

fundraising academy

CAUSE SELLING EDUCATION



Wednesday, December 15, 2021

Transforming Your Major Gifts Strategy

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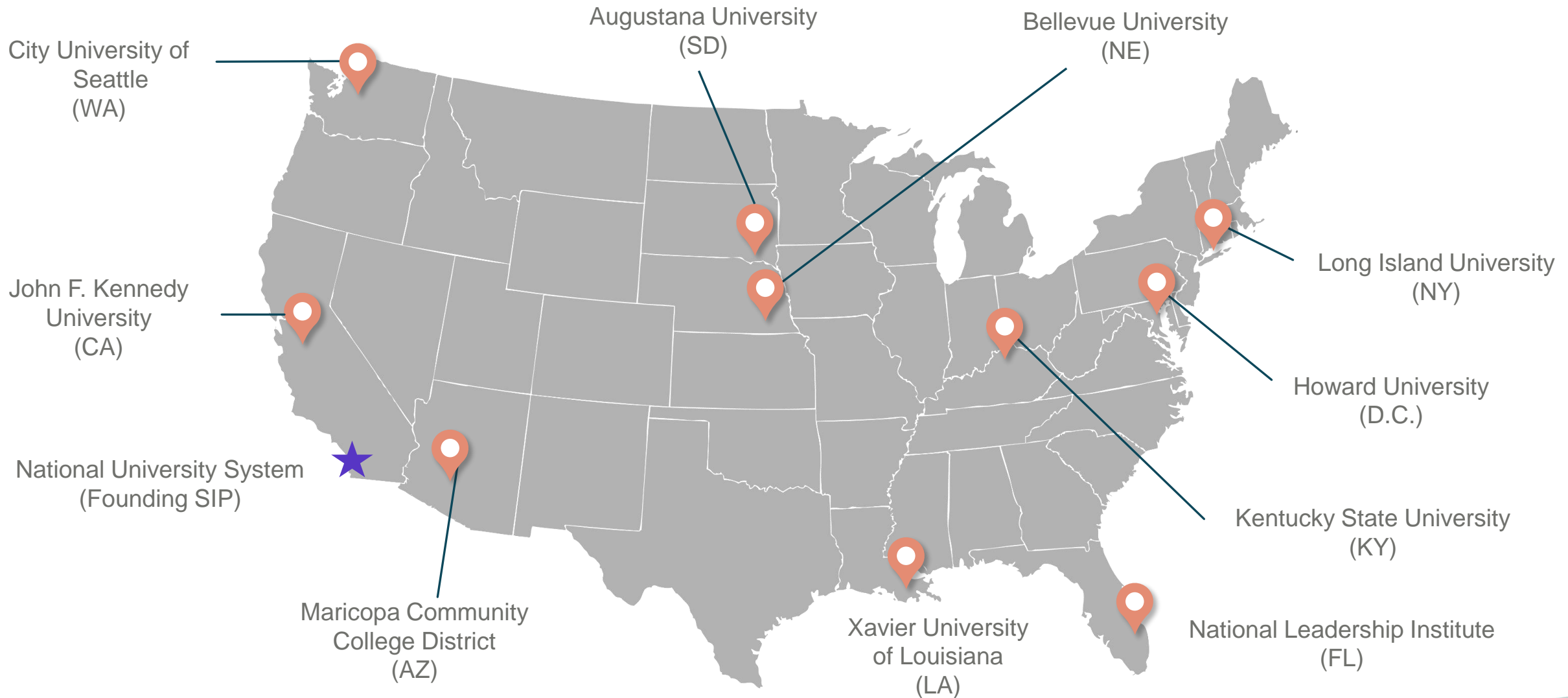


Christine Kim
Project Coordinator
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FUNDRAISE

YOU'VE GOT A CAUSE.
LEARN HOW TO FUND IT.

Our Affiliate Partners



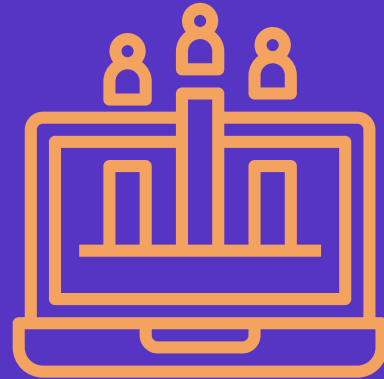


Meet Your Presenter

**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?

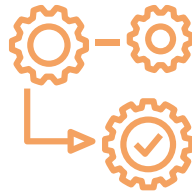
Objectives



- 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.

