

Are Big Foot and Major Gifts⁺ Mere Legends? Three Strategies to Set Up A Strong Individual Giving Program

Presented By: Barbara O'Reilly, CFRE

Thursday, February 16, 2023 | 12:00 – 1:00 p.m. EST

Type in the chat where you are joining us from!



Donation Forms | Event Registration
Text Fundraising | Peer-to-Peer | Auctions

A little housekeeping...

We're recording this webinar!

All registrants will receive an email containing a link to the recorded webinar AND a ton of other resources!

Feel free to ask questions!

Use the Questions chat box to ask your questions.
We will have a Q&A session at the end of the presentation.





FUNDRAISING TECH

Made for you



Designed with you in mind

Designed for fundraisers by fundraisers through customer-led development input



Time saving data tools

Save time, attract and retain donors, and raise more money with all of your fundraising data in one place



Powerful integrations

Easily integrate with your third-party CRM, email provider, and accounting software

Meet the Speaker



Barbara O'Reilly, CFRE

Barbara has thirty years of annual fund, major gifts, and campaign fundraising experience at major non-profit organizations including Harvard University, the National Trust for Historic Preservation, Oxford University in England, and the American Red Cross. Her consulting firm, Windmill Hill Consulting, helps non-profit organizations peel back the layers and develop a profitable fundraising strategy to build more effective donor relationships and catapult their revenue.

ARE BIG FOOT AND MAJOR GIFTS MERE LEGENDS?



Presented by Barbara O'Reilly, CFRE
February 2023



Windmill Hill
CONSULTING

Nice to Meet You



Windmill Hill
CONSULTING

- 30 year career as a fundraiser, earning my stripes at big shops like Harvard, American Red Cross, National Trust for Historic Preservation
- CFRE, AFP Master Trainer, Past President, AFP Washington Area Metro Chapter, Advisory Panel, Rogare, The Fundraising Think Tank
- Tailored 1:1 consulting on startups, major gifts, campaigns, assessments/studies, CEO/CDO coaching, and board training.



 BOREillyWHC

whillconsulting.com

Legend or Reality?



What We'll Learn Today...



What matters to donors and how that affects their giving



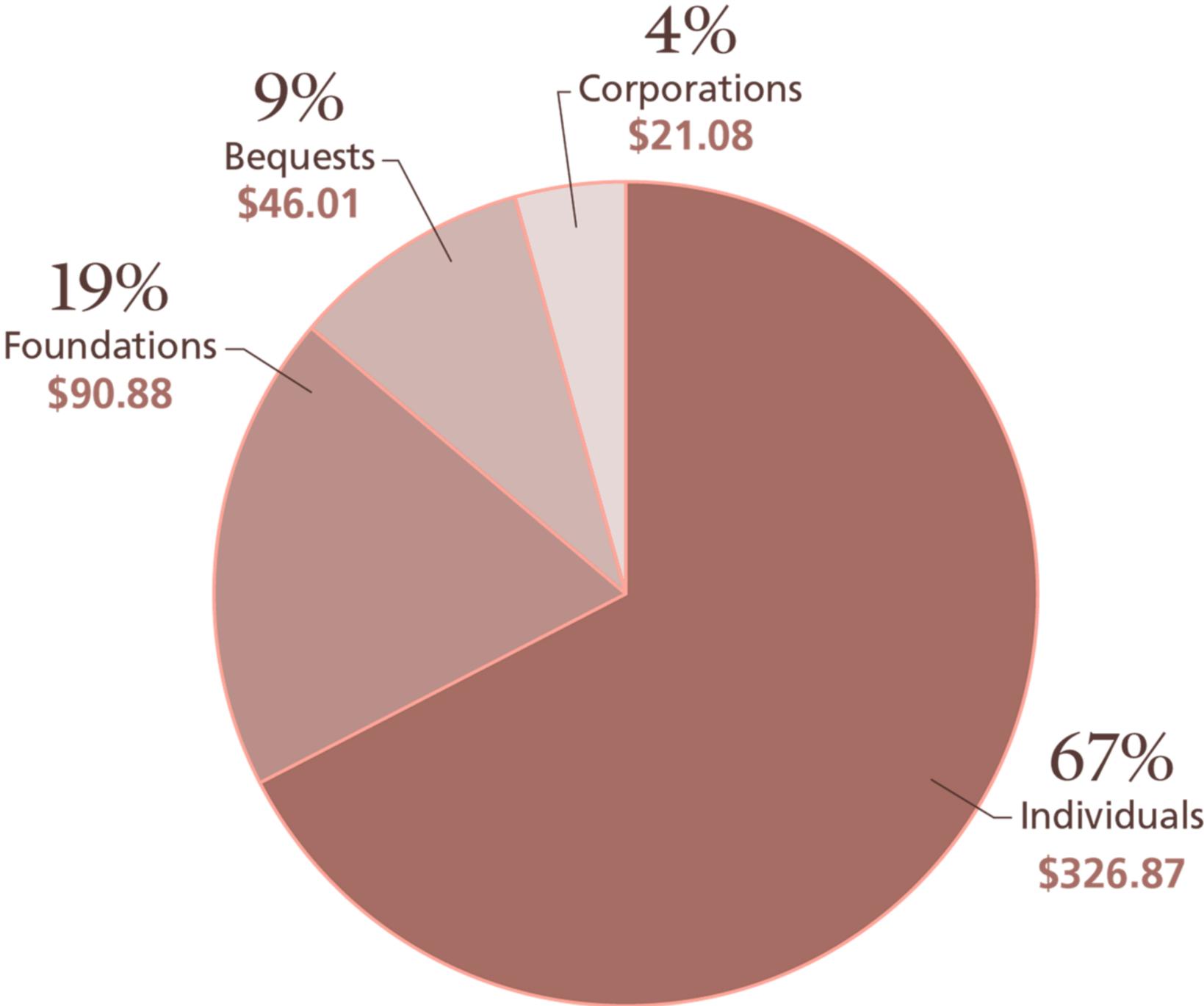
How to build an individual fundraising strategy that focuses on increasing donor retention



Ways to create engagement to inspire sustained (and increased) giving



2021 contributions: \$484.85 billion by source



Source: GivingUSA 2022 Annual Report
(in billions of dollars – all figures are rounded)

