

# How to Build and Sustain Your Major Gifts Pipeline

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**Identify, qualify, cultivate, ask & steward  
your way to fundraising success!**

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**Philanthropy, Not Fundraising**

# Who am I?

- **30+ years in-the-trenches development staff leader** helping raise millions of dollars for such organizations as San Francisco Food Bank, Jewish Family and Children's Services, San Francisco Conservatory of Music and California School of Professional Psychology. Have asked lots of people for money!
- **8+ years nonprofit fundraising/marketing coach, consultant and principal of Clairification School**
- **AFP Fundraiser of the Year**
- **Best Nonprofit Blog** – Fundraising Success Magazine
- **Speaker:** ADRP; ALDE; American Bar Association; Association of Fundraising Professionals; DER, Foundation Center; Fundraising Summit; Leadership Summit; NAYDO; U. S. Olympics Committee... **Regular Contributor:** Bloomerang, Guidestar-Candid; Network for Good, Nonprofit Pro

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Philanthropy, Not Fundraising

# POLL #1: What is Your Role at Your Nonprofit?





# 10 Steps to Rev Up Your Major Gift Fundraising Engine!



Put these basic steps in writing to fuel your major gift journey

## *Infrastructure*

1. Build a major gifts team.
2. Determine your major gifts amount.

## *Identification*

3. Create a prospect list – not from scratch.

## *Qualification*

4. Qualify prospects for your portfolio.

## *Cultivation*

5. Set revenue goals/create cultivation plans.

6. Build in continuous learning.

7. Have someone hold you accountable.

8. Clarify and tailor your case for support.

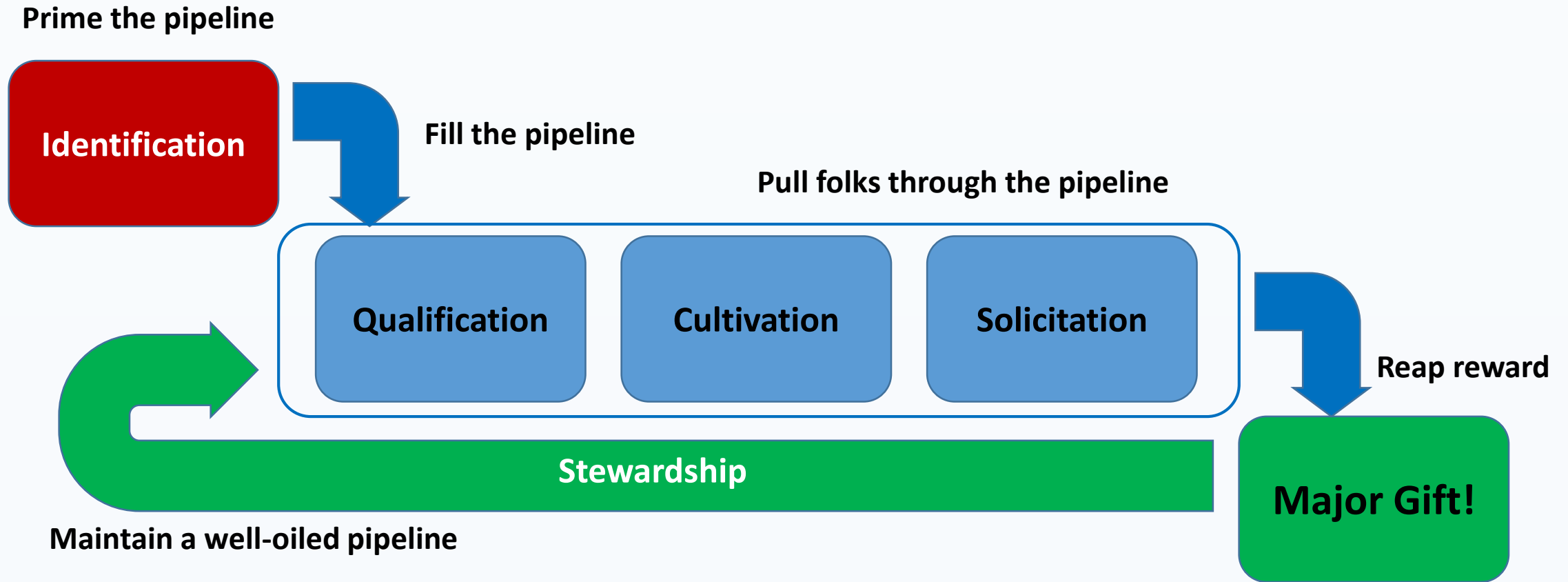
## *Solicitation*

9. Start asking. With passion.

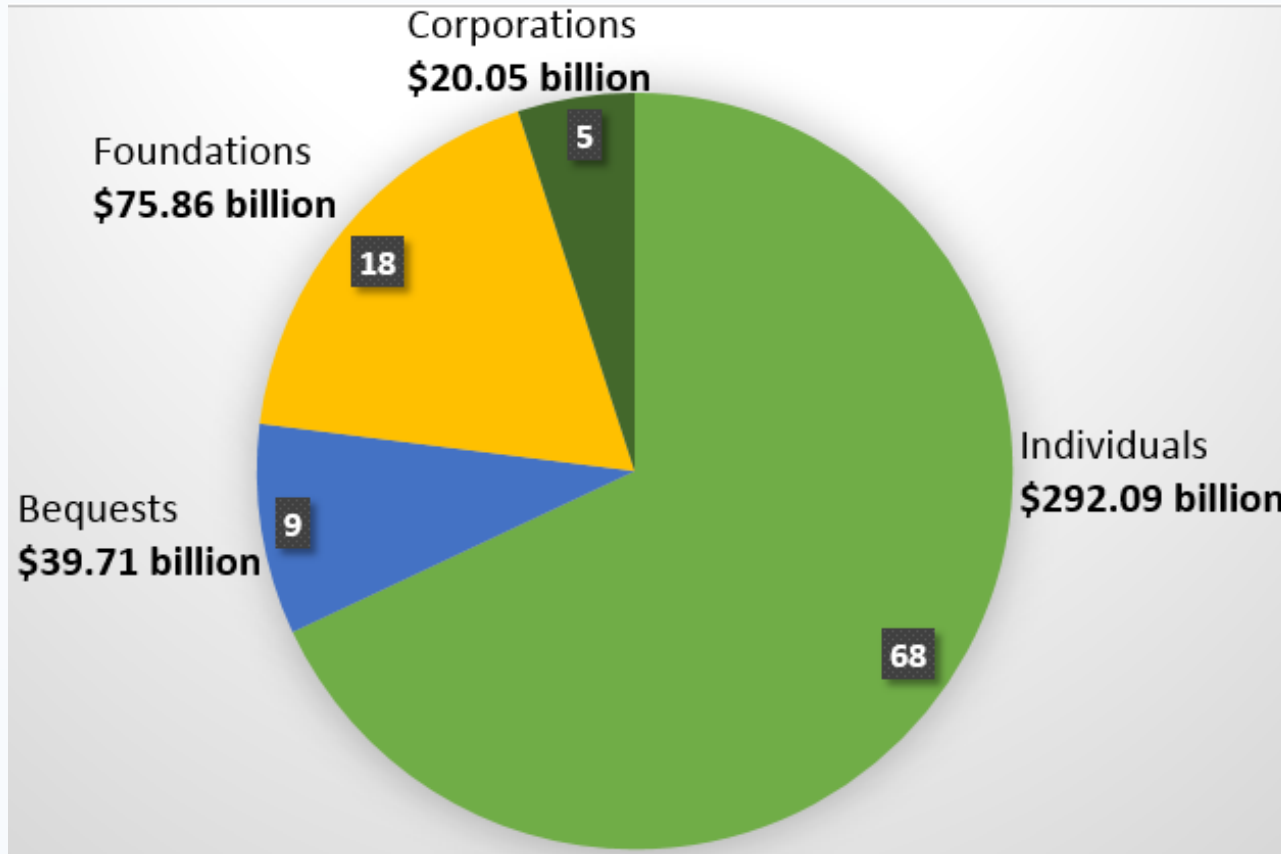
## *Appreciation and Stewardship*

10. Adopt an attitude of gratitude.

# Major Gifts Fundraising Pipeline

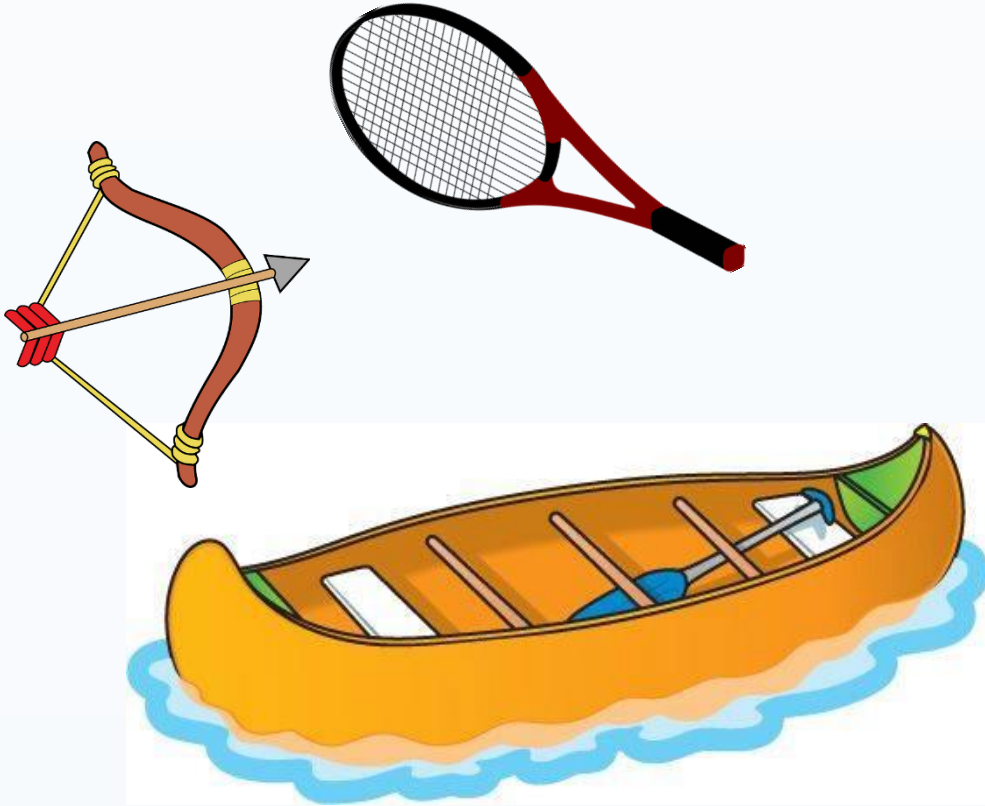


# Why you need a major gifts pipeline



- Nearly **80% of all fundraising comes from individuals.**
- Studies show over **88% of all funds raised come from just 12% of donors.**
- **76% of all household charity in the U.S. comes from the top 3% of U.S. households.**

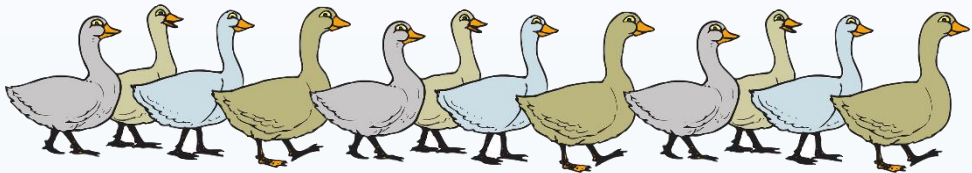
# 1 Build a Major Gifts Team



**Multiple Staff... All Board... Other  
Donors... Other Volunteers**

**CEO, development director,  
major gift officer, other  
development staff must:**

- ✓ Get in touch with own passion
- ✓ Enjoy talking with people
- ✓ Get out of the office
- ✓ Be self-motivated, optimistic  
and inspired
- ✓ Be organized
- ✓ Like to ask



