

Major Giving/Grants

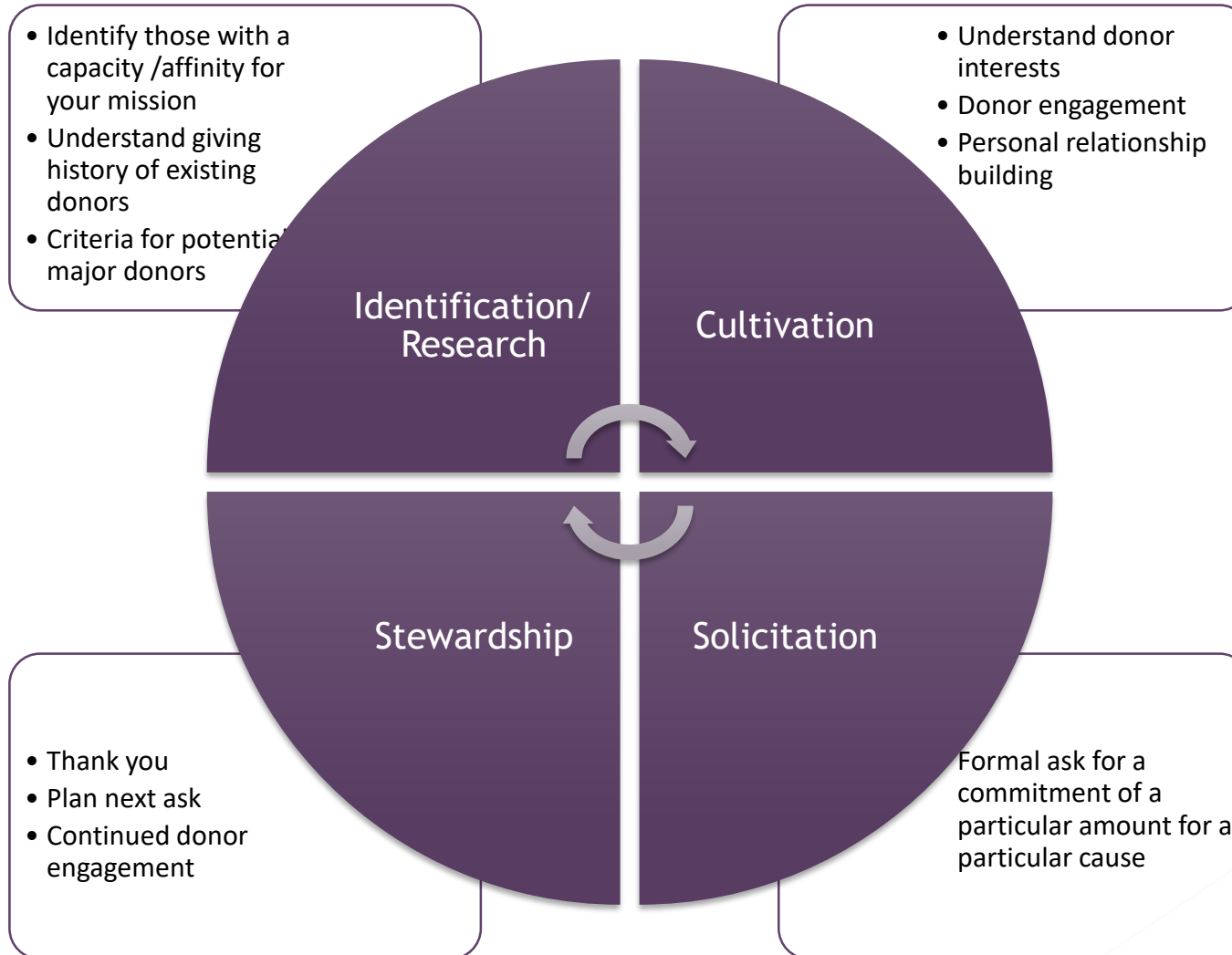
Little Green Light

Agenda

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



Life Cycle of a Major Gift



Major Giving- Identification



Finding Major Donors


- ▶ What is already in system that you can pull?
 - ▶ Past giving trends- frequency, amount, program preferences
 - ▶ Set up Smart Fields to get specific totals for each calendar year or fiscal year – these can be exported on a constituent report.
 - ▶ Search for constituents who have made gifts in the time period you want to analyze

