



Rachel
MUIR

RAISE MORE MAJOR GIFTS

March 28, 2024 | Qgiv

Rachel Muir, CFRE

- Founder: Girlstart
- Featured on: Oprah, CNN, the Today Show
- What Rachel does: online workshops & classes, custom training, board retreats

Weaknesses: chips, queso

rachel@rachelmuir.com

www.rachelmuir.com



Town crier for donor love



An overhead photograph of five business professionals (three women and two men) seated around a white, oval-shaped table in a meeting room. They are all focused on documents and papers spread across the table. One man in a pink shirt is pointing at a document. A woman in a blue top is writing. Another woman in a pink top is also writing. A man in a blue shirt is looking at a document. A woman in a black top has her hands clasped. The room has a dark wood floor and grey office chairs.

What Rachel does:

Custom training

Board retreats

Keynotes

Webinars

Workshops

Speaking

All on fundraising...

Learn more at www.rachelmuir.com

**Speaker, trainer and nationally
recognized non profit founder and
thought leader.**

GET TO KNOW RACHEL

www.rachelmuir.com

Housekeeping

Type questions in Q&A box

Chat into chat box



Our agenda for today



What major gifts are & how to get them

How to build & prioritize a portfolio

Strategies + tools to get your foot in the door

How major gift fundraising is different than ANY other type of fundraising



What is a major gift?

www.LeagueofExtraordinaryFundraisers.com



Annual Giving

- Frequently asked
- Quick decision
- Can often be done on 1st visit
- Given out of income
- Cash gift

Major Gift

- Visceral joy in making gift
- Requires personal visit
- Spouse should be included
- May require 2-3 visits
- Given out of assets
- 10-25 times annual gift

Annual giving vs major gifts

ROI of fundraising strategies

Strategy	Cost per \$1 raised
Direct Mail Acquisition	\$1.15
Special Events	50 cents
Planned Giving	25 cents
Direct Mail (to house file)	20 cents
Foundations/Corporations	20 cents
Major Gifts	5 to 10 cents
Monthly Donors	2 to 5 cents



What makes major gift fundraising
different than any other
kind of fundraising?

Want help from Rachel?
LeagueofExtraordinaryFundraisers.com

Success is not a magical combination of genetics and fashion sense. It's a series of time management behaviors which must be practiced regularly."