**Where you lead, donors will follow**

**Program staff must:**

- ✓ Get in touch with own passion
- ✓ Give
- ✓ Act as ambassador
- ✓ Act as advocate
- ✓ Ask

**Board members and other donors  
and volunteers must:**

- ✓ Get in touch with own passion
- ✓ Enact own passion through  
philanthropy
- ✓ Invite others to share passion by acting  
as ambassador, advocate and/or asker



## 2 Determine Your Major Gift Amount: Quick and Dirty

Break your database down (look at the past 24 months) into 3 segments:

1. Those who gave you 0% of your budget – **STOP** putting energy here!
2. Those who gave you 10% of your budget – Develop a communications plan, and **STICK TO IT.**
3. Those who gave you 90% of your budget – **FOCUS** the lion's share of your time and budget here.



# Pick Your Major Donor Amount:

## Use Your Math

**Step 1:** Review your donor records to identify the top 10% of your annual *individual* donors over past 24 months.

- What is your **mean** (average) major gift?
- What is your **median** major gift?

Ann Apple	\$25,000
Bob Berry	\$ 2,500
Chuck Cherry	\$ 2,500
Dilbert Dill	\$ 2,000
Ed Elderberry	\$ 2,000
Fred Fig	\$ 1,500
Gina Guava	\$ 1,000
Huck LeBerry	\$ 1,000
Ina Ice Plant	\$ 1,000
Jo Jackfruit	\$ 1,000

**mean:**  
\$3,950

**trim mean:**  
\$1,611  
**median**

### 3 Create a Prospect List – Not from Scratch



**Major Gift Fundraising is  
NOT “Lifestyles of the  
Rich and Famous”**

**Do any of these statements sound familiar?**

***What about [richest person in the community;  
name on everyone’s list]?***

*He has lots of money. He should give here!*

***What about getting a celebrity to be our  
spokesperson?***

*That will probably persuade others to give.*

*Does anyone know anybody?*

***What about the parents in your kid’s private  
school?***

*That’s probably a good list.*

# 3 Major Donor Portfolio List-Building Essentials



It's not just about the money

- **LINKAGE** to your cause (e.g., they've given before; they've been a client or patron; they know one of your board members, etc.);
- **INTEREST** in your cause (just because a family member was treated at your hospital does not mean the prospect wants to build you a new wing; linkage alone, without interest, does not suffice), and
- **ABILITY** to give (yes, though we hate to talk about money, it is important that the prospect have the capacity to make a major gift if you're going to put them on a major donor cultivation track; if not, you're just wasting your time).



# Begin by Looking in Your Own Database... There's no place like home

Sort from  
highest to  
lowest

- Amount
- Recency
- Frequency
- Current affiliation
- Past engagement
- Capacity

Above average single gift

Above average  
cumulative givers

Service User

Volunteer

\$100+ first gift

Upgrading  
givers

Consecutive givers



## 4 Qualify Prospects for Your Portfolio



**Don't Knight. Invite!**

- **Will this prospect be responsive?**
  - Don't overlook this step!
- **Do they *want* a deeper relationship with you?**
  - Only 30% will be receptive to your "touches" and "moves."
- **How can you find out?**
  - Make planned preliminary "touches." Persevere.

# Steps to Qualification

**1. Send a letter or email introducing yourself to your prospect.**

➤ **Thank**

➤ **Tell them they're important**

**2. Make a follow-up phone call.**

➤ **If you get them, endeavor to learn more about their passions.**

➤ **If you miss them, leave a warm friendly message with contact info.**

**3. Try again a week later.**

**4. Try again a week later.**

# Steps to Qualification

5. If you get no response to your call or letter, send a survey.
6. If you get no response to the survey, send a handwritten note card.
7. Send an invite to an upcoming event, tour or volunteer activity.
  - Follow up with a call or email to let them know the invitation has been sent.
  - Ask them to RSVP to you directly.
8. For top prospects who've eluded you, try a final phone call, email or text.

5

# Set Revenue Goals and Create Cultivation Plans

## Tier Your Qualified Portfolio

Top Major Gifts

MG Upgrades +  
Renewals

Annual Giving



- **A = 10-15% of caseload**
  - 50% of time
- **B = 40-50% of caseload**
  - 30% of time
- **C = 50 – 65% of caseload**
  - 20% of time
- **D = Regular annual giving campaign**

