

## Finding Your Groove With Major Gift Cultivation

by David Allen  
Developed for  
Madison Non Profit Day  
28 October 2013



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## Outline for the Session

- Introductions
- Frank Talk About Money
- Decision-Making Dynamics: Why People Give
- Major Gifts Vs. Major Donors
- How to Get Started
- Cultivation Basics
- Wrap



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## David Allen Development for Conservation

- 30 years raising money by asking
- 13 with TNC Chapters in OR, TX, and WI
- 10 with Sand County Foundation
- Door-to-Door canvassing to Membership Systems to \$18MM Capital Campaign
- Consulting since 2004



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## Thank You!

Stephen Covey,  
*Seven Habits of Highly Effective People*

Bill Sturtevant,  
Institute for Charitable Giving

The Nature Conservancy

Dan Burke & Laurel Hauser  
Door County Land Trust

Jeff Schreifels & Richard Perry  
Passionate Giving Blog



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## Frames of Reference

- Fundraising is about building relationships; only 10% is about “asking”
- All Board Members fundraise
- You have to give yourself to be effective as a fundraiser
- \$1,000 is not as much money as it used to be



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## Frank Talk About Money

- It is difficult to do much for less than \$20.
- Time is NOT the same as money.
- “I don’t have enough” time/money really means “I choose to spend my time/money elsewhere.”
- \$100 is – literally – pocket change for most people. Many take \$100 at a time from ATMs.



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## So....

- Regularly asking for \$100 is OK
- Almost everyone **could** give \$1,000 if they really wanted to
- Many people could give \$10,000 if they could spread payments out over time



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## So....

- If our belief that a donor cannot *afford* a \$1,000 gift prevents us from asking, that says more about us than about them.
- Don't say NO for people by not asking.



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## Board Campaign

### Board

- Chair, FR Chair, ED set Board goal
- Chair sets the tone, makes his/her gift first
- Chair solicits other Board members
- First Quarter Activity
- Pledges OK



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### *Fifty-Three Ways*

for Board Members to Raise \$1000

by Kim Klein



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## Why do People Give?

1. What's being done is worth doing
  - Belief in the Mission
2. The organization involved can get it done
  - Fiscal stability
  - Regard for staff leadership
  - Respect for the organization locally
  - Regard for volunteer leadership

## Definitions: Annual Gifts

Annual and Major (Gifts) describes the decision-making process, not the dollar amount.

Annual (periodic) Gifts require little, if any, deliberation by the donor.



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## Definitions: Annual Gifts

- Annual expectation (renewal)
- General organizational appeal (operations)
- Mail or phone solicitation
- Quick response
- Small(er) gift size
- Measure of success = YES



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## Definitions: Major Gifts

- Specific need
- Unique appeal
- Personal ask
- Multiple visits
- Large(r) gift size
- Measure of success = ADVANCE



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## Major Gift vs. Major Donor

- A major gift for the organization might be the lowest amount given by the topmost 10% of your donors.  
*(Top 100 or major donors)*
- A major gift for the donor might be the amount they have to think about before saying yes.



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## Ultimate (Planned) Gifts

- Long-term relationship with organization
- Organization is one of donor's only charities
- Desire to leave a legacy



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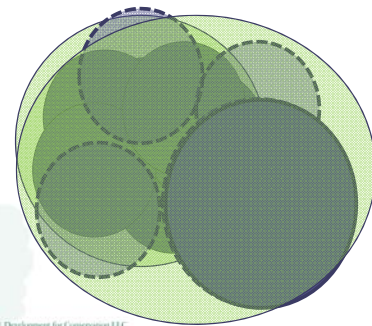
## Sustainability

Robust, resilient, sustainable organizations work with their donors on **annual gift, major gift, and planned gift** programs, all three, *at the same time* with systematic board member engagement and adequate staff support.



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## Access



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## Getting Started


Access?	Regular, Systematic Cultivation	Ready to Start "The Conversation"	Ready to be Asked
Major Gift Potential	•	•	•
•	•	•	•
•	•	•	•
•	•	•	•
•	•	•	•





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- ## Getting Started
- What's the next cultivation step?
  - Who's going to do it?
  - By when?
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- ## Five Basic Principles
- Facetime is KING
  - Redundancy
  - Prospects selected based on giving capacity
  - Three-year cultivation plans
  - Relationship is recorded in the files
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- ## Five Types of Easy Cultivation
- Annual Renewal Solicitation and Acknowledgement
  - Introductions to other org leaders
  - Invitations to YOUR events
  - "Chance" meetings at their events
  - Share news and stories
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- ## A Word About Donor Files
- You need them
  - Include essential contact info
  - Copies of everything that comes from THEM – including email and checks
  - Strategy and cultivation planning
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- ## Getting Started
- Make your own gift
  - Pair up with a member of the Development Committee
  - Screen your entire donor list
  - Select five prospects to start and eventually settle on just three
  - Research each one
  - Call each one – get to know them
  - Draft a Status Paragraph about each one
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## Screening

- List of all current donors
- Circle each one you know & have access to
- Star each one who is capable of making a \$10,000 giving decision



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## Metrics

Land Trust Dashboard - Sept 10, 2013 Board meeting

		Target	Current 8/28/13	Previous 7/9/13	Status	Notes
Fundraising	T-100 Contacts	300	65	59	R	24 projects @ 10 contacts per year.
	New donors	200	70	63	Y	Additional gift 200 of value prior to Board for future projects and more in 2013. Goal of increasing fund-raising revenue 100% - 200 year ending 10 years from fundraising goals are being met for the year 2013.
	Progress to budget goals	\$234,050 100%	\$107,262 46%	\$88,473 38%	Y	Good results from the July board action. Fundraising exceeding the year to date 2013. On track budget goal and within budget. Working on the future and need to continue to work. Working major donor secure next week up 2013 effort.
Active Land Protection Programs	Outreach and project development phase		20	21	Y	
	Board approved due diligence phase		6	5	Y	
	Active with Board approval to close		2	2	Y	
	Monitoring visits completed	40	26	23	G	Good results and always address to work on these goals for the protection and land conservation. Please email call if you are interested in joining.

## Services

### Assessment, Planning, Training, Coaching

*You can raise more money for your organization  
– I can help.*

[fundraisinghelp@sbcglobal.net](mailto:fundraisinghelp@sbcglobal.net)  
608/239-5006



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