

# Major Giving/Grants

Donor Perfect

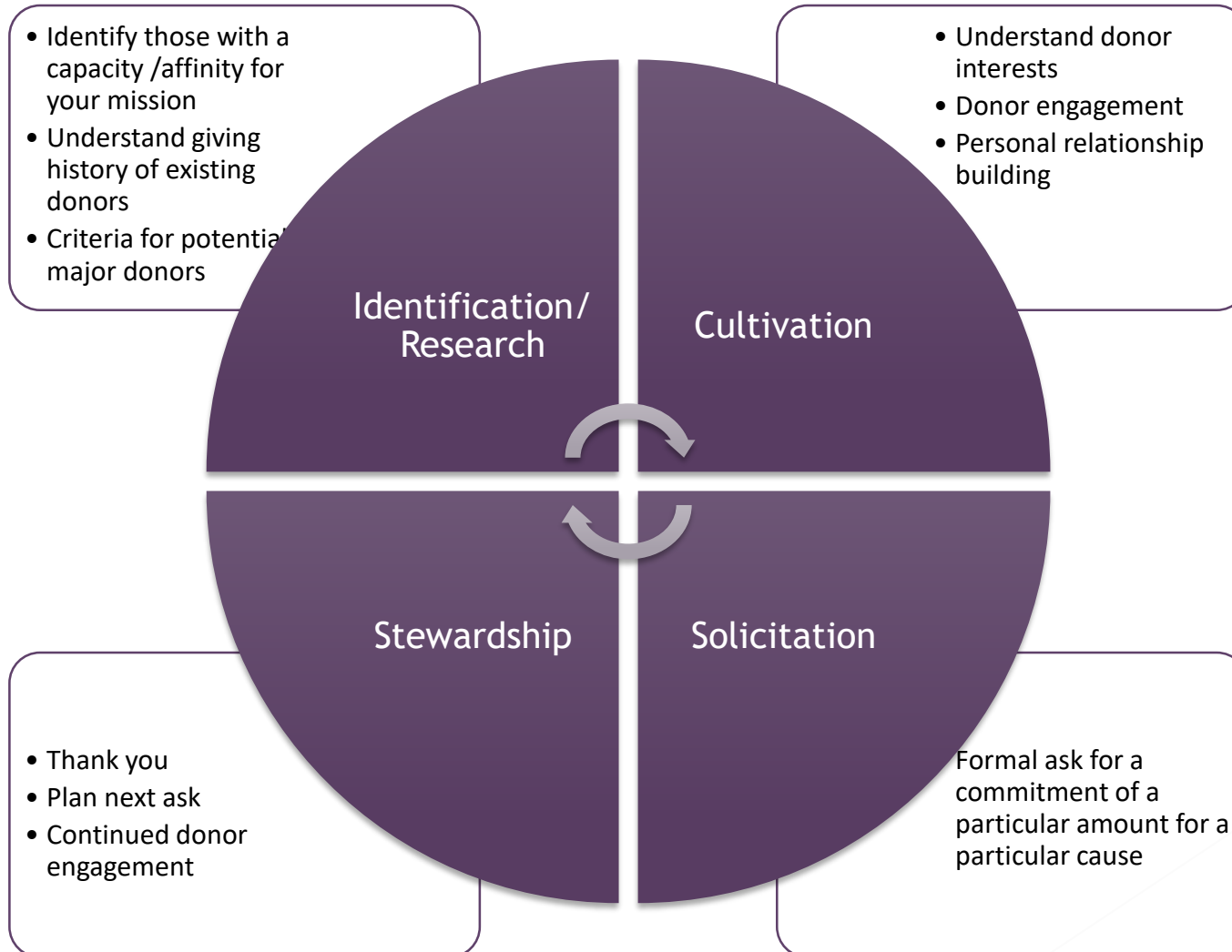
# Agenda

- ▶ Welcome
- ▶ Introductions
- ▶ Presentation/Discussion
- ▶ Wrap Up



# Life Cycle of a Major Gift

What Constitutes a Major Gift? ( For some organizations it might be \$1,000. For others it could be \$100,000)



# Major Giving- Identification



# Finding Major Donors

- ▶ How to Cultivate Major Donors?
  - ▶ What constitutes a pledge?
  - ▶ Readiness?
  - ▶ Internal Priority
  - ▶ Likelihood of donation
  - ▶ Solicitor- Think about long term relationship building
  - ▶ Ask amount
- ▶ What is already in system that you can pull?
  - ▶ Past giving trends- frequency, amount, program preferences



# Select Prospects

- ▶ Consider your organization's bandwidth. How many prospects can you manage?
- ▶ Set reasonable goals for the # of prospects and a \$ amount.