ep caseloads manageable

# Move Prospects, as Appropriate, to Your Legacy Giving Track



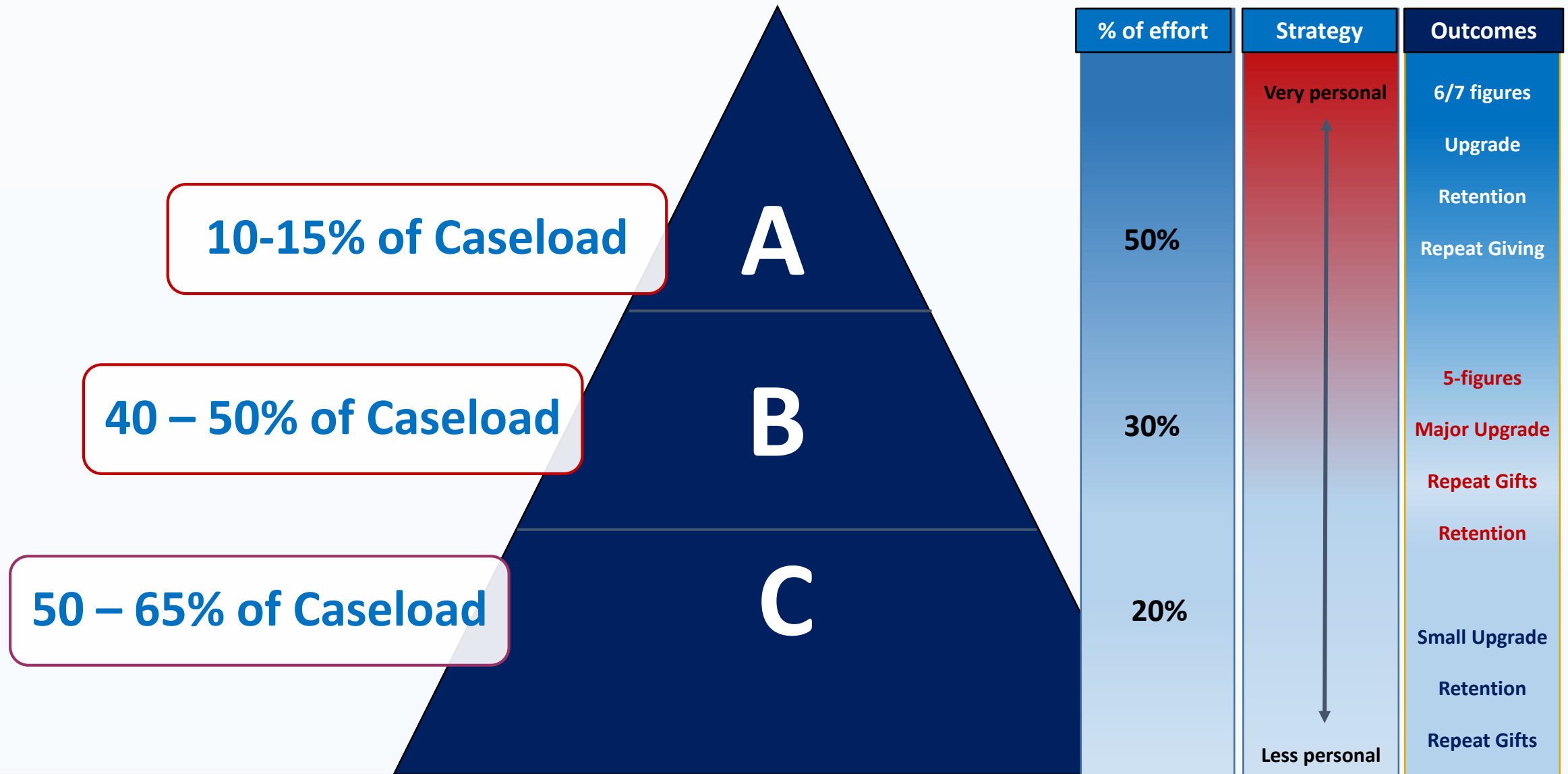
Can't give  
the cupcake  
now?

Maybe they  
can give the  
whole cake  
later!