Brian Tracy, Eat the Frog





TRUTHS IN

FUNDRAISING



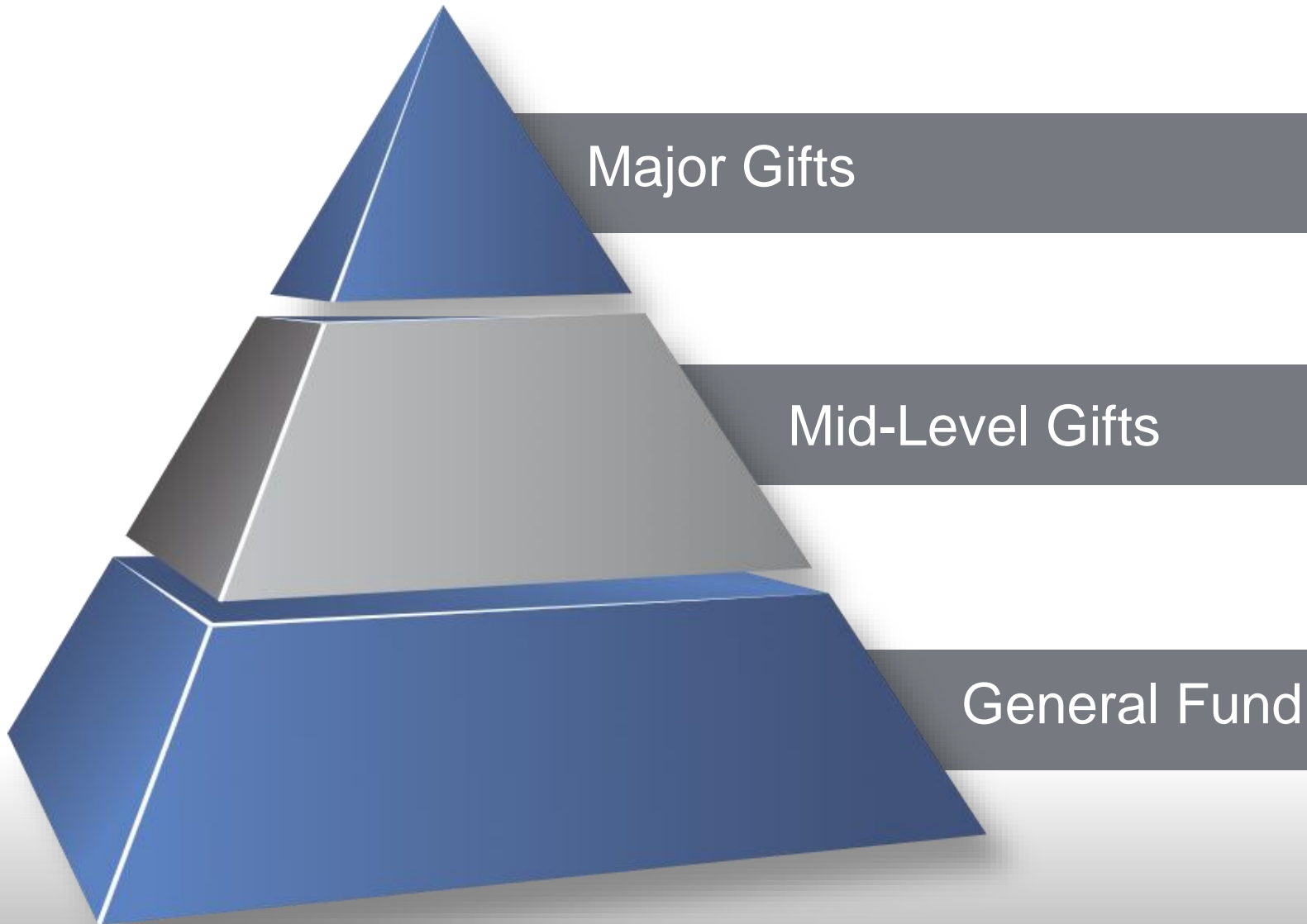
“

Your job is to get the largest gift possible
in the shortest amount of time
to the greatest joy of the donor. ”