# Capture necessary data

- ▶ Bio Screen: Major Donor Cultivation includes rating, income, interests, Ask Amount and Cultivation status
- ▶ Gift/Pledge screen

## Major Donor Cultivation

Prospect Rating

Income Level

Donor Interests

- Disaster Relief
- Education
- Healthcare Programs
- Homeless Programs
- Physical Education

Ask Amount

Staff Contact

Gift Types

- Charitable Remainder Trust
- Pooled Income Fund
- Real Estate
- Stock

Cultivation Status

Board Contact

Cultivation Status







Board Contact

- Ask Completed successfully
- Ask In Progress**
- Ask is delayed
- Ask Unsuccessful
- Assigned a Solicitor
- Find a Solicitor



# Capture necessary data

- ▶ Flags: Major Donor/ Major Donor Prospect
- ▶ Source of Contact
- ▶ Assign a solicitor- Main Screen/Gift screen
- ▶ Schedule follow-up- Contacts

| ID   | FULL_NAME_AND_ADDRESS  | GIFT_TOTAL | YTD      | LAST_CONTRIB_AMT | LAST_CONTRIB_DATE | AVERAGE_GIFT | YRS_DONATED | CULT          | SOLICITOR |   |
|------|--|------------|----------|------------------|-------------------|--------------|-------------|---------------|-----------|---|
| 1250 |  Allen Zztest / 123 S. State St / Chicago, IL 60618               | 21,000.00  | 5,000.00 | 5,000.00         | 01/31/2017        | 7000         | 2           | NEEDSSOL      |           |    |
| 1318 |  Albert Zztest / 1727 W Vanburen / Chicago, IL 60645            | 50.00      | 0.00     | 50.00            | 03/30/2016        | 50           | 1           | ASKINPROGRESS | DMC       |  |
| 16   |  Dr. & Mrs. Roger Zztest / 1407 Lincoln Dr W / Ambler, PA 19002 | 77,155.00  | 9,300.00 | 2,300.00         | 01/30/2017        | 1794         | 12          | ASKINPROGRESS | JCN       |  |





# Mine the Data

► Use standard and Custom reports

## REPORTS

[USER-DEFINED REPORTS](#)
[DONOR/GIFT LISTINGS](#)

[Add/Delete Reports](#)

- [Edit Comprehensive Donor Revenue Analysis](#)
- [Edit Donor Recognition Report](#)
- [Edit Last Year But Not this Year](#)
- [Edit Some Year But Not This Year](#)
- [Edit Top Donor Listing](#)
- [Edit Last 3 years of Giving](#)

| Last 3 years of Giving |                            |            |                 |                 |                  |                 |
|------------------------|----------------------------|------------|-----------------|-----------------|------------------|-----------------|
| Gift Total             | Last Name                  | First Name | 3 Years Ago YTD | 2 Years Ago YTD | Last Year YTD \$ | Year-to-date \$ |
| 379,100                | Home Depot                 |            | 0               | 0               | 0                | 0               |
| 270,665                | Humphrey                   | Jon        | 25,000          | 25,000          | 19,650           | 500             |
| 220,050                | Honest Politics Foundation | The        | 50,000          | 50,000          | 0                | 0               |
| 101,240                | Kashub                     | Jonathan   | 0               | 0               | 0                | 0               |
| 96,115                 | Kinko's                    |            | 0               | 0               | 0                | 0               |
| 77,155                 | Zztest                     | Roger      | 17,500          | 500             | 2,000            | 9,300           |
| 61,565                 | Woodley                    | Craig      | 25,000          | 0               | 0                | 0               |
| 40,450                 | International Software     |            | 6,000           | 0               | 0                | 0               |
| 35,000                 | SofterWare, Inc.           | Roger      | 10,000          | 0               | 0                | 0               |
| 28,490                 | Relles                     | Alvin      | 100             | 0               | 0                | 0               |
| 28,000                 | Zztest                     | Denny      | 0               | 500             | 18,100           | 9,400           |
| 27,275                 | Marlowe                    | Mary       | 500             | 0               | 0                | 0               |
| 26,315                 | Specter                    | Arlen      | 0               | 0               | 0                | 0               |
| 25,525                 | Zztest                     | Jeremy     | 20,000          | 0               | 25               | 5,500           |
| 25,515                 | Ford Foundation            |            | 0               | 0               | 0                | 0               |
| 25,000                 | Sheehan                    | Lauren     | 25,000          | 0               | 0                | 0               |
| 21,000                 | Zztest                     | Allen      | 0               | 0               | 16,000           | 5,000           |
| 21,000                 | Zztest                     | Carrie     | 0               | 10,000          | 6,000            | 5,000           |