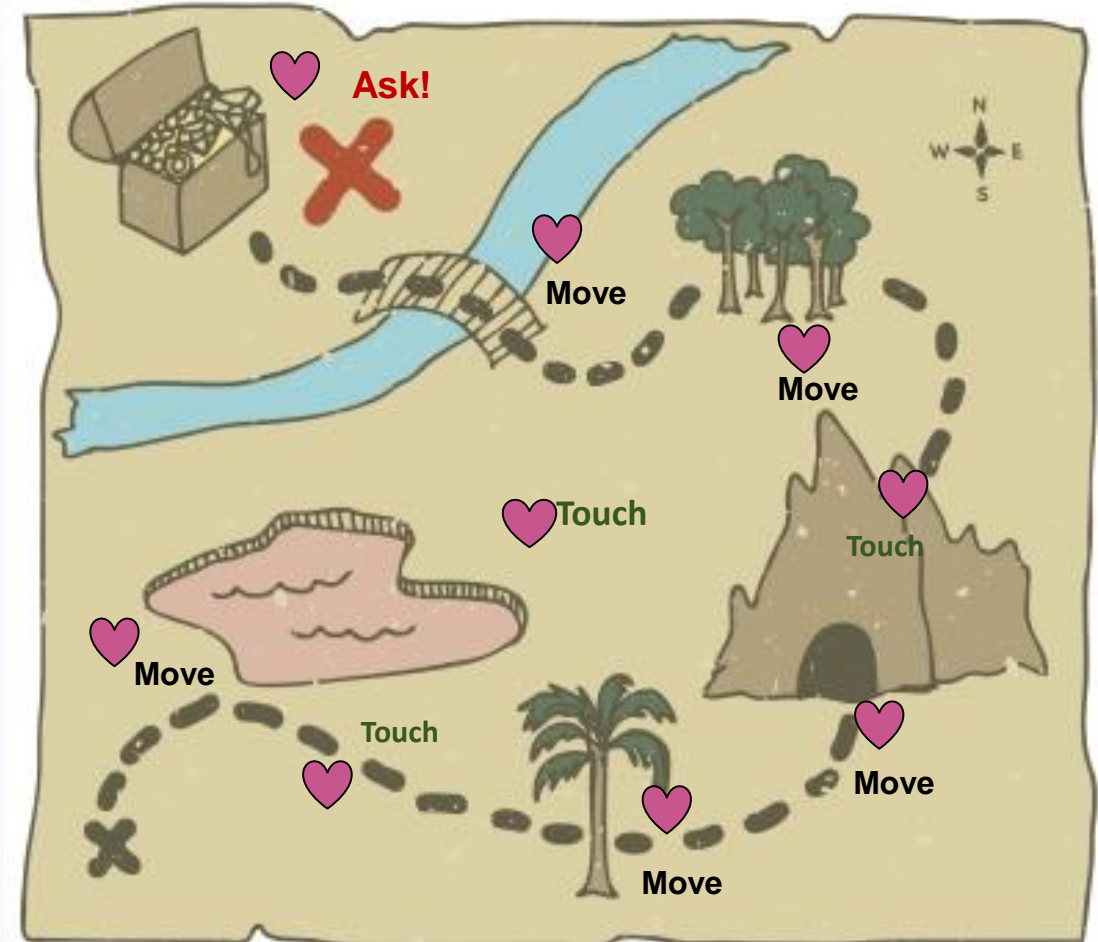


# Keep Your Caseload Manageable



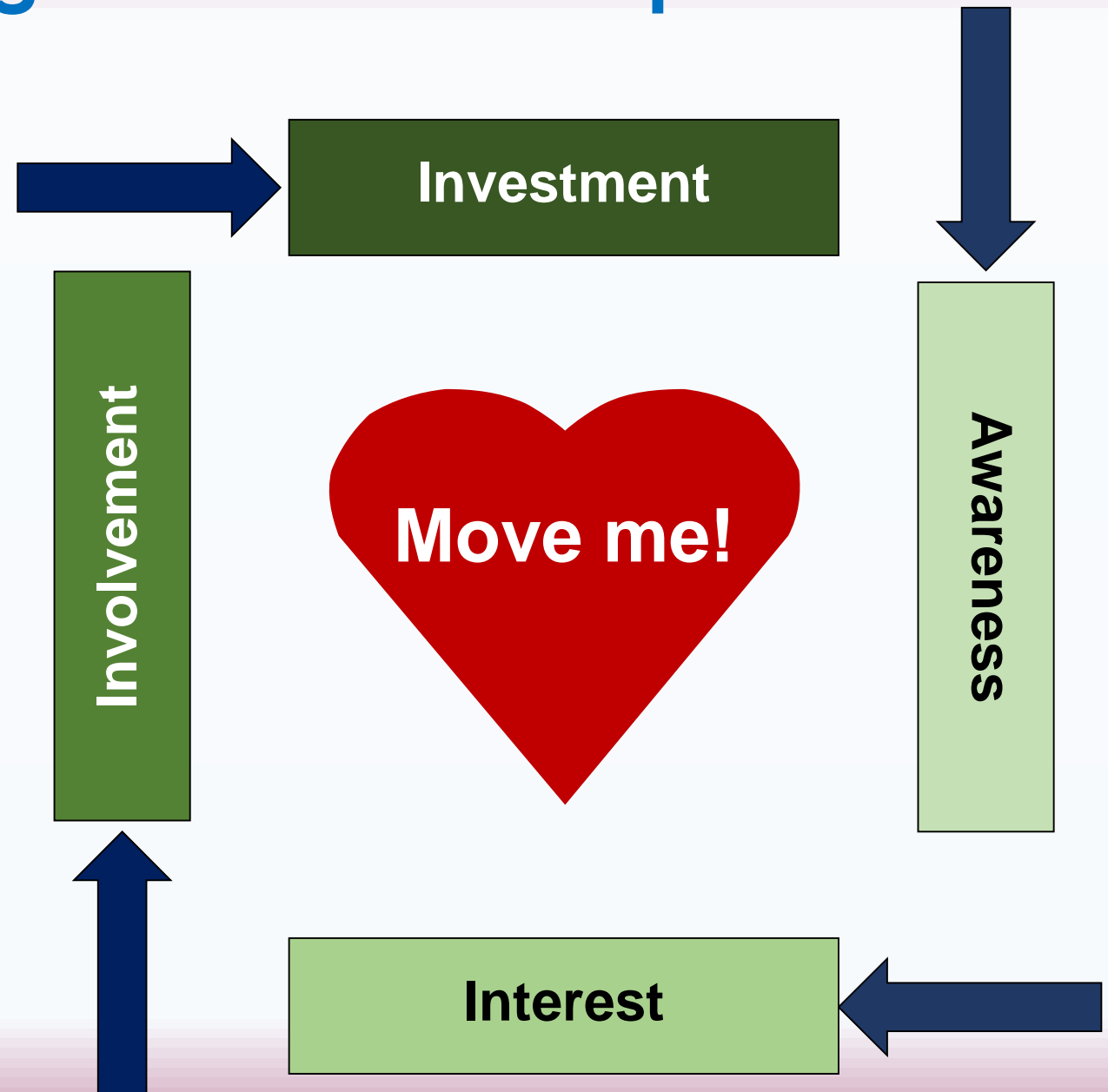
# Develop Individualized Cultivation Plans with 'touches' and 'moves' along the way

- Take your qualified major donor prospects...
- Build a map to guide you towards the treasure...
- Infuse love💖into the process...



# Pull Prospects through Parts of the Pipeline

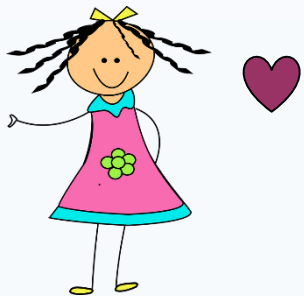
- Moves management is, very simply, **the process of building relationships** with your supporters.
- It's about **warming up and moving** your prospective donor-investor to a point where they're ready to take the next step.



# Use a Mix of Engagement Strategies

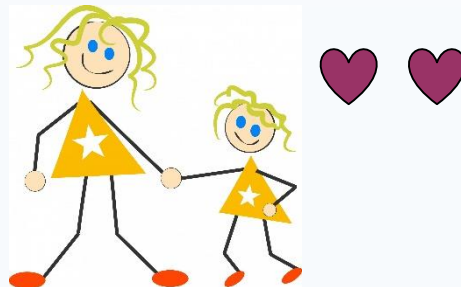
## Low Touch

- Thank you note
- Greeting card
- Invitation to event
- Informational update w/stories
- Invitation to volunteer