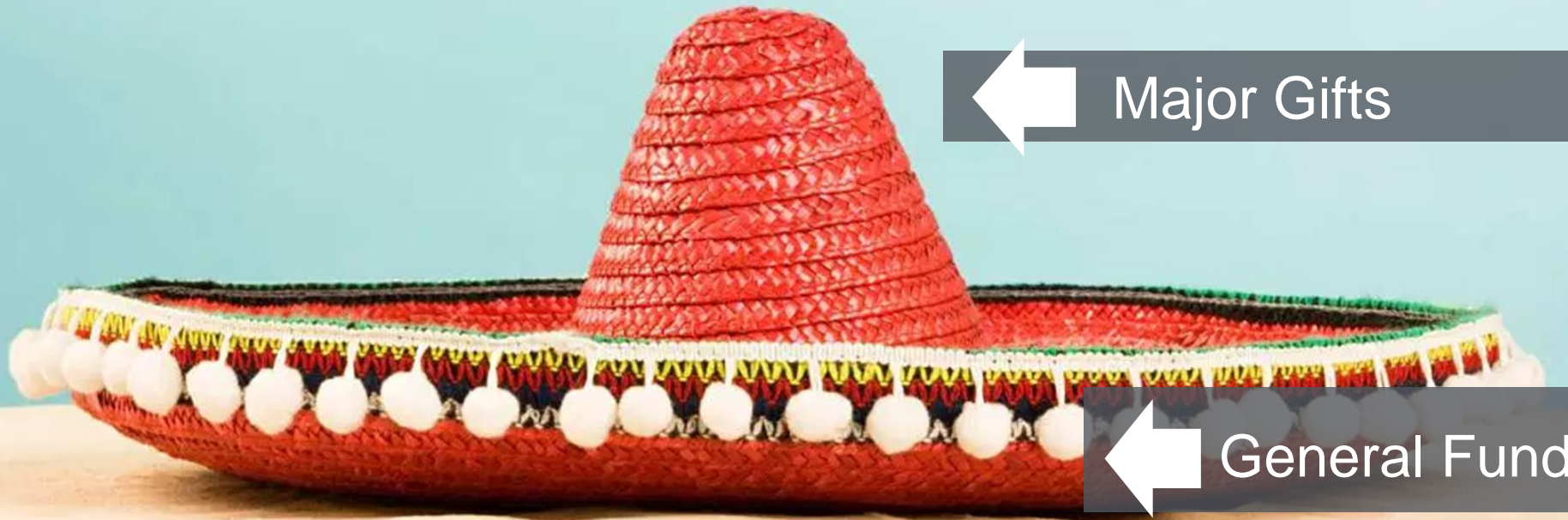
Jerry Panas

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The Myth of the Donor Pyramid



What it really looks like



Major Gifts

General Fund



More than 80% of
1M+ Harvard
donors started with
a gift of less than
\$500

Source: Lynne Wester The
4 Pillars of the Donor
Experience

Plan the donor journey

Relationships are a chain of activities that are only as strong as your weakest link.

- Strengthen every link in the chain—your welcome process, stewardship, relationship building, cultivation, etc.





What is a donor portfolio? How do I build one?

Get today's slides -> rachelmuir.com/handouts

Donor Portfolio



Prioritized caseload of high net worth donors who want to have a deeper relationship and will respond by retaining and upgrading their giving.

Touchpoints and ask goals are set to calendar year.

Donors move in/out.

Set ask goals for your donors

"If you don't know where

you are going, any road

will get you there."

-Lewis Carroll



Donor	FY 21	FY 22 Goal	Tier	Interest	Communic. Preferences	Jan	Feb	March	March Goal	March Actual	April
Charlie Brown	\$25,000	\$50,000	A	puppy mills	Email, phone	2022 welcome call from CEO	Puppy love val. card	Spay/neuter ask	30k		Thks CEO, Bd Pres
Peppermint Patty	\$10,000	\$25,000	B	feral cats	Email, phone	2022 welcome call from CEO	kitty val. card	Feline heat ask	20k		Thks CEO, Bd Pres
Snoopy	\$5,000	\$7,500	C	puppy mills	Visits	2022 note from CEO	Puppy love val. card	Spay/neuter ask	7.5k		Thks CEO, Bd Pres
Woodstock	\$1,000	\$2,500	C	feral cats	Visits	2022 note from CEO	kitty val. card	Feeline heat ask	2.5k		Thks CEO, Bd Pres

Apply Cultivation Plan & Ask Goal to Calendar



#4 Allows you to plan ahead for losses

#3 Ensures your donors get love and attention

#2 Manages realistic CEO/ED/board expectations

#1 Gives you realistic revenue projections



Who should be in my portfolio?

A photograph of a closet interior. A metal hanger rack is filled with light-colored, possibly cream or beige, clothing items. The items include a textured cardigan with buttons and a matching jacket. To the right, a full-length mirror is visible, reflecting the clothes. The overall lighting is soft and warm.

shop your Closet

There are 2 bare necessities...



Where are my
best major gift
prospects?



Who will
respond
to more
cultivation?

“

All donors are equal as human beings.
They are not equal as revenue sources.”

Jeff Brooks, [The Money Raising Nonprofit Brand](#)

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STEP #1: HOW TO PRIORITIZE YOUR

**TOP DONOR
PROSPECTS**

Fine-tune your prioritization

- ✓ Pull a list last 3 - 4 years
- ✓ Pick cumulative gift amount (i.e. \$1,000)
- ✓ Examine trends: gift size, loyalty, upgrading
- ✓ Examine behavioral data (volunteering, coming to events, etc.)



Major Gift Portfolio

MAXIMUM
150





How do I qualify a donor?