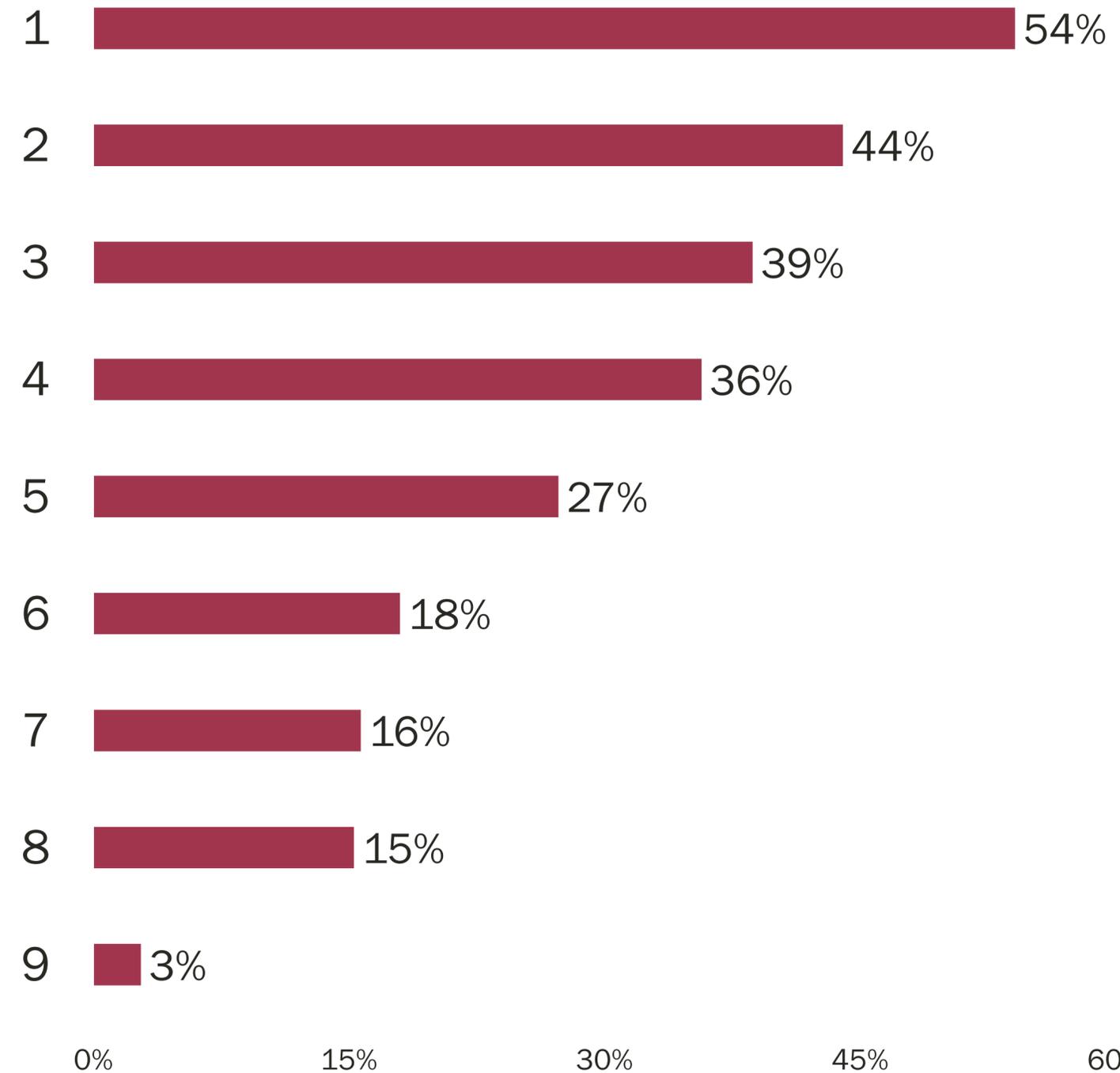
Truth #1:
Not everyone
will become
your (major)
donor



“Your generous donation,” said the Dodo, “will help us in our quest to find a cure for extinction.”

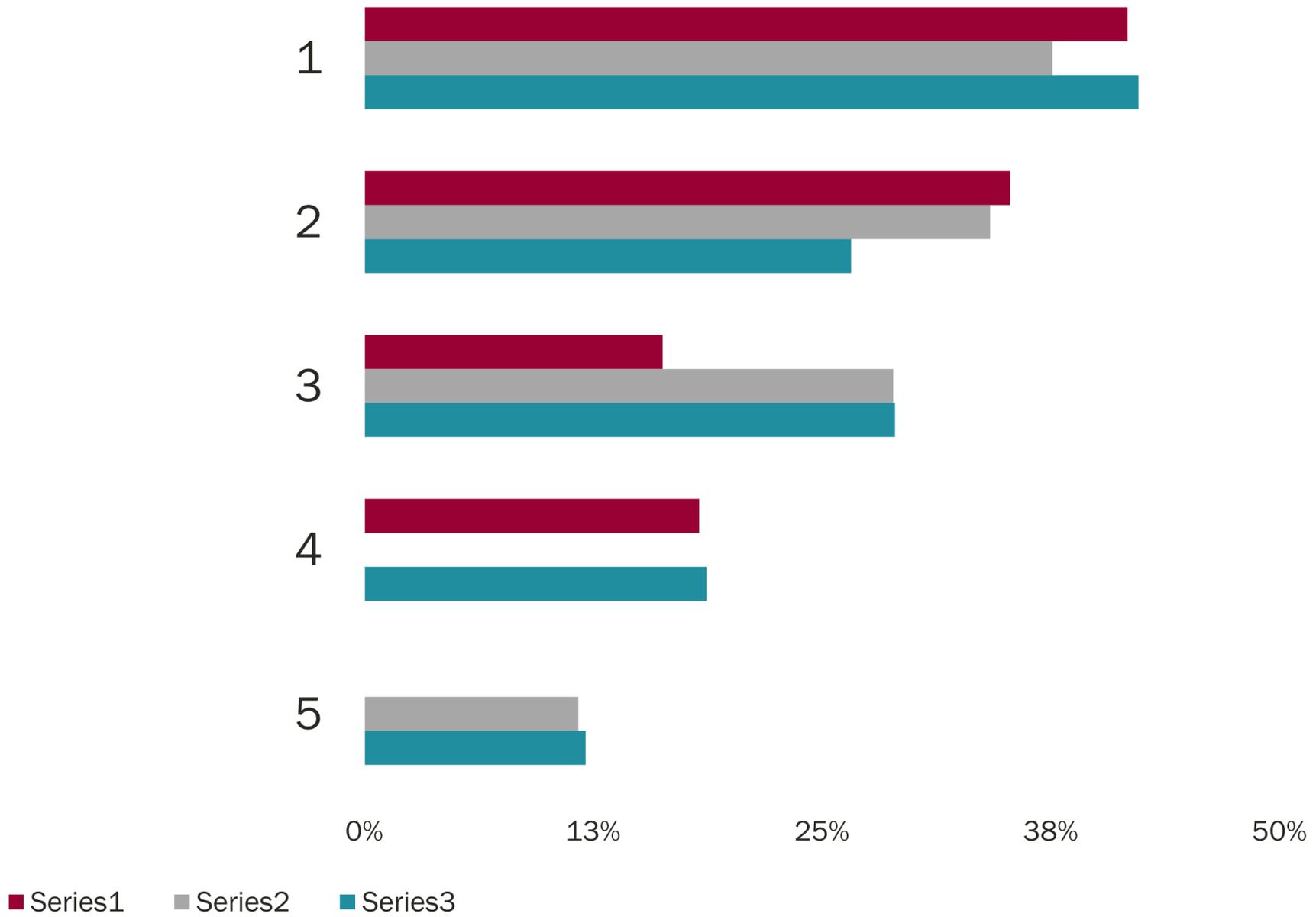
CartoonStock.com

Why Do Donors Give?