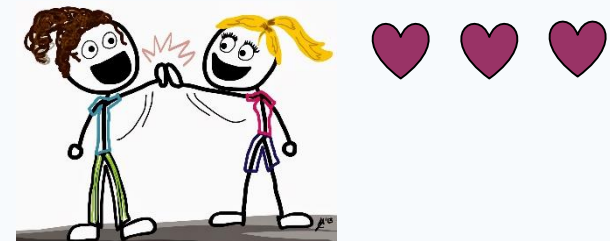
## Medium Touch

- Thank you call from E.D.
- House party
- Group tour by program staffer
- Hands-on volunteer activity
- Coffee with development staff



## High Touch

- Personal tour w/E.D.
- Intimate dinner w/ board president
- Coffee w/board member
- Invitation to serve on a committee
- Honors; recognition



# Brainstorm Your List of Touch/Move Opportunities

1. Develop a written plan for each prospect.
2. Assign a 'moves manager' to keep process on track.





When	Type of Move	Who Makes the Move
January	V.I.P. thank you phone call	Board president or board member
February	Invite to house party	Development director
March	Coffee w/ E.D. or pres.	E.D. or president
April	Invite to gala	Development director
May	Greet personally at gala	Board president, E.D., development staff or volunteer
June	Ask to come on tour, volunteer or join committee	Development director and/or committee chair
July	Send FY year-end report w/ personal note	Development director
August	Schedule advice visit, if necessary, before ask	E.D.
September	Schedule ask visit	Development director or assigned board asker
October	Invite to presentation or small event	Development director
November	Hold ask meeting	Board member
December	Thank you call + note w/ holiday greetings	E.D.

# 6 BUILD CONTINUOUS LEARNING INTO CULTIVATION



How is this bringing me closer to asking for a gift?

What did I learn that will help me secure a gift?



Did I find out what motivates my prospect to be philanthropic?

Did I find out what they love most?

What does it make sense to do next?



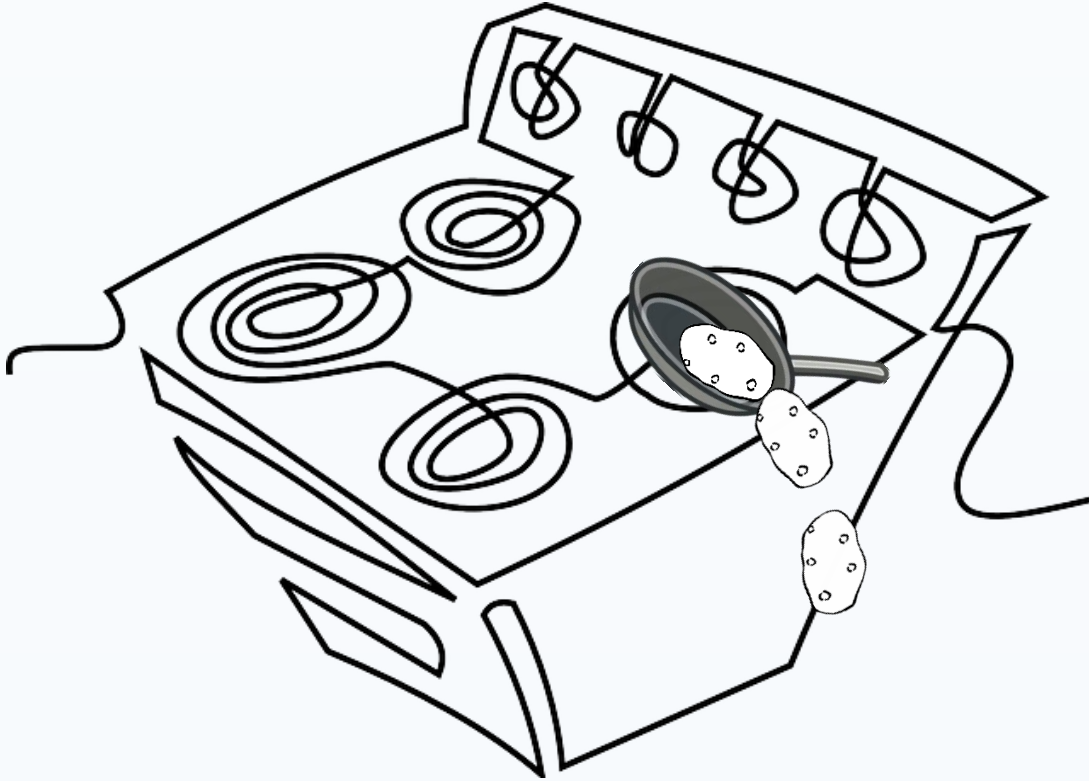
## 7 Have Someone Hold You Accountable



*The best plan is only good intentions unless it degenerates into work.*

-- Peter Drucker, best-selling management author

# Don't Allow Moves to Fall to Back Burner



## Best practices for f.t. MGO

- 2-3 visits before an ask
- 2 – 3 face-to-face solicitations/month
- 12 – 15 face-to-face visits/month
- 50 – 70% close ratio