Want coaching from Rachel?
LeagueofExtraordinaryFundraisers.com

Pre-call letter to qualify donors

Dear DONOR NAME:

Thank you so much for all that you have done for the USA Swimming Foundation. Your support has made a tremendous difference in the lives of young swimmers and Olympic champions training to represent the United States.

Thanks in part to your support; our organization has been growing recently. **Each person who supports our organization has a story to tell** about how they got connected to the USA Swimming Foundation. Most are quite passionate about our mission **to save lives and build champions in the pool and in life.**

We realize many of our closest friends and donors need a point of contact here at USA Swimming. Sometimes it is to get more information about how your giving is championing athletes in and out of the pool. Sometimes it is to express concerns or share an idea. **We want to understand what you need from us and regularly tell you how you are making a difference.**

Debbie Hesse, Executive Director of the USA Swimming Foundation, and the leadership here have appointed me to fulfill this goal. I report directly to Debbie. **I would like to get better acquainted with you and understand how I can best serve you as we impact the lives of more swimmers at all levels.**

I am committed to giving you every opportunity to learn how your gifts impact the lives of our swimmers, teams, and families. I look forward to getting better acquainted with you and learning what you need from us. I will be contacting you to

Date

Donor Name

Address

City, Zip

Dear DONOR NAME:

Thank you so much for all that you have done for Bethlehem House. Your support has given hope and a home to expectant mothers and their beautiful new families when they needed it most.

My name is Joanne Hull and I'm honored to have joined Bethlehem House this May as Executive Director. (Or "I'm honored to be a part of the Bethlehem House family serving as _____")

While COVID-19 raged outside our doors the safe refuge of Bethlehem House has welcomed nine new babies and fielded hundreds of calls from pregnant mothers seeking help – all thanks to you!

%FirstName%, you are a vital part of our family.

I would love to meet you – in person, virtually, or over the phone – to learn about what is important to you and why you so generously choose to support Bethlehem House as the place where you share your gifts and talents.

Each person who supports our organization has a story to tell about how they got connected to Bethlehem House and I'd love to hear yours!

I'm committed to giving you every opportunity to learn how your gifts impact the lives of our mothers and babies.

I look forward to getting better acquainted with you and learning what you need from us. Here is link to my calendar so that you may book a time that works best for you to chat: (insert Calendly link here)

I will be contacting you next week by phone to schedule a visit with you in whatever manner you prefer – virtual, in person or just a quick chat over the phone - to understand how we can better serve you and hear any questions, concerns or requests you might have.

Thank you %FirstName%, for all you do for Bethlehem House. Should you need anything you can call me directly at _____ My e-mail address is _____

I am looking forward to talking with you.

For the babies,

Joanne Hull

TITLE

Who to qualify



- × New donors
- × Donors who you don't know well
- × Donors you think you can upgrade

Donor Prioritization for Small Shops

Pre-call letter

Call & email

7-10 tries

Non-responder letter/survey

Final note



Want coaching from Rachel?