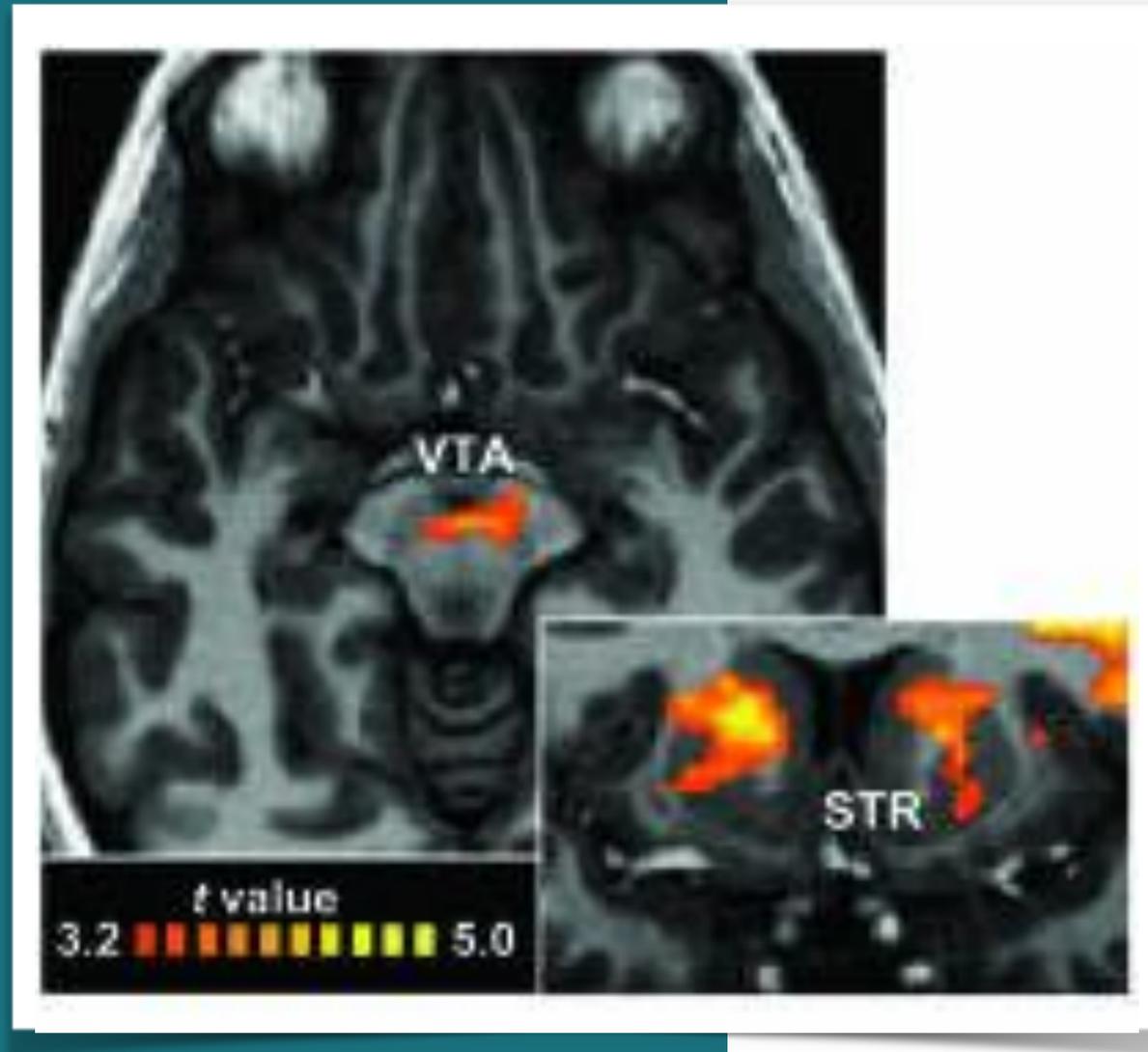


Source: 2016 U.S. Trust® Study of High Net Worth Philanthropy

Why Do Donors Stop Giving?



The Science Behind Giving



Charitable giving is rewarding (*like receiving money*)

But uniquely involves oxytocin-rich social attachment brain regions (*used in maternal and romantic love*)

Philanthropy is a “social act” using the mechanisms of FAMILY bonding—we create a “synthetic family” with other donors.

The Link Between Charity, Happiness, & Health



- People who made a philanthropic gift were 43% more likely to say they were “very happy” compared to those who did not make a gift.

- Similarly, volunteers were 42% more likely to say they felt “very happy.” While non-volunteers stated they were “not happy at all.”

- Donors were 25% more likely to say their health was “excellent” or “very good” while non-donors were twice as likely to say their health was “poor or fair.”

Who Knows You?

Volunteers

Social Media Followers

Networks of Boards

Newsletter Subscribers

Annual donors

Event Attendees



It's About *Their* Values

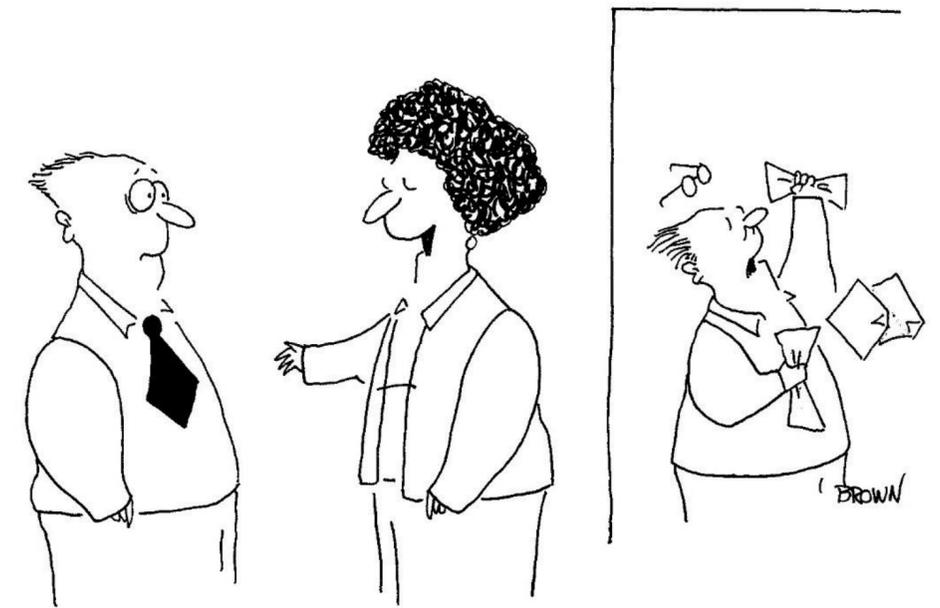


IF ONLY

SHOULD

Taboo Words

Truth #2: Retention and Upgrading Set the Stage for Growth



"He's stressing about giving one large donation or a bunch of small ones."