# 8 Clarify and Tailor Your Case for Support



1. Specific need in the community

2. How you specifically address it

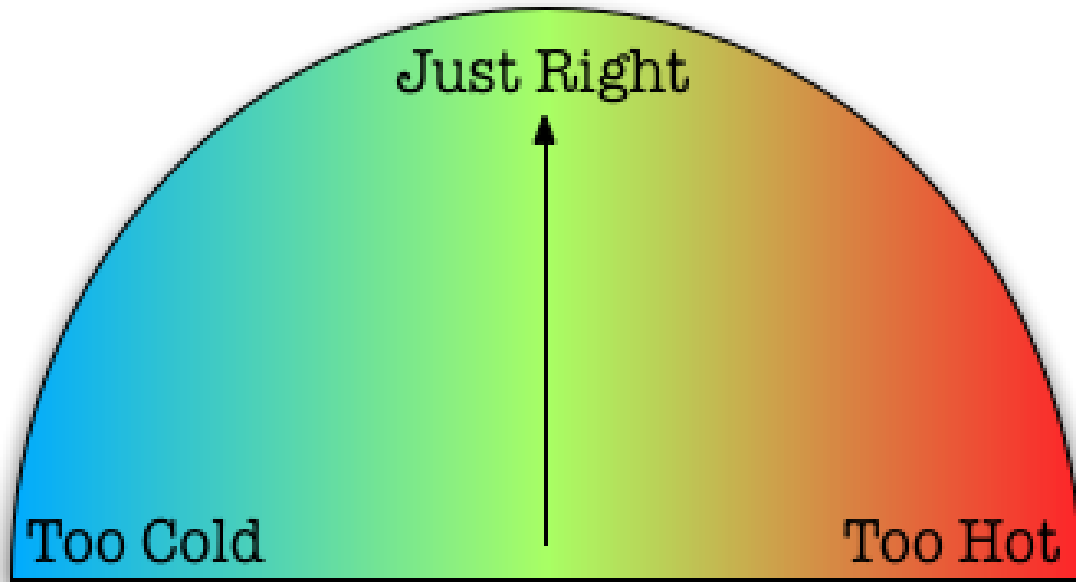
3. How donor can specifically help

**Tell stories so donors can be heroes who give happy endings**

**Major gifts are impact gifts**



## 9 Start Asking



Porridge Temperature Monitor

- Goldilocks Rule: **Not too much; not too little. Avoid cultivation paralysis at all costs!**
- **Ask!** If you're not asking, figure out **why. Ditto with your E.D., board, volunteers and other staff**
- **Donors willing to be cultivated want to give. Get to 100**

# Passion is contagious



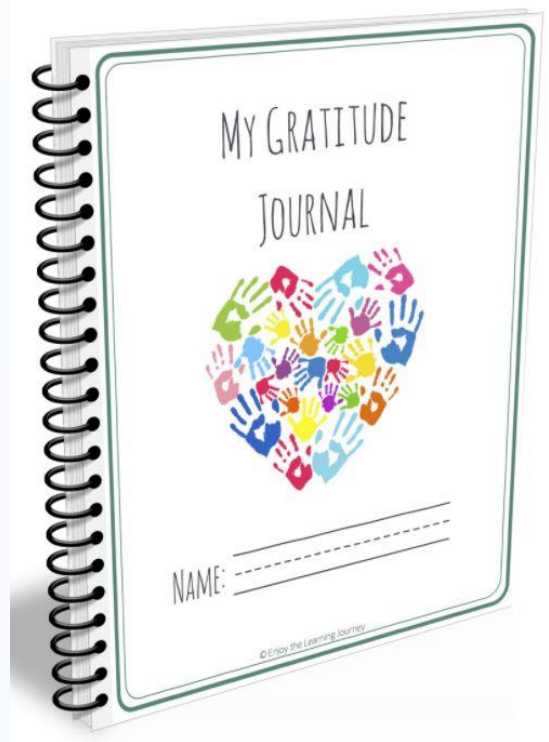
*If you're gonna preach religion, you gotta get religion!*

1. Know your values and passions
2. Be passionate and enact your values
3. Ask others to join you in your passion

# Adopt an Attitude of Gratitude

## Gratitude is NOT:

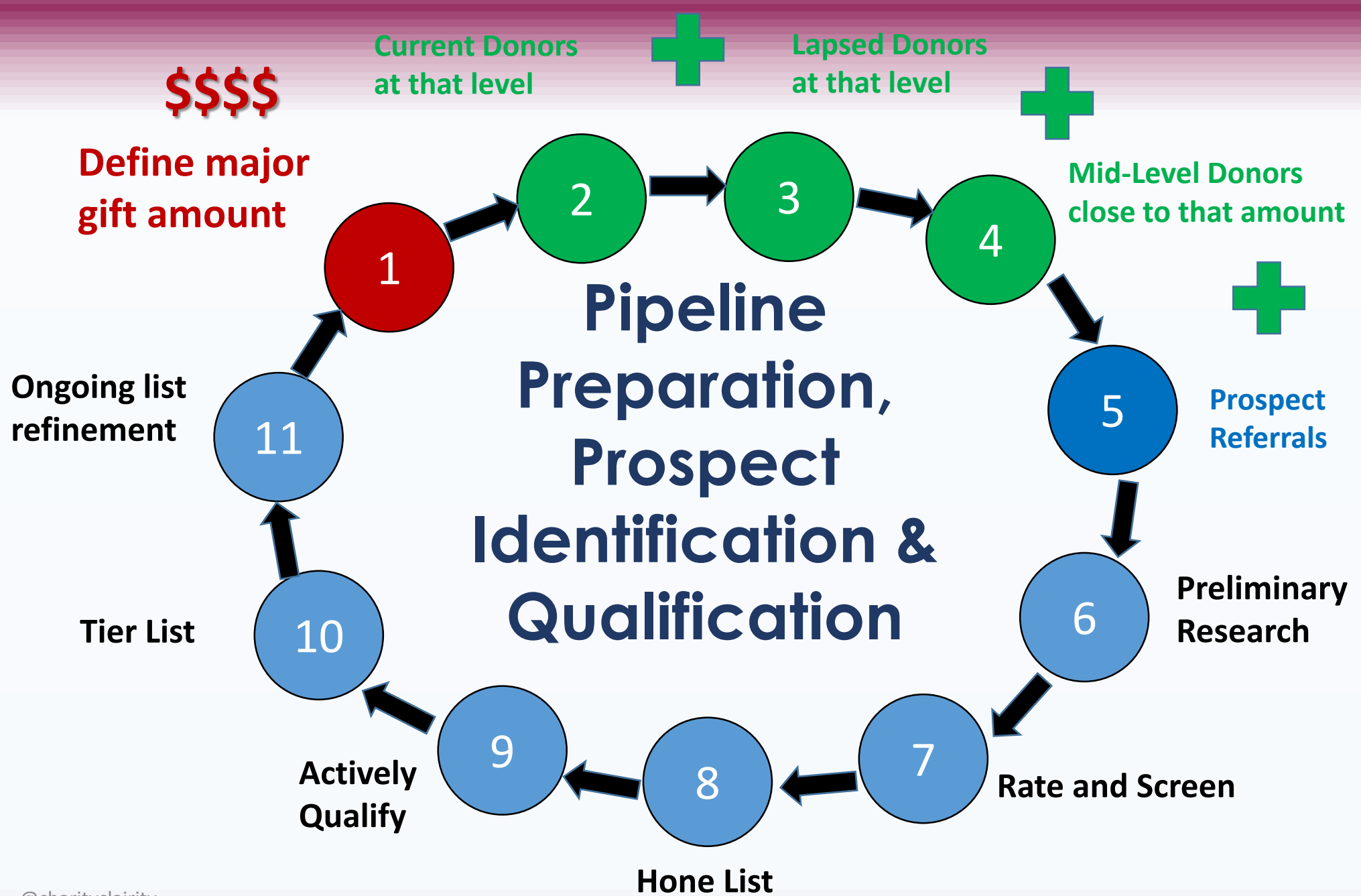
- **We** reached our \$\$ goal.
- **We're** great.
- **Our organization** did this.
- **I** made this happen.