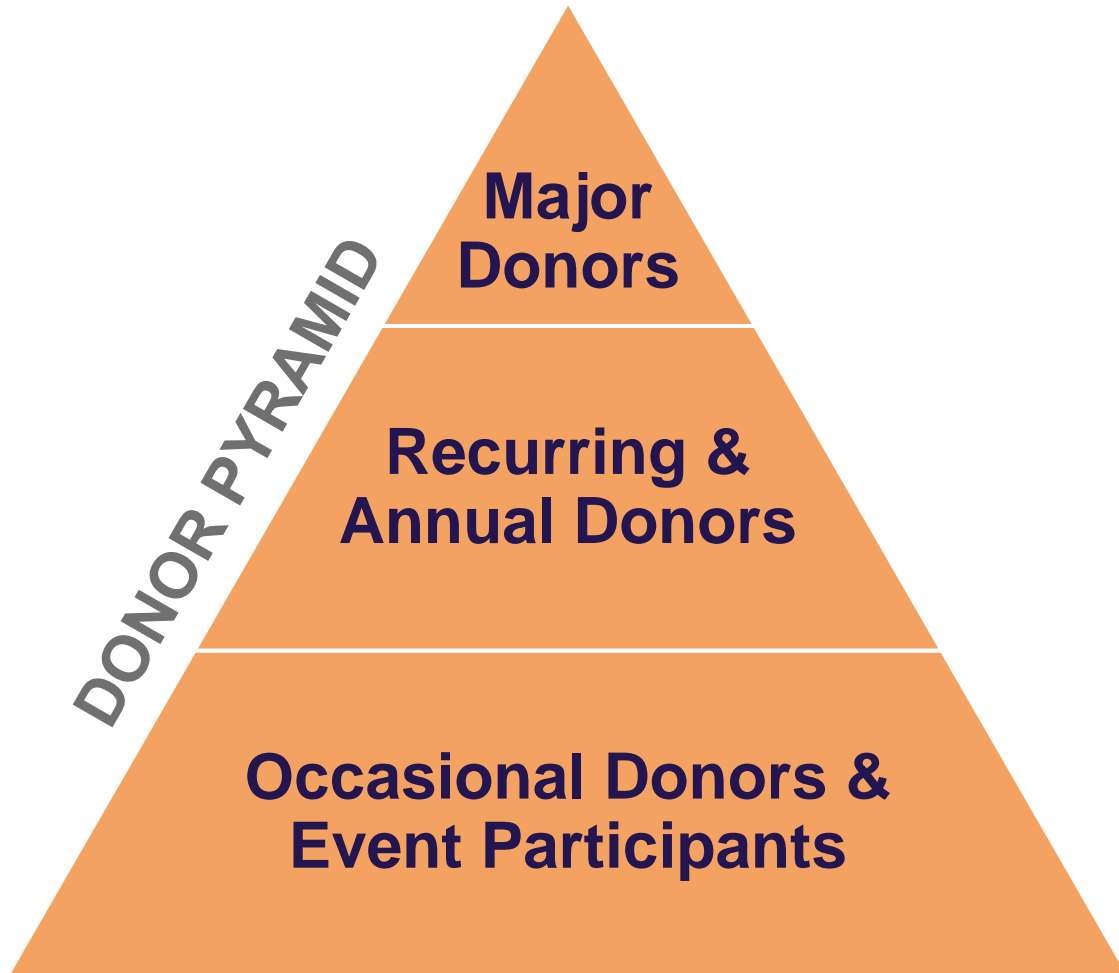
What is a Major Gift?

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.