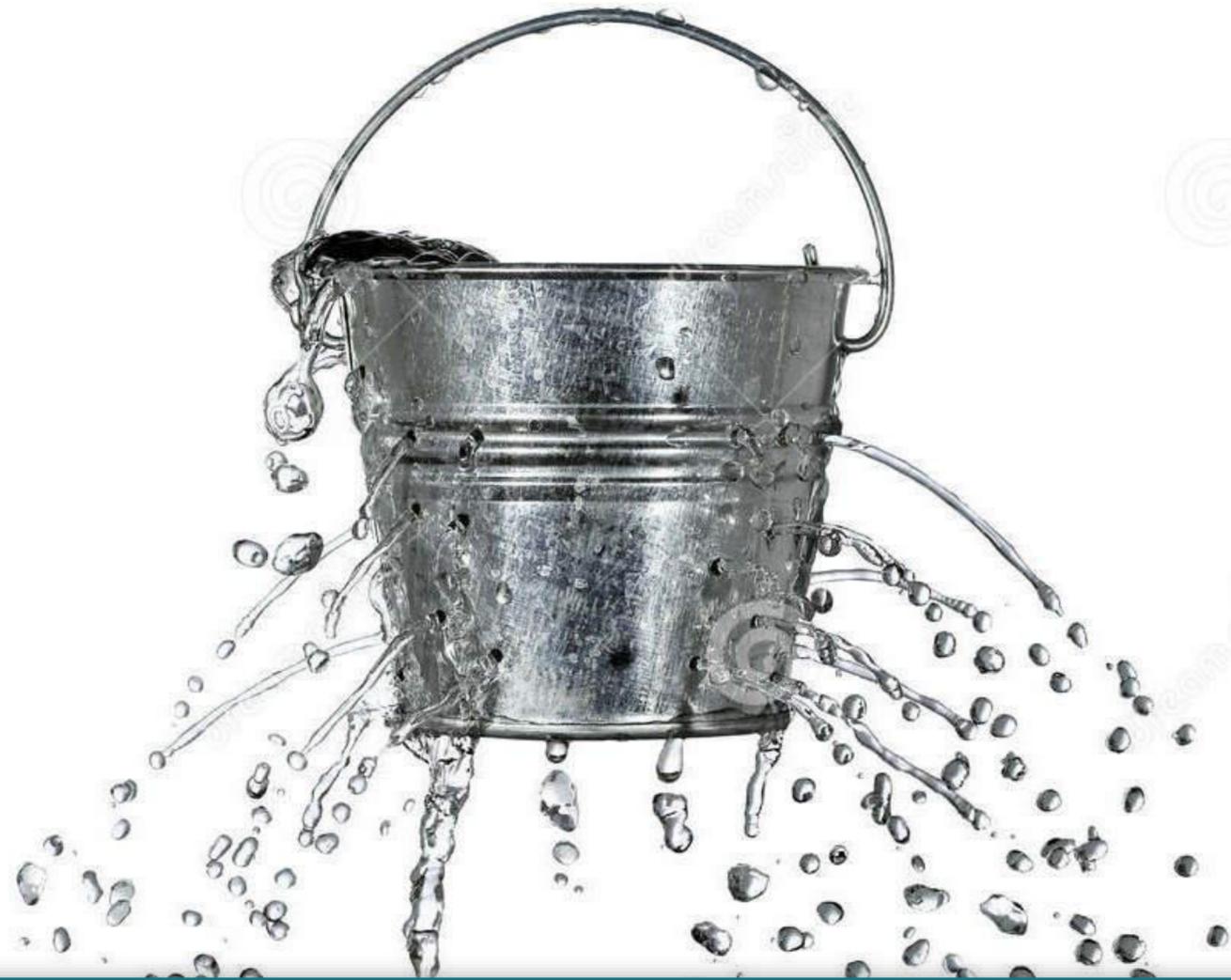


Limited
Staff
Bandwidth



Constantly Going But Not Making Progress





43%

And it's getting worse...

FIRST-TIME

23%



REPEAT

60%



MONTHLY

90%



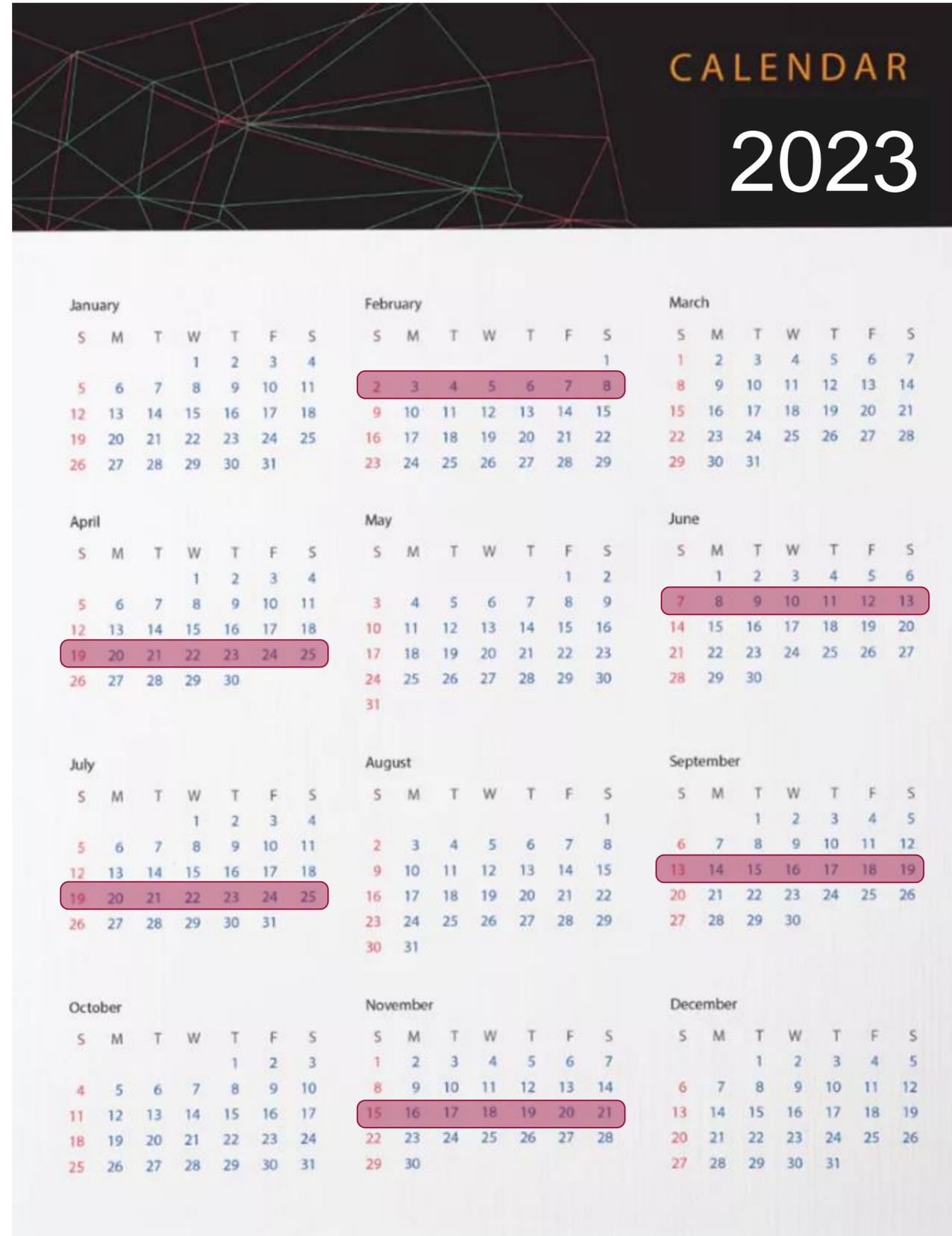
We're Always
Looking for
Our Unicorn
Donors