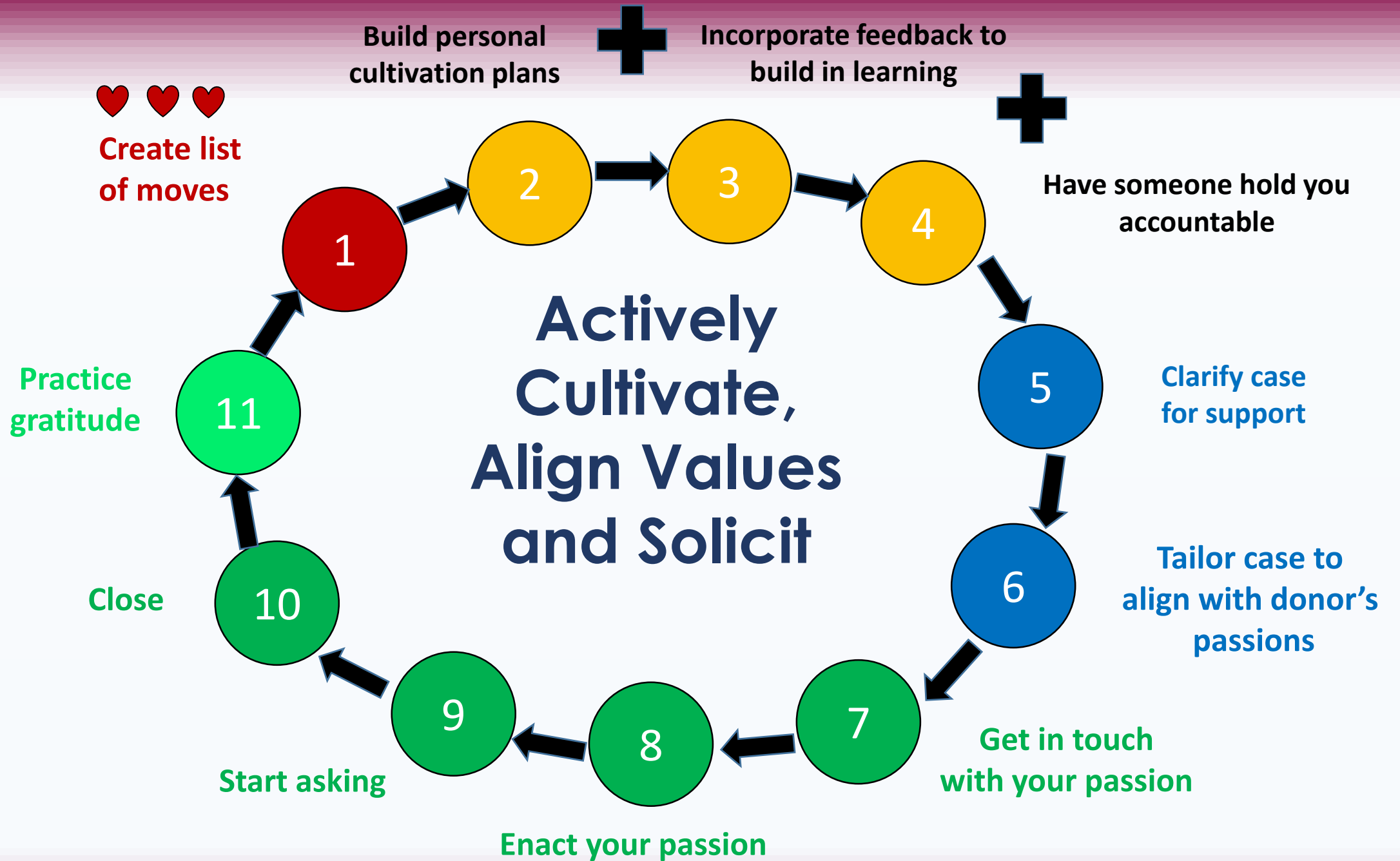


5 minutes/day yields immense benefits

1. I'm grateful to Carl for the gift in Miriam's memory...
2. I'm grateful to Elsa for telling me the story of how she survived...
3. I'm grateful to Gordon for making the Leadership gift...
4. I'm grateful to ...
5. I'm grateful to ...

**When we're grateful, we give credit to others for our success.**







# Q U E S T I O N S ? ? ?

1. Sign up for the biweekly Bloomerang-sponsored “[Clairity Click-it.](#)”
2. Enroll in ‘[Clairification School](#)’ for weekly how-to content
3. Join the “[Winning Major Gifts Strategies](#)” e-Course!

You'll get free Bonuses with each enrollment

**Philanthropy, not fundraising.  
Passionate, not forgettable.**

Enroll now in Clairification School and let Claire Axelrad be your guide on the pathway to passionate philanthropy!



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