## TOP LIFETIME DONORS

4:55 PM

Total History

| Donor Name                                | Gift Total | Last Gift  | Amount |
|---|------------|------------|--------|
| <a href="#">Home Depot</a>                | 379,100    | 01/01/2012 | 5,000  |
| <a href="#">Humphrey, Jon</a>             | 270,665    | 01/31/2017 | 500    |
| <a href="#">Honest Politics Foundatio</a> | 220,050    | 01/03/2015 | 50,000 |
| <a href="#">Kashub, Jonathan</a>          | 101,240    | 12/21/2013 | 50     |
| <a href="#">Kinko's</a>                   | 96,115     | 01/01/2012 | 5,000  |
| <a href="#">Zztest, Roger</a>             | 77,155     | 01/30/2017 | 2,300  |
| <a href="#">Woodley, Craig</a>            | 61,565     | 05/01/2014 | 25,000 |
| <a href="#">International Software</a>    | 40,450     | 09/01/2014 | 2,000  |
| <a href="#">SofterWare, Inc., Roger</a>   | 35,000     | 12/29/2014 | 10,000 |
| <a href="#">Relles, Alvin</a>             | 28,490     | 12/24/2014 | 100    |
| <a href="#">Zztest, Denny</a>             | 28,000     | 01/31/2017 | 4,400  |
| <a href="#">Marlowe, Mary</a>             | 27,275     | 02/03/2014 | 500    |
| <a href="#">Specter, Arlen</a>            | 26,315     | 01/01/2012 | 350    |
| <a href="#">Zztest, Jeremy</a>            | 25,525     | 01/31/2017 | 5,500  |
| <a href="#">Ford Foundation</a>           | 25,515     | 10/08/2009 | 500    |
| <a href="#">Sheehan, Lauren</a>           | 25,000     | 12/26/2014 | 25,000 |
| <a href="#">Zztest, Allen</a>             | 21,000     | 01/31/2017 | 5,000  |
| <a href="#">Zztest, Carrie</a>            | 21,000     | 01/31/2017 | 5,000  |



# Automate as much as possible

- ▶ Smart Actions: Set limits at time of gift input to trigger: Flags, Emails, Assign solicitor and schedule follow-up on Contact Screen
- ▶ Major Donor Staff Follow-up Report

| Major Donor Follow Up by Assigned |            |           |            |                |   |
|-----------------------------------|------------|-----------|------------|----------------|---|
| Assigned To                       | Due Date   | Last Name | First Name | Activity       | Notes   |
| Debbie McCann                     | 02/07/2017 | Zztest    | Brianna    | Telephone Call | Follow Up to >=5000 gift  |
|                                   | 02/07/2017 | Zztest    | Denny      | Telephone Call | Follow Up to >=5000 gift  |
| Jill Niewoehner                   | 02/07/2017 | Zztest    | Bob        | Telephone Call | Follow Up to >=5000 gift  |
|                                   | 02/07/2017 | Zztest    | Jeremy     | Telephone Call | Follow Up to >=5000 gift  |
|                                   | 02/07/2017 | Zztest    | Allen      | Telephone Call | Follow up to \$5,000 Gift   |
|                                   | 02/07/2017 | Zztest    | Carrie     | Telephone Call | Follow Up to >=5000 gift  |
|                                   | 02/08/2017 | Zztest    | Denny      | Telephone Call | Follow Up to >=5000 gift  |
|                                   | 02/24/2017 | Zztest    | Roger      | Meeting        | I spoke to Roger about donating to the Education fund for the new Health Program. He is very interested . I gave him the paperwork. He will get back to us at the end of February. We discussed 25k-30k |



# Major Giving- Cultivation



# Cultivation

- ▶ Engage donors personally (not mass mailing)
  - ▶ Tie their gift to something meaningful to them
    - ▶ Use the Bio screen/DonorSearch add-on
- ▶ Create a mindful plan (Moves Management will help)
  - ▶ how to capture the interactions between board members/executive staff's cultivation efforts.