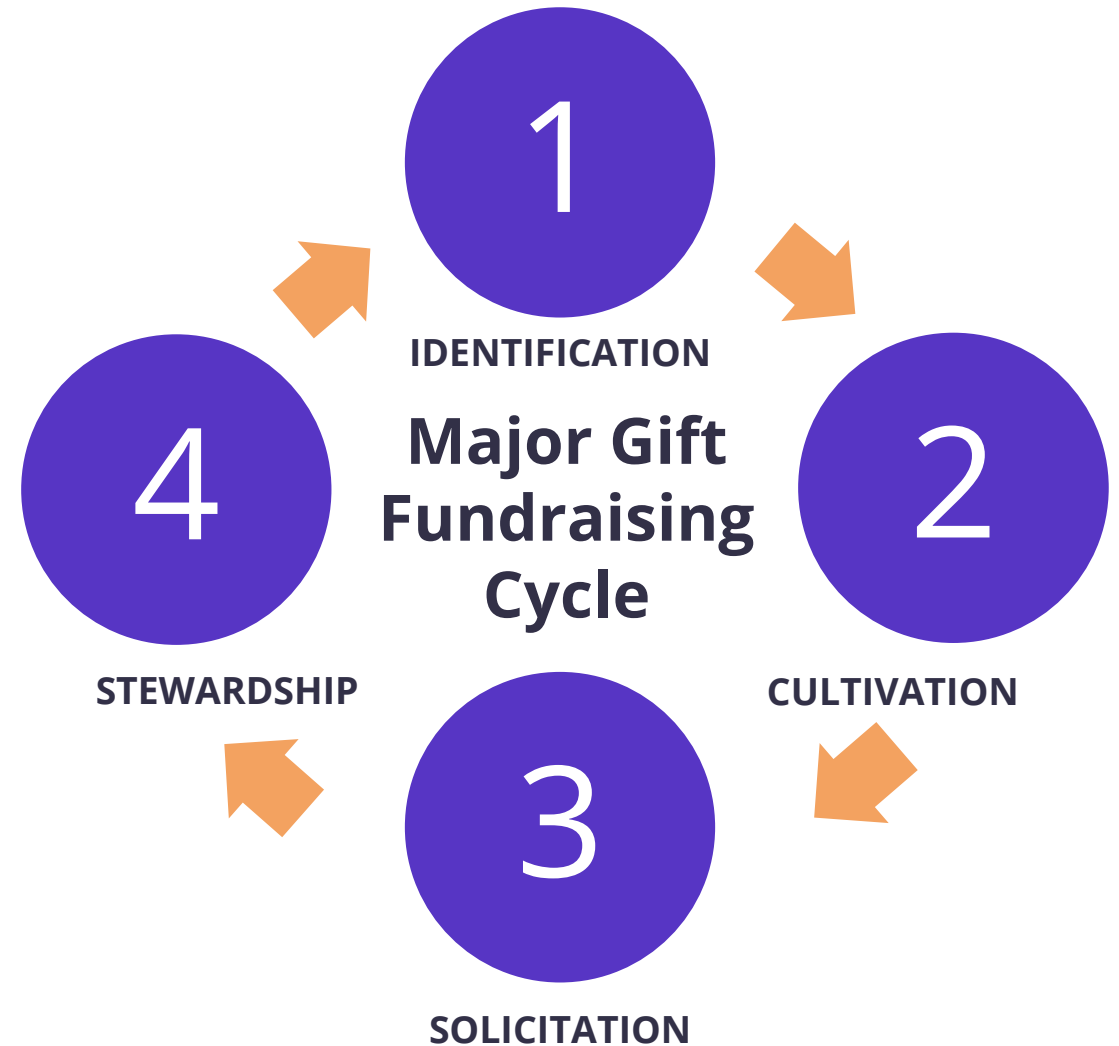
COMMUNITY SHARE



*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



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

Gift Range Chart



Gift Amount	# of Gifts	# of Prospects	Cumulative Total
\$150,000	1	4	\$150,000
\$75,000	2	8	\$300,000
\$40,000	4	16	\$460,000
\$20,000	8	24	\$620,000
\$10,000	16	32	\$780,000
\$5,000	24	48	\$900,000
\$2,500	40	80	\$1,000,000

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?

Send them through Q&A!

Connect with Adrianna!



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adriannaodonnell](https://www.linkedin.com/in/adriannaodonnell)



THANK YOU

TAKE YOUR CAUSE AND
CREATE IMPACT.

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