LeagueofExtraordinaryFundraisers.com

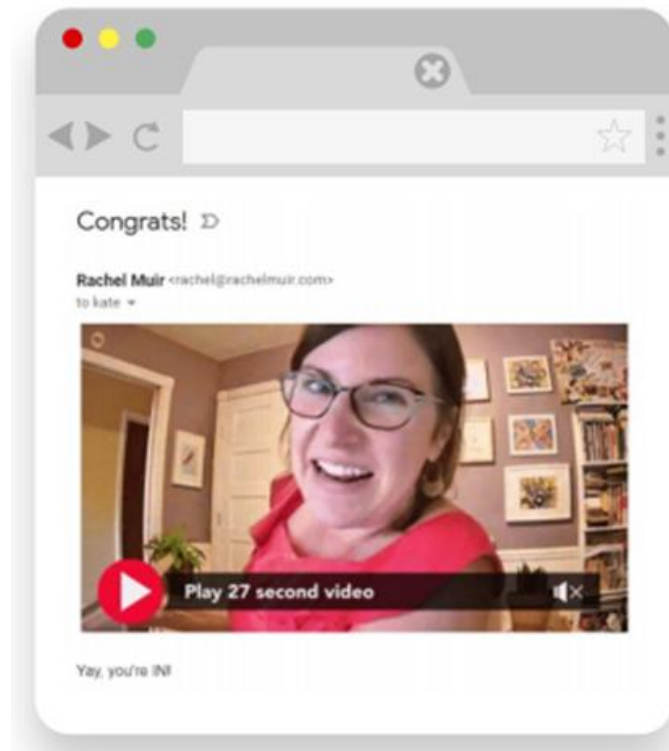


Tips to get your foot in the door

Get today's slides -> rachelmuir.com/handouts

Bomb Bomb Video Email

- Uses your webcam or camera on mobile phone
- Perfect for getting the (virtual) visit and stewardship
- You can record directly from your email or use branded email stationary with your logo



Facility Tour

Lunch with ED

Ground Breaking

Send Donor Packet

Card, anniv of 1st gift

Birthday Card

Board Member Call

Program Graduation

Invite to Gala

News Clippings

Mail Annual Report

Donor Reception

Program Performance

Meet the Candidates

Community Meal

The invitation is the cultivation.

Sample touches

- Comment on an article about them
- Leverage their expertise and knowledge
- Invite for a tour, reception, behind the scene event, planning session
- Discuss topic that has nothing to do with ask
- Surprise them, do something nice for them
- Call with personal project update on what they funded

Want ideas to cultivate major donors?



RachelMuir.com/DonorLove

Donor Thought Circles



Intimate
group in
controlled
social setting

Read 5
questions;
take notes

Light
meal,
coffee or
cocktails

Identify
“dominators”
Go around
circle.

Passing
allowed.

Recipe for a donor thought circle

Source: Robbe Healey, Aurora Philanthropic Consulting

5 questions for a donor thought circle

- 1 What connected you to us?
- 2 What made you decide to become a donor?
- 3 How could we encourage others to give to us?
- 4 How could we make you feel more special and appreciated?
- 5 What would make people feel more special and appreciated?

Donor Cultivation Events



You're Invited!
Come Fly a Drone
@ Girlstart Summer Camp
Thursday, June 23, 2016
9:30am-10:45am
Girlstart STEM Center

RSVP Today

You're invited to a behind the scenes Girlstart Summer Camp experience! Come enjoy a light breakfast, network with other friends of Girlstart, see summer camp in action, and fly one of our awesome drones!

Flying Drones with Girlstart

by Douglas Ray | Jun 30, 2016 | Blog, SG Community | 0 comments



Have you ever flown a drone? I haven't. I've heard about them. I've seen them. But, I've never held the controls. So when Girlstart invited me out to check out what they've got planned for their next summer camp, I couldn't say no.

Girlstart is a nonprofit who was supported by Modernize at Startup Games: Austin 2016. They focus on encouraging girls in learning about and participating in STEM (Science, Technology, Engineering, and Math) areas. They have year-round education programs, including a series of summer camps that focus on various areas of study.

A small crowd gathered on a Thursday morning at Girlstart HQ (including a contingent from Modernize) where their team introduced us to their squadron of drones and plans for the camp. Their plan: teach the girls about manufacturing and aerospace engineering. How? Harry Potter. Or more accurately Hermione. She's solving the crisis Hogwarts just encountered with their owls all getting sick, and mail now needing new transportation.

The girls will learn about the drone's specs, design a carrier, and then guide the drone safely to its destination. In teams of four, they'll have to work together to save Hogwarts.

The group received an opportunity to test these Hogwarts-saving drones out. We learned to take off, fly, and most importantly land. I can now say that I've flown a drone. And, not to brag, but I'm pretty good. These drones work on a two joystick system that made my time spent playing video games totally validated.

Girlstart has a fascinating approach to engaging girls with real-world applications of STEM while integrating interesting stories.

“

67% of respondents attending a donor cultivation event credited it as the **reason why they made their gift.**

Penelope Burk

THANK YOU!

www.rachelmuir.com

rachel@rachelmuir.com

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Questions?

Want more help from Rachel?

**How to Use AI
in Fundraising**



March

**Epic
Fundraising
Examples**



April

**How to Find
New Donors**



May