All of the following are true

Constituent Type ▼ Individual ▼

Gift dates ▼ Custom dates ▼ 1-1-2015  to 

Gift types ▼ include any ▼ Gift, Pledge, Soft Credit **Status:** Any ▼

[Add more criteria](#) • [Advanced options](#) 



Finding Major Donors

- ▶ Review and sort in Excel – can add more calculations to track percentage increases year over year.

A	B	C	D	E
Sort Name	Primary Steward	Total 2015 Amount	Total 2016 Amount	Total 2017
Downey, Tim		\$ 1,000.00	\$ -	\$ -
McCann, Debbie	Molly Mangan	\$ 201.00	\$ -	\$ -
McCann, Deborah	Mary Osman	\$ 1.00	\$ -	\$ -
McCann, Mark		\$ 101.00	\$ -	\$ -
Meyer, Joan		\$ -	\$ -	\$ -
Miller, Carol		\$ -	\$ -	\$ -
Parker, Mary	Debbie McCann	\$ -	\$ -	\$ -
Parker, Susan		\$ -	\$ -	\$ -
) Peredes Pineda, Alejandra		\$ 100.00	\$ -	\$ -



Select Prospects

- ▶ Consider your organization's bandwidth. How many prospects can you manage?
- ▶ Set reasonable goals for the # of prospects and a \$ amount.
- ▶ Capture information about prospects
 - ▶ Readiness
 - ▶ Internal Priority
 - ▶ Likelihood of donation
 - ▶ Solicitor- Think about long term relationship building
 - ▶ Ask amount



Capture Prospect Research

► Use Notes with Prospect Research Note Type

McCann, Debbie > Add note

Add note

▼ Note Information

Note Type	Original Date
Prospect Research ▼	2017-02-22 📅

Note

Debbie appears to be really interested in our organization. She's attended every event we've had in the last 6 years and she's given increased gifts every year. We should definitely target her for a major gift. See attached Tribune article about her being the Philanthropist of the Year in 2016.

▼ File Attachments

Attach one or more files

📎 Attach a file

▼ Activity Sharing

Select any related constituents that should also display this activity (for reference purposes)

Mark and Deborah McCann (Spouse/Partner) W4Sight LLC (Employer)



Track additional data in LGL

► Distill research using built-in and custom fields

▼ Categories

Contact types

[Spouse/Partner](#)

Acknowledgment Preference

[Prefers mail](#)

Topic Areas

[Schools](#)

Capacity

[Low - Annual Giving up to \\$100](#)

Groups

[Staff People](#)

Communication Tags

[None defined](#)

Funding Organization Types

[None defined](#)

Interest

[High](#)

► Assign Steward

▼ Related Information

Relationships

[McCann, Mark](#) (Spouse/Partner)

[More...](#)

[W4Sight LLC](#) (Employer)

[More...](#)

[Edit relationships](#)

Class Years

[Student, 1987](#)

[Edit affiliations](#)

Stewards

[Nicole Hedges](#)

Membership

[General](#) : 1/16 to 1/18

[Edit membership](#)

Education info

[OPRFHS, 1987](#) [High School] - ,

[Edit schools](#)



Major Giving- Cultivation



Cultivation

- ▶ Create a Goal in LGL to track major gift target and interactions with the prospect

McCann, Debbie > \$100,000

[Edit goal](#)

Goal details

Goal name

FY16 Unrestricted Support

Constituent

[McCann, Debbie](#)

Status

MG: Cultivation

Complete/closed?

Category

Major Gift


Team Member/Owner

[Nicole Hedges](#)

Description


This should be a no-brainer for Debbie – she loves us.

