Transforming Your Major Gifts Strategy
Moderated by:

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FUNDRAISE

YOU’VE GOT A CAUSE. LEARN HOW TO FUND IT.
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Meet Your Presenter

Adrianna O’Donnell, MBA, CFRE
Director of Philanthropy
San Ysidro Health
POLL: Tell us about yourself!
How many years of fundraising experience do you have?
Objectives

- What is a Major Gift?
- Learn how to determine the appropriate Major Gift size for your organization
- Explore the Traditional Major Gifts Process
- Practice planning for a Major Gift solicitation
7 PRINCIPLES OF MAJOR GIFT FUNDRAISING INCLUDING PLANNED GIFTS

1. Major donors don’t give to satisfy an organization’s (or a beneficiary’s) needs. They give to satisfy **their own needs**.

2. Major donors are **looking for a partner** to help them satisfy their needs. One they can trust.

3. Major donors yearn for an organization that will **give them an opportunity** to help change the world and make an impact.

4. Major donors want to **give through an organization**, not to an organization.

5. Major donors want the organization and its staff to **facilitate the process** by making it easy, convenient, pleasurable and valuable (so it enhances their lives).

6. Major donors want to **be heard and involved**, not ignored and treated like an ATM machine.

7. Major donors want to be **engaged in a partnership**, not a solicitation.

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What is a Major Gift?

The term “major gift” means something different at every organization.

They are the largest donations your organization receives in a year, excluding planned gifts.

Usually, nonprofits have a range.
How do you determine that?

- Pull the 5-10 donors who have given the largest gifts to your organization.
- Eliminate outliers (use the median, not the average).
- Set a minimum.
- Test your minimum within your database.
COMMUNITY SHARE

How does your organization define a “Major Gift Donor”?

How does your organization find, engage, and steward Major Gift Donors?
The Traditional 4 Steps of Major Gifts

1. Identification
2. Cultivation
3. Solicitation
4. Stewardship

Major Gift Fundraising Cycle
Cause Selling

Phase 1
• Prospecting
• Pre-Approach

Phase 2
• Approach
• Need Discovery
• Presentation
• Objections

Phase 3
• The Ask
• Stewardship

Major Gifts Process

Identification
• Prospecting
• Pre-Approach

Cultivation
• Approach
• Need Discovery

Solicitation
• Presentation
• Objections
• The Ask

Stewardship
3 Stages of Preparation

1. What is the ask?
   - Include things like gift amount, purpose, benefits, etc.

2. How will this gift make a difference and how will success be measured?

3. What objections might you encounter?
Using a Gift Chart

A gift chart is a tool used to determine how many gifts and prospects you will need to raise a specific amount of money.
Plan Stewardship

Who will follow up?

When will they follow up?

How (specifically) will they follow up?
COMMUNITY SHARE

How does your organization develop their Major Gift Strategy?

What are your biggest obstacles?
SUMMARY

• Determine what a major gift is for your organization.

• Use the Cause Selling Cycle and the Major Gifts Process together.

• Careful planning leads to stronger major gifts asks and results.
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QUESTIONS?

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Connect with Adrianna!

https://www.linkedin.com/in/adriannaodonnell
THANK YOU

TAKE YOUR CAUSE AND
CREATE IMPACT.