# Cultivation

- ▶ Create contacts for every interaction with MD/Prospects
- ▶ Contacts
  - ▶ Phone calls, mailings, meetings, follow-up: Create institutional knowledge
  - ▶ Amount and date of ASK
  - ▶ Set reminders

## Contact Details

Contact/Entry Date

Due Date

Time

Completed Date

Activity

Mailing Code

Assigned To

Plan Name

Plan Action

Document Path

Notes

Contact Email

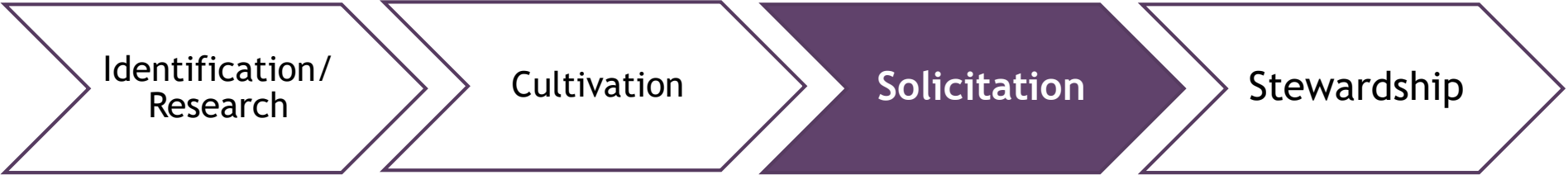
## OPEN CONTACTS

This section shows up to 100 open contacts that are either overdue or scheduled for the next 7 days.

| Name                                      | Due Date  | Activity       |
|---|-----------|----------------|
| The Floyd Zztest Family Foundation (1234) | 1/27/2017 | Telephone Call |
| Allen Zztest (1250)                       | 2/7/2017  | Telephone Call |
| Carrie Zztest (1256)                      | 2/7/2017  | Telephone Call |
| Jeremy Zztest (1275)                      | 2/7/2017  | Telephone Call |
| Bob Zztest (1251)                         | 2/7/2017  | Telephone Call |
| Denny Zztest (1264)                       | 2/8/2017  | Telephone Call |



# Major Giving- Solicitation



# Solicitation

- ▶ Document all pledges
  - ▶ Use a formal Pledge form
  - ▶ Assign a solicitor at gift level
- ▶ Moves Management
  - ▶ MM Reports
  - ▶ Link Pledges to Actions



Create Next Action in Plan

Plan Name: Capital Campaign Phase III: Major Donors

Available Actions:

| #                                  | Title                              | Activity       | Created |
|------------------------------------|------------------------------------|----------------|---------|
| <input type="radio"/> 1            | Introductory Letter from President | Mailing        |         |
| <input type="radio"/> 2            | Invitation to Luncheon             | Email Out      | ✓       |
| <input type="radio"/> 3            | Luncheon                           | Meeting        |         |
| <input type="radio"/> 4            | Phone Follow-up                    | Telephone Call |         |
| <input checked="" type="radio"/> 5 | The Ask                            | Visit          | ✓       |

Optional Contact Data

Due Date: 2/24/2017

Due Time:

Assigned To:

Completion Date:

Additional Comment:

