



January 2018

Ten Fundamentals of a Major Gift Program

WWS Fundraising Series 1





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TEN FUNDAMENTALS OF A MAJOR GIFT PROGRAM

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Ulrike Hoessle



I have found that among other benefits, giving liberates the soul of the givers.

Maya Angelou



INTRODUCTION

Fundraising is about more than just raising money. It's about connecting with people who share your organization's vision. It is an important validation of your mission, your values, and your work, and it gives your organization a platform to inform the community about the issues your organization cares about. Donor-centered fundraising with a major gifts program is by far the most efficient way to generate monetary support for an organization.

A well-planned major gifts program, which includes the following ten fundamentals, will result in a stronger base of supporters who promote and sustain your organization's mission with their talent, their expertise, and their engagement -- as well as with their money.

1. MAKE SURE YOUR LEADERSHIP IS COMMITTED TO THE MAJOR GIFTS PROGRAM

The leadership team must be willing to allocate funds and staff time to the major gifts program. Major donors may expect senior staff and board members to answer questions about the organization's programs, to make the ask, or to send thank you notes. Therefore, the leadership needs to be prepared for donor cultivation.

2. ESTABLISH HOW MANY MAJOR DONORS YOUR ORGANIZATION CAN CULTIVATE

A major gifts officer can cultivate 100 to 150 major donors. If you do not have a major gifts officer, you need to identify how many donors your staff, board members or volunteers can cultivate effectively.

3. IDENTIFY AND TRAIN STAFF, BOARD MEMBERS AND VOLUNTEERS

Those involved in the major gifts program need to know their roles, their tasks, how to craft messages and how to present your organization to your donors. There are multiple resources and webinars on different aspects of fundraising that you can discuss regularly during staff and board meetings or volunteer trainings.

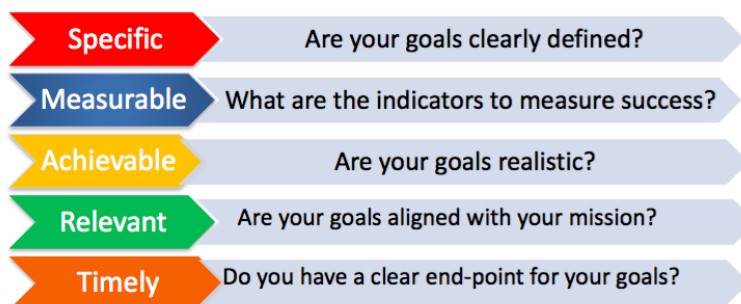
4. IDENTIFY DONORS WHO MAY QUALIFY AS MAJOR DONORS

Segment your donors by their contributions and identify the highest and most recent gifts. Also, go further back to find donors who have given larger amounts in previous years, or who were very engaged as board members, volunteers, or frequent visitors. Ask your board members, volunteers or staff about their friends and connections who might be interested in your cause. Then contact these potential major donors and ask them if they would like to meet with you and receive some updates.

5. SET REVENUE GOALS FOR EACH DONOR

Research your donors and their giving histories to other organizations and set **SMART** goals for the ask (SMART meaning: specific, measurable, attainable, relevant, timeframe).

SMART GOALS



6. CREATE A CULTIVATION STRATEGY FOR EACH DONOR

In general, there should be seven contacts between you and your donor before an ask. During this time, you get to know your donor, learn what inspires and interests him/her and engage personally with your donor. Donor cultivation primarily involves three different types of engagement activities:

- giving donors specific tasks
- inviting donors into deeper conversation
- asking donors to think on your behalf.

The activities to engage donors should be in line with your organization's mission and values.

Giving specific tasks:

- selecting wine for the gala
- writing a short post for the website why the donor supports your organization
- joining the interview process of interns
- asking for photos related to the scope of your work

Inviting into deeper conversation:

- to a *salon* to discuss the issues your organization is addressing
- to a focus group to explore who else might be part of the target audience and how your organization could connect with this audience
- to a Jeffersonian dinner with community leaders to build a sense of community and partnership around a shared interest or theme (see jeffersondinner.org)

Asking to think on your behalf:

- how your organization's communication could better reflect its culture and values
- how the new website (or newsletter) could better reflect your organization's mission
- comments on your organization's case statement and/or stewardship plan
- how to improve the design of your thank-you postcards or invitations to events
- finding the right donor management software
- doing research on questions related to your organization's mission.

