposition
2. Urgent
3. Compelling argument
4. Who benefits
5. Cause and Effect
6. Why your organization
7. Customize for each constituency

- Annual Giving
- Major Giving
- Campaign
- Planned Giving
- Endowment Giving



Legacy recognition opportunities

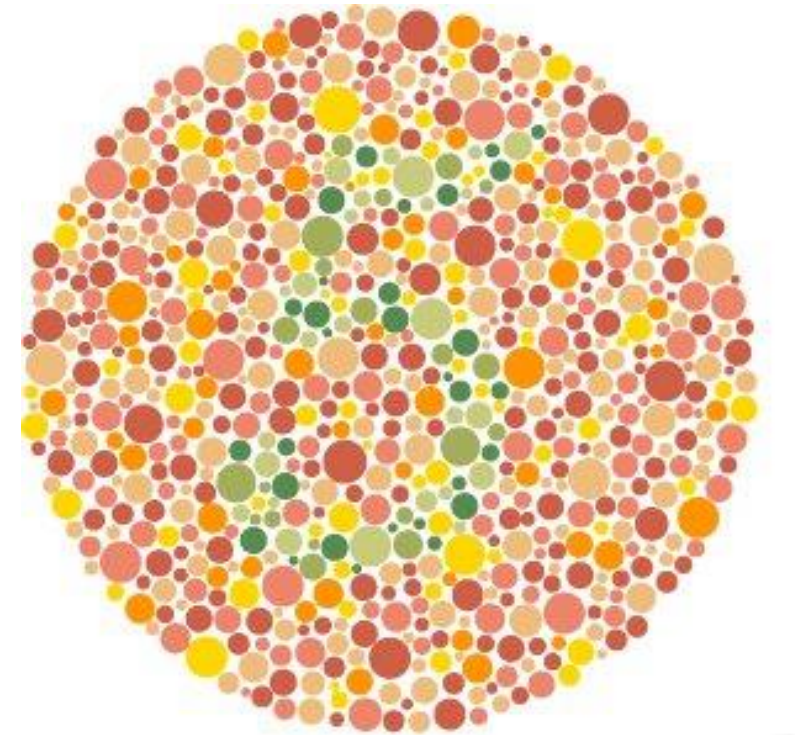


MCI Campus and Cancer Institute Pavilion	\$150,000,000
Miami Cancer Institute Pavilion	\$50,000,000
Research Building and Programs	\$30,000,000
Proton Therapy Building and Program	\$25,000,000
Breast Cancer Program	\$15,000,000
Clinical Research Program	\$15,000,000
Patient Parking Structure	\$15,000,000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



Test your case

1. Do your own feasibility study.
2. Visit with associates, donors, alumni leaders.
3. Ask them to help you and react to the case statement.
4. Tell them you will not be asking for a gift ... yet.
5. Report back to advancement leadership with your feedback.



Relationship objectives

1. Increase involvement through the finance committee.
2. Invite onto the parents / alumni / corporate advisory committee.
3. Introduce to the president or dean 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

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



Donor relationship management

	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
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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

Stewardship trackers

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 gifts*

	APRIL	MAY	JUNE	JULY
RELATIONSHIP MGR #1				
DISCOVERY VISITS MADE	4	6	7	
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



350+ Gift Officer Respondents

GOAL

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

ASK

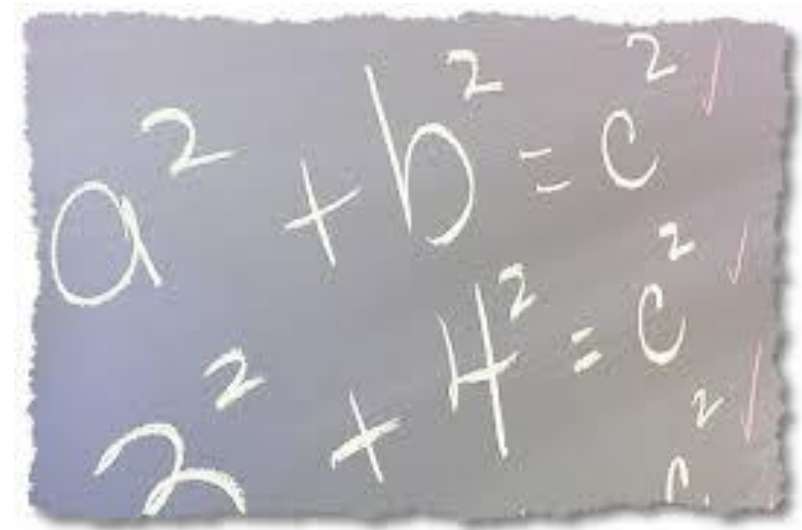
AVERAGE ASK	\$ 68,226
MEDIAN ASK	\$ 70,000
HIGH	\$ 180,000
LOW	\$ 25,000
RANGE	\$ 155,000

More information?



Most important variables

1. Are they philanthropic or transactional?
2. Prospect's relationship with the solicitors?
3. Capacity?
4. Involvement with the organization?
5. Giving loyalty
6. 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



350+ Gift Officer Respondents

Case #2

GOAL

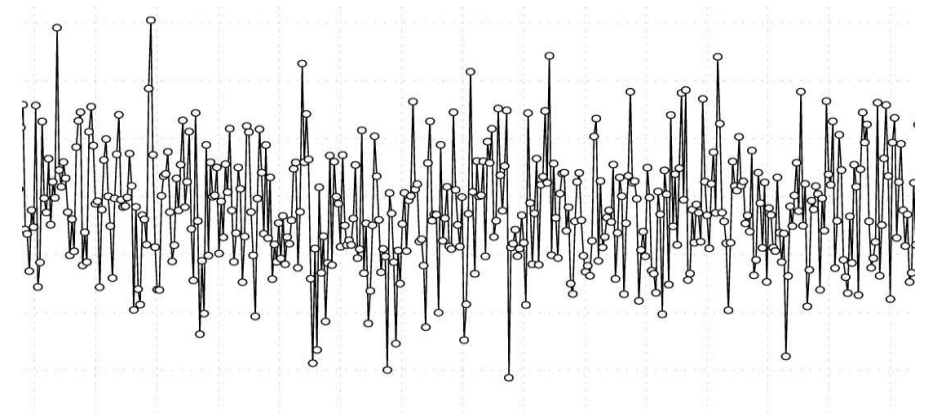
AVERAGE GOAL	\$ 308,036
MEDIAN GOAL	\$ 150,000
HIGH	\$ 2,000,000
LOW	\$ 50,000
RANGE	\$ 1,950,000

ASK

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

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.



Do your 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





Terrified

1



Put Off

2



Suspicious

3



Ambivalent

4



Sassy

5



Game

6

How are you feeling now?