You Probably
Already Know Who
Your Major Donors
Are or Can Be

What's the right cadence?



At least 4 to 6 solicitations/year

AND throughout the year, create meaning for your donors through communications that show they made a difference

Personal “thank you’s” with stories of impact and results

Share video updates about your programs

In-person visits by staff/executive leadership

Invitation to events

Celebrate your donors—feature profiles in your e-newsletters

Offer periodic webinars with CEO

Research reports

Invitation to volunteer, Donor Surveys

Regular Multi-Channel Fundraising Builds Donor Engagement

Your story from the perspective of your audience's values and what's important to them.



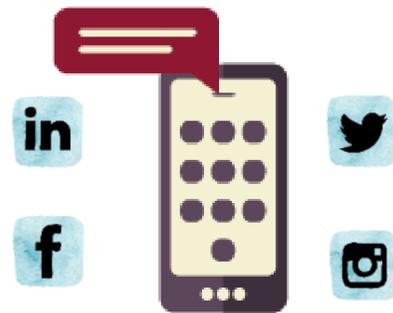
**Print—Direct
Mail
and Newsletters**



E-communications
Mobile / Online
E-newsletters,
e-appeals, videos

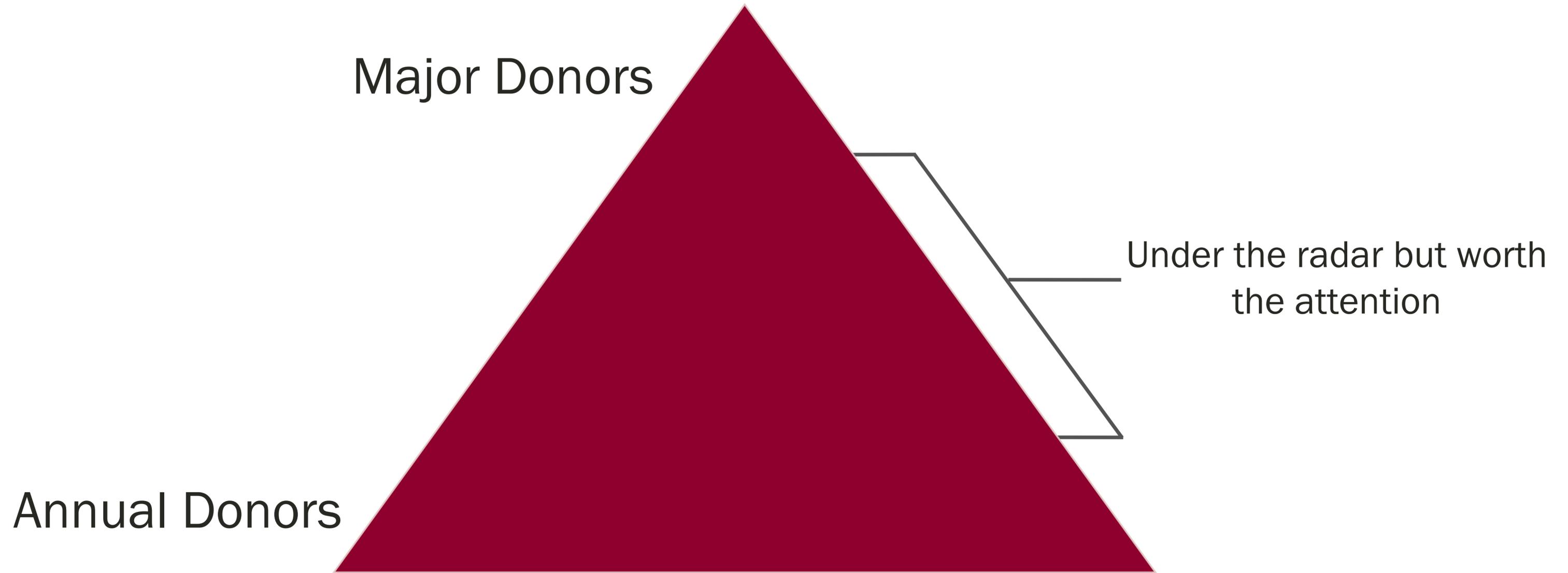


In Person
Site visits, 1:1
meetings, cultivation
events



Social Media
Facebook, Instagram,
Google all accept
donations

Create a Ladder for Upgrades



Middle Donors are your Major Gift Pipeline

Organizations
WITHOUT a mid-level
giving program

0.2%-1.2%
of donors in the
database migrate
to major gifts

Organizations
WITH a mid-level
giving program

3%-3.5%
3%-3.5% of donors in
the database migrate
to major gifts.

Hallmarks of a Mid-Level Program

Deep Substance

- Regular updates through print and e-mail
- Thought Leadership events
- Site visits

Consistent Branding and Messaging

- Giving Circles or Societies create instant recognition
- Materials reinforce synthetic family

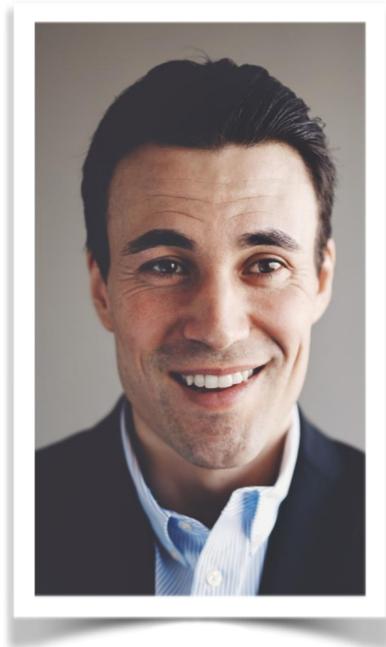
Communication Style Matters

- “Analog” preferred—print, phone, in-person

Personal Stewardship

- Impact Reports, Updates
- These donors want to know you “see” them

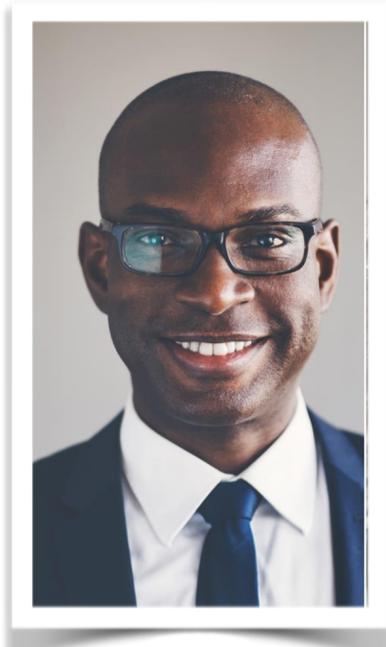
Prioritize Your Donors



1.