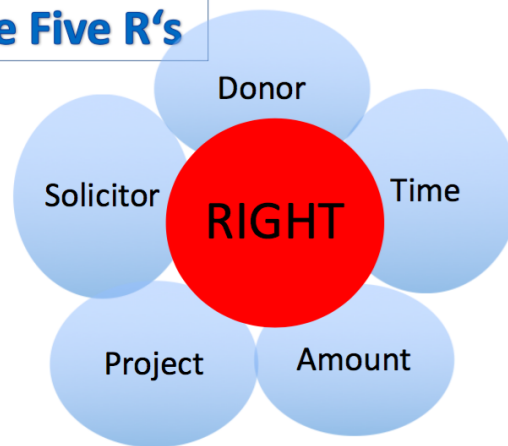
7. ASK DONORS FOR SUPPORT AND FOR A GIFT

Before you ask, make sure you have covered the 5R's: Right Person, Right Amount, Right Project, Right Time, Right Solicitor. The solicitation should be inspiring and respectful, and focus on why you are doing what you are doing, instead of listing what you are doing.

Your message should avoid numbers and statistics; however, it should include one personal, unresolved story that shows what problem is addressed and why the donation is needed. The message should focus on the donor, using the pronoun you when you speak, and not

on your organization, avoiding we. The decision to donate to your organization will be motivated primarily by feelings and secondarily by rational reasoning.

The Five R's



8. THANK DONORS

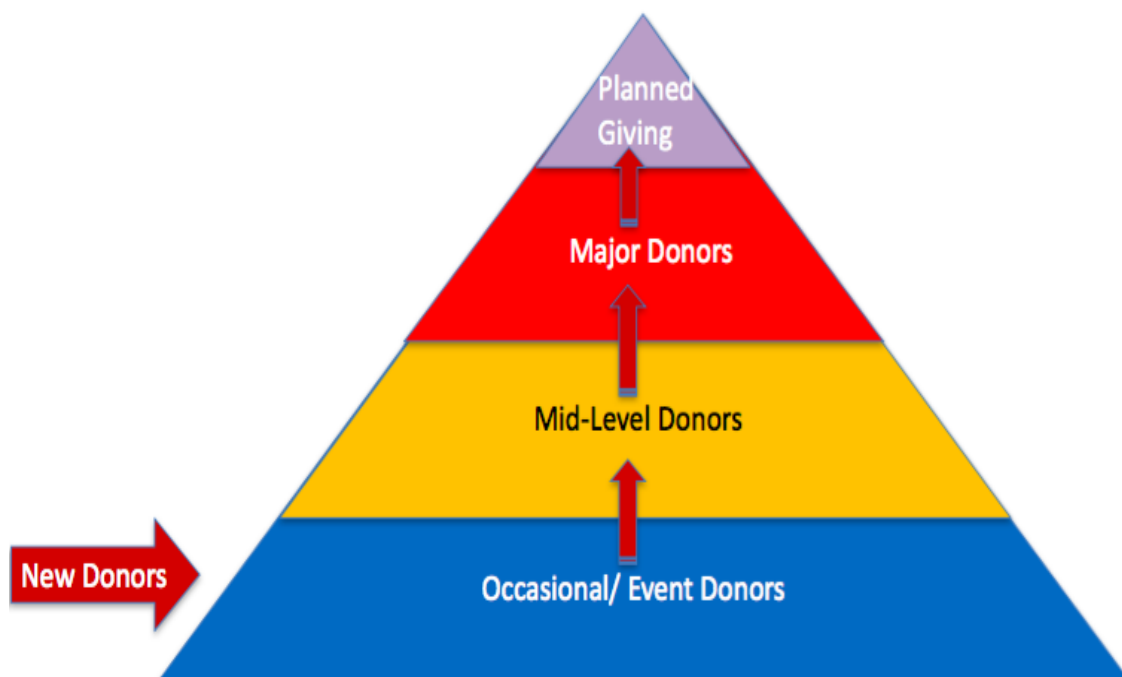
After giving money, donors expect a prompt, personal and meaningful thank you note and the assurance that the gift will be spent as intended. The recognition should reflect the mission and vision of the organization. When writing the thank you letter, use feelings rather than facts, stories rather than statistics.

9. REPORT BACK TO THE DONORS ABOUT HOW THEIR GIFT MADE A DIFFERENCE

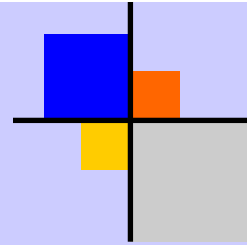
A “proof of impact” letter should be sent out six to nine months after a gift is made. Accountability needs to be an integral part of your program. Therefore, the major gifts officer needs to stay informed about highlights and milestones your organization has accomplished. This follow-up facilitates and helps with future donor requests.

10. CONTINUE TO IDENTIFY OTHER POTENTIAL MAJOR DONORS FROM YOUR MID-LEVEL DONORS

Major donors may drop out for reasons that are out of your control. Therefore, you should continuously identify potential new major donors by researching and cultivating your mid-level donors. The ultimate goal of fundraising is to attract new donors and move your current donors up the donor pyramid. Eventually, your major donors might consider including your organization in their will.



A major donor is someone who...