# Major Giving-Stewardship





# Stewardship

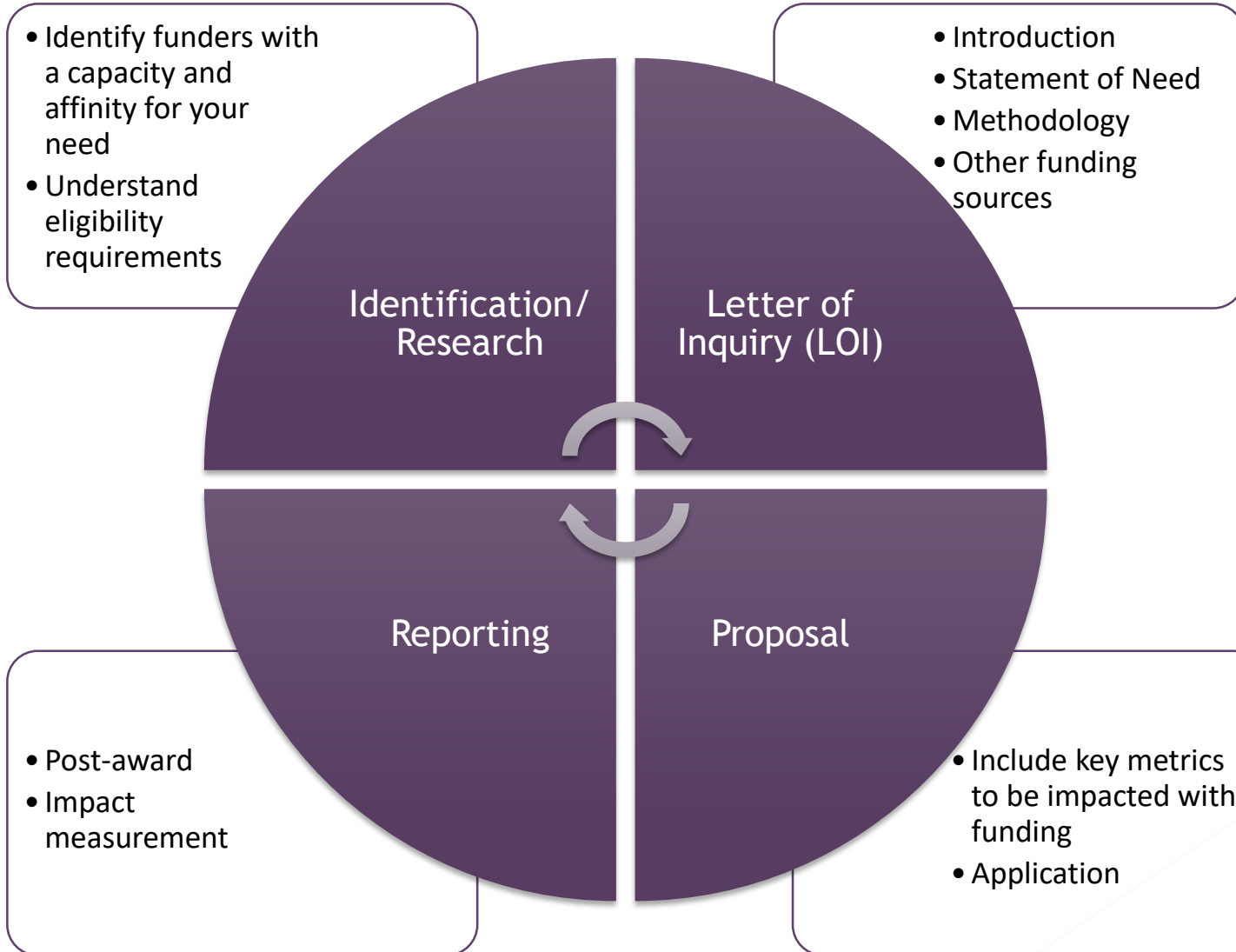
- ▶ Set Contacts for Check-ins: Smart Actions for interval follow-up (ie. every 6 months)
- ▶ Link pledge payments to pledges. Pledges must be entered in a timely manner so they are available when payments come in.
- ▶ Discussion: When is it time to start a new Ask?



# Grant Management






# Grant Management LifeCycle



# Grant Management

- ▶ Add Grantor as an Organization
- ▶ Track Grant Status via Contacts
- ▶ Link Grant Approval to Pledge

|   | Due Date   | Completed Date | Activity Code    | Mailing Code | Date Funded | By Whom (Contact) | Notes                         |
|---|------------|----------------|------------------|--------------|-------------|-------------------|-------------------------------|
|    | 01/31/2017 | 01/31/2017     | Grant Approved   |              | 01/31/2017  | Jill Niewoehner   | 1/31/2017 -Pledge entered/... |
|  | 01/15/2017 | 01/15/2017     | Grant Report Due |              |             | Jill Niewoehner   | Mailed RFP to funder          |
|  |            | 11/30/2016     | Grant Proposal   |              | 01/31/2017  | Jill Niewoehner   | Spoke about upcoming grant... |

Total Records: 3

<< < Page 1 of 1 > >>



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# Online Resources

- ▶ [www.w4sight.com\usergroups](http://www.w4sight.com/usergroups)
- ▶ Integrating Outlook with DPO
  - ▶ <https://www.donorperfect.com/nonprofit-technology-blog/2007/10/new-donorperfect-online-makes-it-easier/>
- ▶ Creating Smart Actions
  - ▶ <http://www.softerware.com/kb/KnowledgebaseArticle56243.aspx>
- ▶ Using Moves Management
  - ▶ <https://www.softerware.com/kb/KnowledgebaseArticle52888.aspx?Keywords=moves+management>
- ▶ Grant Management
  - ▶ <https://www.softerware.com/kb/KnowledgebaseArticle53231.aspx?Keywords=grant>