Current Donors

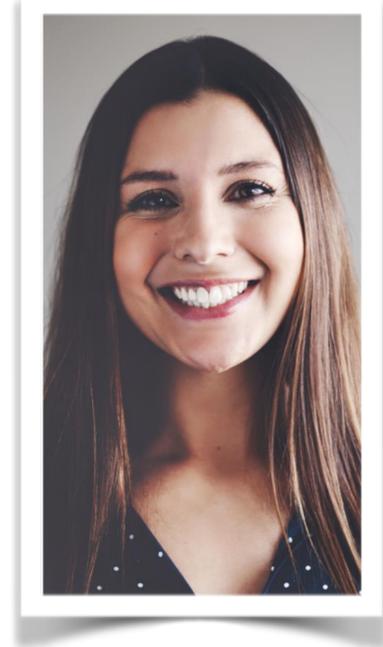
- Largest over their lifetime as donors
- Longest donors
- Lower-level donors who have deeper capacity



2.

New Donors

- Largest New donors
- Potential capacity
- Passion for organization

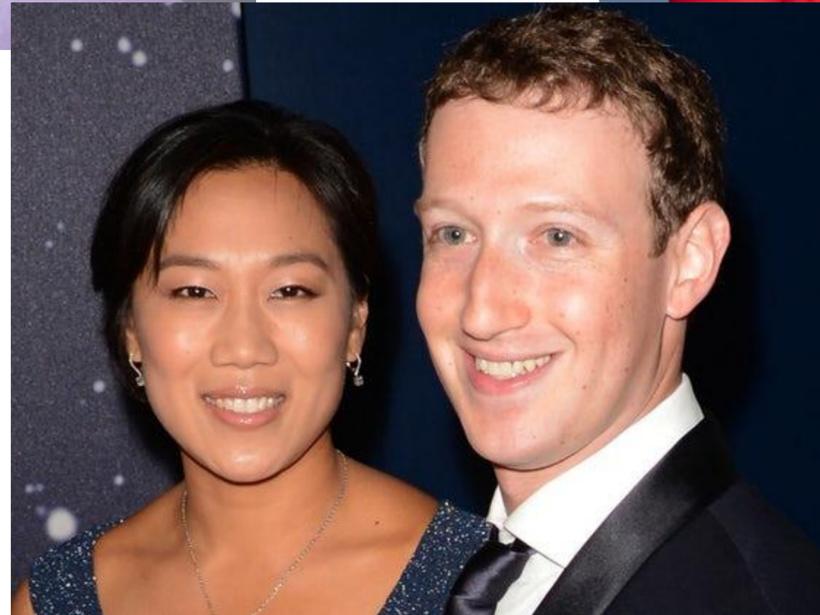


3.

Lapsed Donors

- Length of giving
- Cumulative Giving to you
- Screened capacity

Who Are Your Major Donors?



Your Major Donors Are...



Access

- Does this person have a relationship to you or other board members, staff, donors, others related to you?

Belief

- Does this person genuinely care about your mission?
- Is this person historically philanthropic toward similar causes?

Capacity

- Does this person have the financial ability and/or networks of those who can support you at a significant level?

Truth #3:

Major Gifts
Results from
Vision Not
Need



**“To keep a lamp burning we
have to keep putting oil in it.”**

–Mother Theresa



“ Fundraising under-performance, therefore,
is actually a failure to communicate. ”

—Penelope Burk, *Donor-Centered Fundraising*



“What does this trust exercise teach us?
Never take your donors’ support for granted.”

What Does A Donor Need to Be Satisfied?



Prompt,
meaningful gift
acknowledgment



Designation of gift to
a program, service
or project more
narrow in scope than
the charity's overall
mandate