- has a deep interest and passion in your cause.
- is already in your database.
- is already part of your top donors.
- is a frequent giver.
- has been giving to your non-profit for over three years.
- is a current or previous board/committee member or volunteer.
- has the financial resources for a major gift.
- is interested in a deeper relationship with your organization.

FINAL REMARKS

A major gifts program is the most important component of a fundraising strategy. On average, single donations account for 80% of a non-profit's revenue, and 88% of total donations come from 12% of donors. However, only 40% of non-profits have a major gift strategy (see Bloomerang 2018). Although it may take a while to build a major gift program, there are substantial long-term benefits for your non-profit. The Ten Fundamentals of a Major Gift Program outlined here will not only increase your revenues, but will also strengthen your overall base of supporters, attract new donors and incentivize your current donors to raise the level of their donations.

WEBINARS ON FUNDRAISING STRATEGIES

Axelrad, Claire: How to Build and Sustain Your Major Gifts Pipeline. <http://bit.ly/2DJ6Ky7>

Davenport, Chris with Steven Shattuck: How to Segment Your Donors (Movie Mondays).
<http://bit.ly/2BrztT8>

Eisenstein, Amy: How Big is a Major Gift for Your Nonprofit? | Major Gifts Challenge.
<http://bit.ly/2DGc7in>

Howlett, Susan: Engaging Board Members in authentic leadership. <https://vimeo.com/73467301>

BOOKS AND ARTICLES ON MAJOR GIFTS

Bloomerang (2018): By the Numbers: Major Gift Fundraising. <http://bit.ly/1ImxQ9t>

Calhoun, Peggy A. /Miller, Richard G. (2004): Asking for Major Gifts. Steps to a Successful Solicitation (=AFP's Ready Reference Series Association of Fundraising Professionals). Arlington: AFP.

Greenhoe, John (2013): Opening the Door to Major Gifts: Mastering the Discovery Call. Nashville: CharityChannel Press.

Love, Jay B. (no year): Major Gift Fundraising for Small Non-Profits. A Step-By-Step Guide to developing donor relationship that stick and pay off. Indianapolis: Bloomerang.

Panas, Jerold (2016): The Fundraiser's Measuring Stick: Sizing Up the Attributes Board Members, Volunteers, and Staff Must Cultivate to Secure Major Gifts. Medfield: Emerson & Church Publishers.

Perry, Richard/Schreifels, Jeff (2014): It's not just about money. How to build authentic donor relationships. CreateSpace Independent Publishing Platform.

Perry, Richard/Schreifels, Jeff (no year): Creating Strategic Plans and Goals for Every Major Donor. Philadelphia: Veritus Group.

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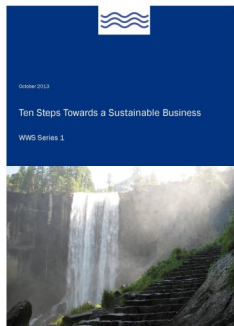
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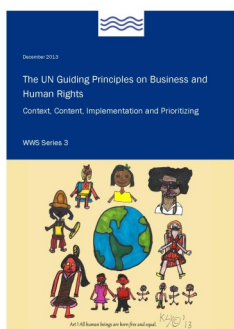
@wwssustainable

Check out the WWS publications on Business & Human Rights:



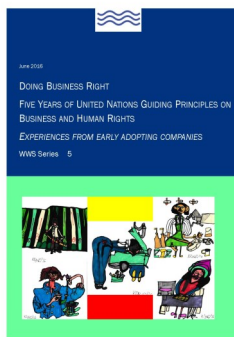
Ten Steps Towards a Sustainable Business

To put sustainability into business practice is a comprehensive, long-term process that involves many stakeholders, measures, and issues and leads to a continuous restructuring of how a business operates. This process is not a simple, linear process, rather, it is a long, continuous journey with detours and obstacles where the final destination lies far ahead. What matters are the steps in the right direction toward a sustainable business.



The UN Guiding Principles on Business and Human Rights - Context, Content, Implementation and Prioritizing

What are the UN Guiding Principles on Business and Human Rights? Get familiar with the Guiding Principle's framework: Protect, Respect, Remedy, and the relevant human rights treaties and covenants on which they are based. Check out the relevant questions that might arise in the different departments of a company, depending on its activity and the countries of its operations.



Doing Business Right —

Five Years of United Nations Guiding Principles on Business and Human Rights

Five years ago, the Human Rights Council approved the UN Guiding Principles on Business and Human Rights. Find out how governments created and implemented the first action plans and how five companies from five different sectors began to put these principles into action with different initiatives, challenges and lessons learned.



Reconciling Work and Life — Experiences from Germany

Reconciling Work and Life describes the long history of women as food providers, and the short history of women as housewives and mothers. It discusses the downside of the traditional family model, and the current challenges of “having it all”—and it presents the successes and challenges Germany has experienced in its efforts to reconcile work and family life.

