GETTING STARTED WITH MAJOR GIFTS

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OBJECTIVES

- Identify executive director and board roles in major gifts
- Retain and upgrade existing donors
- Confidently begin new relationships with prospects
Why Major Gifts?
Major or Planned Gifts

Leadership Annual Fund Gifts

Renewing and Recurring Annual Fund Gifts

Entry Point Gifts
Definitions

Annual Fund

Campaign

Major Donor

Major Gift
Definitions

Major Donor 5%
Board Roles

- Lead generator
- List reviewer
- Phone-a-thon caller
- Door opener
- Fundraiser
- Leadership donor
Executive Director

Roles

- Everyday maximizer
- Programmatic expert
- Fundraiser
- Documenter
- Leadership donor
Retain & Upgrade
Who should move up?
• Gives at mid-range levels
• Consistent giving
• Indicators of wealth
• High engagement
How does an entry level donor become a leadership level donor?
Make it PERSONAL!
## Sample stewardship matrix

<table>
<thead>
<tr>
<th></th>
<th>Gift acknowledgment letter signed by Director of Development</th>
<th>Phone call or handwritten note from Director of Development</th>
<th>Gift acknowledgment letter signed by Executive Director</th>
<th>Phone call or handwritten note from Executive Director</th>
</tr>
</thead>
<tbody>
<tr>
<td>All donors (nonboard)</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Donors of $250 to $999</td>
<td>x</td>
<td>x</td>
<td></td>
<td></td>
</tr>
<tr>
<td>New monthly donor</td>
<td>x</td>
<td>x</td>
<td></td>
<td></td>
</tr>
<tr>
<td>First-time donors of $50 to $249</td>
<td>x</td>
<td>x</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Board Gifts</td>
<td></td>
<td></td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Donors of $1,000+</td>
<td></td>
<td></td>
<td>x</td>
<td>x</td>
</tr>
</tbody>
</table>
Personalized Stewardship calls

- Set aside time EVERY day
- Write a script
- Practice with a smile
- Prepare for voicemail
- Ask open ended questions
- Ask for a meeting
EXERCISE

Pair up and practice a stewardship call.
Other Ideas for Personalized Touchpoints

- Handwritten notes
- Personalized signature on form letters
- Invitations to events
- Send a news article
- Invitations to see your work in person
- In-person meetings to ask, thank, update
- Send a great story of a participant
- Send a thank you note handwritten by a participant
- Drop a note when you see them in the news
- Send a birthday card
- Send a holiday card
Donor Meetings

When, where, why?
Donor Meetings

How?
Donor Meetings

How to get the meeting?

• Email first
• Letter first
• Phone call
• Be persistent!
Donor Meetings

How to conduct the meeting?

- Small talk
- Discovery questions
- Updates
- Thank you note
How did you first get involved?

What are your impressions of the organization now?

How do you like to give?

Are you interested in getting involved in other ways?

What are our strengths and weaknesses?

What are your personal giving priorities?

What inspires you most about this work?

Who else should get involved?
Finding New Major Donors
Major Donor Prospects

- Capacity
- Inclination
- Connection
Sources of New Prospects

- Board connections
- Volunteers
- Event attendees
- Large donors to similar organizations

In visits with existing donors, always end with, “Who else should I be talking to about our work?”
Common Mistakes

- Treating Donor Advised Funds and Family Foundations as foundations
- Fearing money and the people who have it
- Giving up after one or two emails
Suggested Resources

- Claire Axelrad’s Donor Thank-You Calls E-Book and Script, available at https://clairification.com/thank-you-calls-ebook/
- John Greenhoe’s book, Opening the Door to Major Gifts: Mastering the Discovery Call
- Asking Matters’ Find Your Asking Style quiz, available at https://askingmatters.com/
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