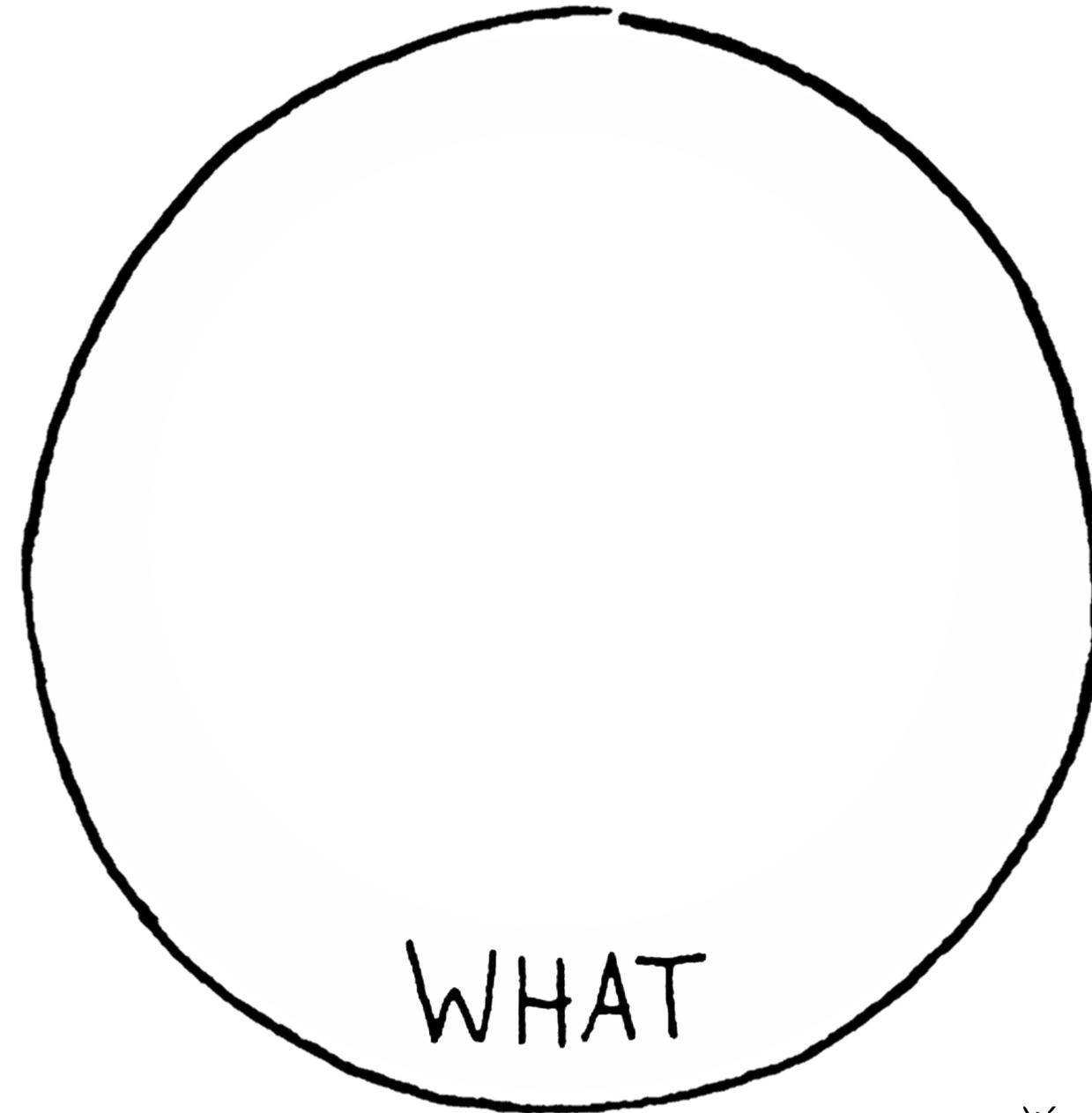


Measurable results
on the last gift
before being asked
for another one

The Golden Circle

WHAT

Every organization on the planet knows WHAT they do. These are products they sell or the services



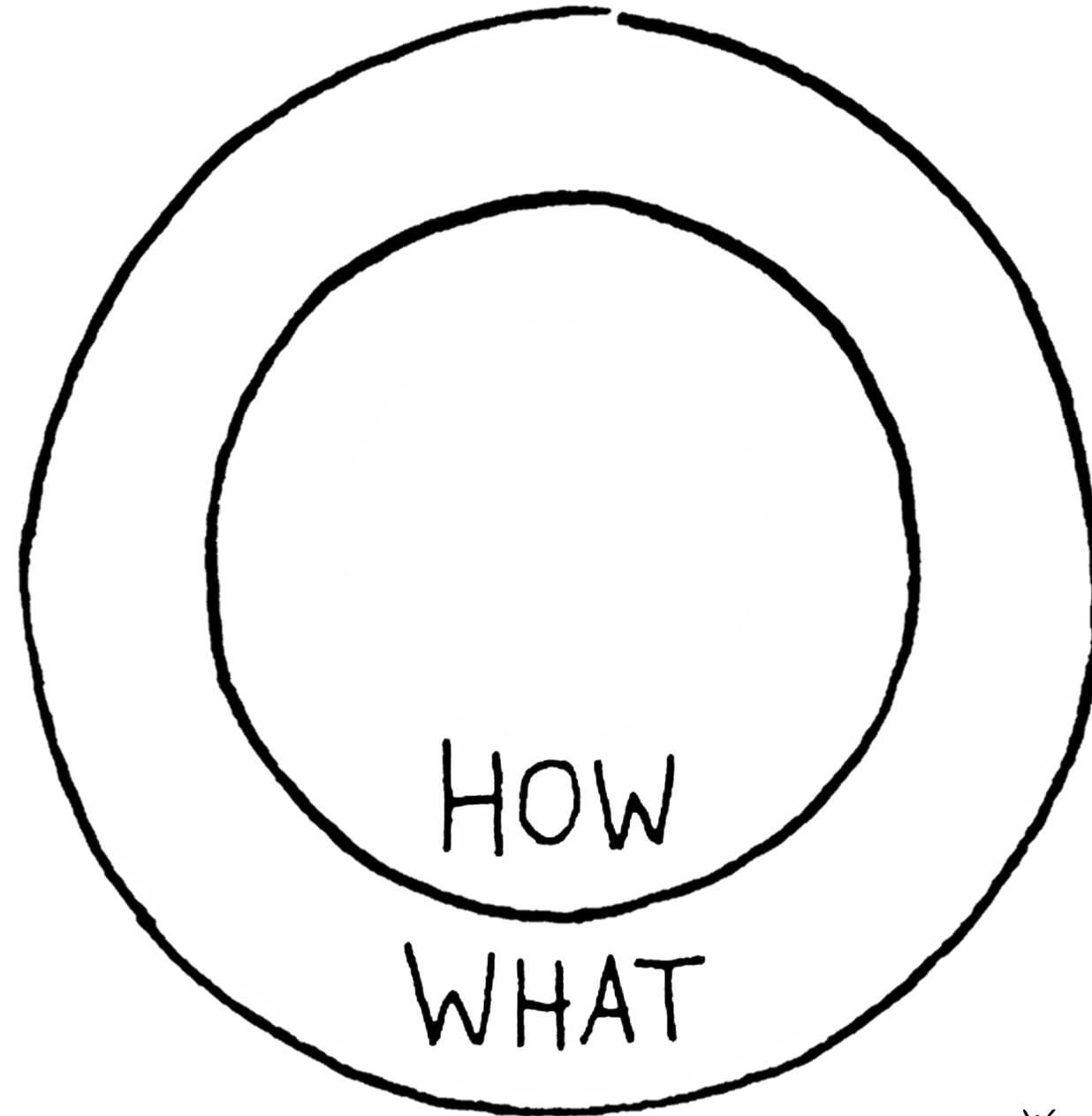
The Golden Circle

WHAT

Every organization on the planet knows WHAT they do. These are products they sell or the services

HOW

Some organizations know HOW they do it. These are the things that make them special or set them apart from their competition.



The Golden Circle

WHAT

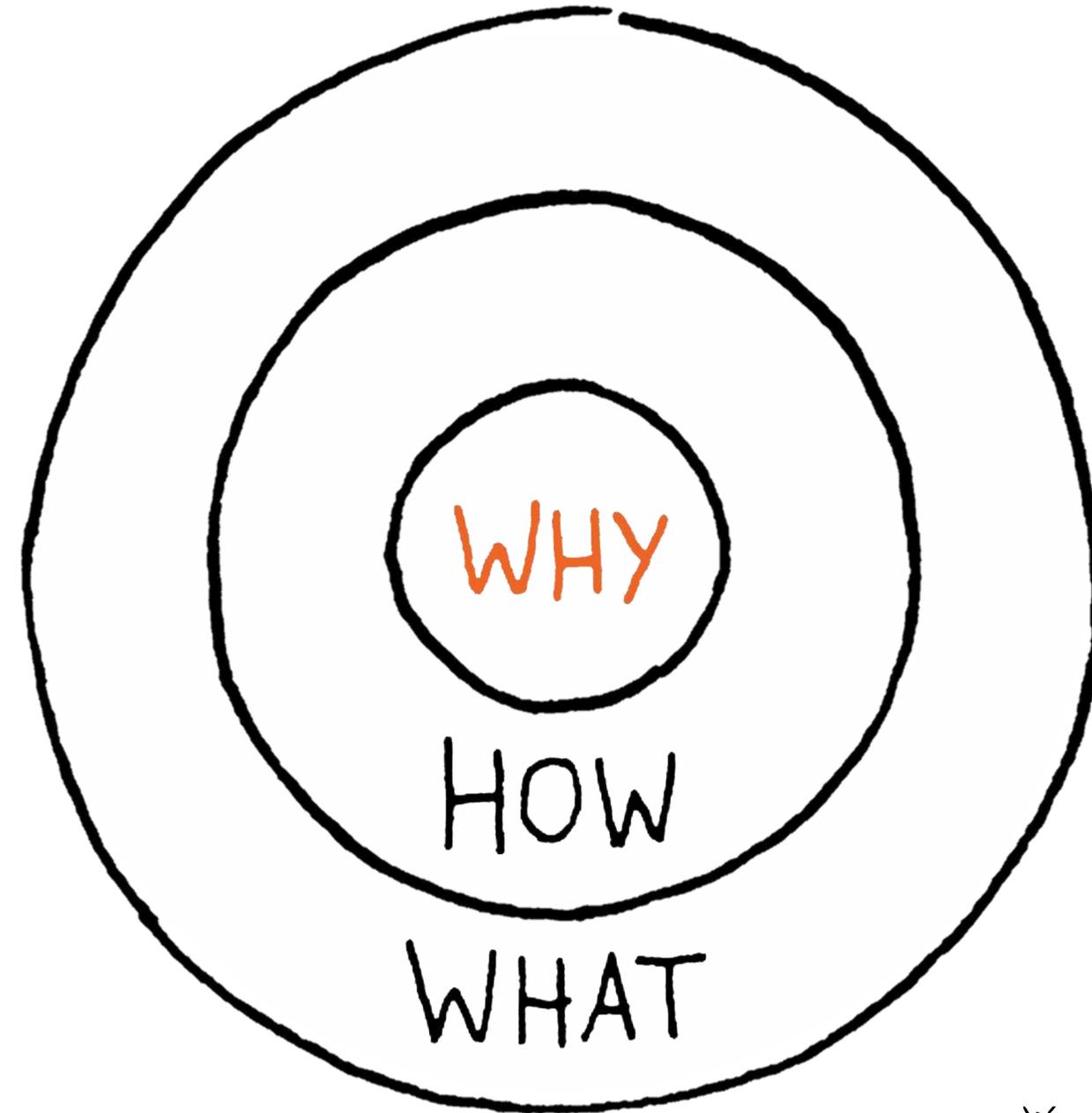
Every organization on the planet knows WHAT they do. These are products they sell or the services

HOW

Some organizations know HOW they do it. These are the things that make them special or set them apart from their competition.

WHY

Very few organizations know WHY they do what they do. WHY is not about making money. That's a result. WHY is a purpose, cause or belief. It's the very reason your organization exists.





What is your big, bold vision for the organization and what do you need to realize it?

One-on-One Visits with
a Board member
and/or ED or CEO

Thank you calls from
staff/Board/ED or CEO

Inclusion of staff visits with
prospects and donors

Site
Visits

Engage and Inspire

Quarterly in-person or
teleconference updates
with CEO or ED

Continued invitations to
established events with
strong follow-up

Opportunities to ask for
advice (market study, focus
groups, surveys)

Small cultivation
events

Truth #4:

Every Board Member Has a Fundraising Role to Play



Windmill Hill
CONSULTING LLC

BUILDING NONPROFIT EXCELLENCE
THROUGH EFFECTIVE FUNDRAISING

Boards Lead a Culture of Giving



Your Board

Hospitality

(We welcome donors to our organization)

Integrity

(We are transparent and accountable)

Community

(We inspire others to want to be involved in our work)

Gratitude

(We thank donors)

Source: "Major Gift Fundraising: Unlocking the Potential for Smaller Nonprofits," Amy Eisenstein and Adrian Sargeant, 2015

I can't picture in my mind a major gifts circle without the board being at the center of that. That culture just kind of permeates, emanates out from that circle. They're right there in the heart of it because they helped grow that culture...There's a hunger and experience of our mission, of our integrity, of our welcome, of our gratitude.

—Board member

Fundraising Isn't Just Asking For Money



Here's Why Board Giving Matters

1

Board member giving is a public commitment to the organization's work

2

Board members might pay increased attention to the nonprofit's mission and financial health when their own money is engaged

3

Many other donors and institutional funders will not give to organizations that don't have 100 percent board participation as current donors.

Find the Right Role for Each Board Member

- Offering names of personal/business contacts which are moved to prospects lists and into active cultivation
- Reviewing donor lists from other organizations and identifying potential supporters and/or “rating” current donors
- Augmenting information on current donors (i.e., who should contact, qualifying info)
- Making the initial contact with a donor or prospect to move towards further cultivation
- Being the primary member of a team making asks
- Writing personal, hand-written thank you notes to donors
- Making calls to donors, e.g. thank you calls, outreach to lapsed donors, calls to current for renewed contributions this year.
- Taking responsibility for personally cultivating or stewarding donors/guests at a special event
- Hosting a small event that introduces new networks to your organization
- Contributing to fundraising events: raising money, acquiring in-kind services/items, volunteering time
- Participating in training: during meeting, offsite, other

Boards Influence Donor Retention

93%

They would “definitely or probably give again the next time they were asked”

84%

They would “make a larger gift.”

74%

They would “continue giving indefinitely”



Windmill Hill
CONSULTING

Source: Donor-Centered Fundraising, Penelope Burk

“ I’VE LEARNED THAT PEOPLE WILL FORGET
WHAT YOU SAID, PEOPLE WILL FORGET WHAT
YOU DID, BUT PEOPLE WILL NEVER FORGET
HOW YOU MADE THEM FEEL. ”

-Maya Angelou



What's your verdict? Reality or myth?





The Coronavirus pandemic and a fluctuating economy are causing philanthropists of all levels to rethink and recalibrate their giving. It's no longer business as usual.

But trust us when we say the sky isn't falling. How do we know? Because we've fundraised through the October 1997 stock market mini-crash, burst out of the dot-com bubble of 2000, and survived the 2008 recession.

We've been in your shoes.

whillconsulting.com/fundraising-toolkit/

LET'S STAY CONNECTED

Want to chat further?

boreilly@whillconsulting.com

Interested in more resources?

www.whillconsulting.com

Follow me:

linktr.ee/boreillywhc

whillconsulting.com



Windmill Hill
CONSULTING

Thank you for joining!

For more information, contact:

contactus@qgiv.com | 888-855-9595



Donation Forms | Event Registration
Text Fundraising | Peer-to-Peer | Auctions