Amounts

Ask/Goal \$100,000 
Projection \$25,000 to \$100,000

[+ Add gift](#)

Date

02-22-17 

Related Information

Campaign

[Annual Giving](#)

Fund

[General Operating](#)

Appeal

[Spring 2016](#)

Event

None defined



Cultivation

- ▶ Use RELATED TASKS on the Goal to set up reminders related specifically to this goal.

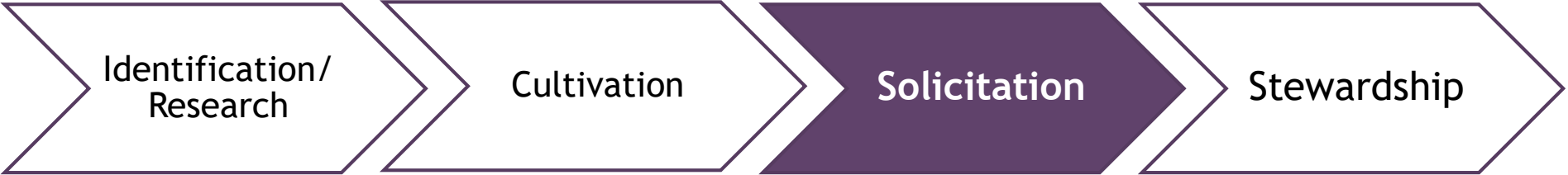
1 result

Constituent	Activity
McCann, Debbie dmccann@w4sight.com 53 W Jackson Blvd Ste 726 Chicago, IL 60604-3473 <i>ID: 956368</i>	Call <input type="checkbox"/> Invite Debbie to lunch Suggest going to a seafood place – that's her favorite. 0.0 hours spent 🕒

- ▶ When the task is complete, add a CONTACT REPORT to capture what happened and create follow-up tasks
- ▶ Enable Dropbox email integration to make it easy to capture email interactions with Constituents



Major Giving- Solicitation



Solicitation – the Ask

- ▶ Use a Contact Report to capture the ask results.
- ▶ If Declined, update the status and status date again.
- ▶ Link the resulting pledge or gift directly to the Goal.

New Gift

- Use values for next gift? [?](#)
- Use same constituent for next gift? [?](#)

Gift Information

Connect to an open pledge, goal or installment

[Goal] FY16 Unrestricted Support - \$100,000 : 02-22-17 -- General Operating ▼ Goal is complete?

Constituent

McCann, Debbie [✎](#)

ID: 956368

[Show recent gifts](#)

Gift type

Gift ▼

Category

Donation ▼

Amount

\$ Anonymous?

Tax deductible amount

\$

Payment type

-- choose one -- ▼



Major Giving-Stewardship



Stewardship

- ▶ If there is a gift, status automatically changes to Received.
- ▶ Continue to use related Tasks and Contact Reports to track ongoing interactions.
- ▶ Set up a new Goal when you start transitioning to thinking about the next ask.
 - ▶ Mark the old Goal as complete at this time – only need to have one active goal at a time unless cultivating multiple gifts from the same person

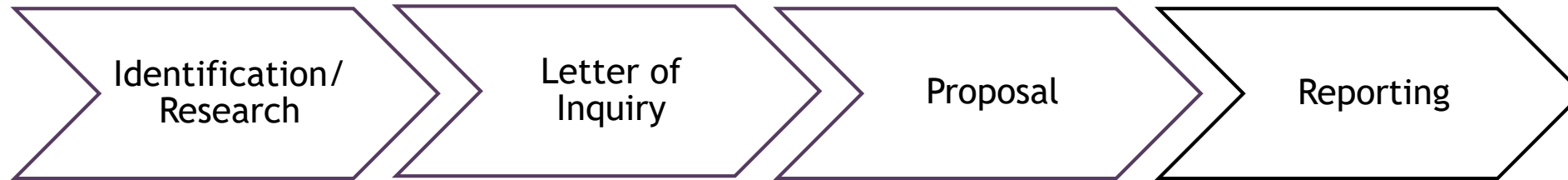


Track your work

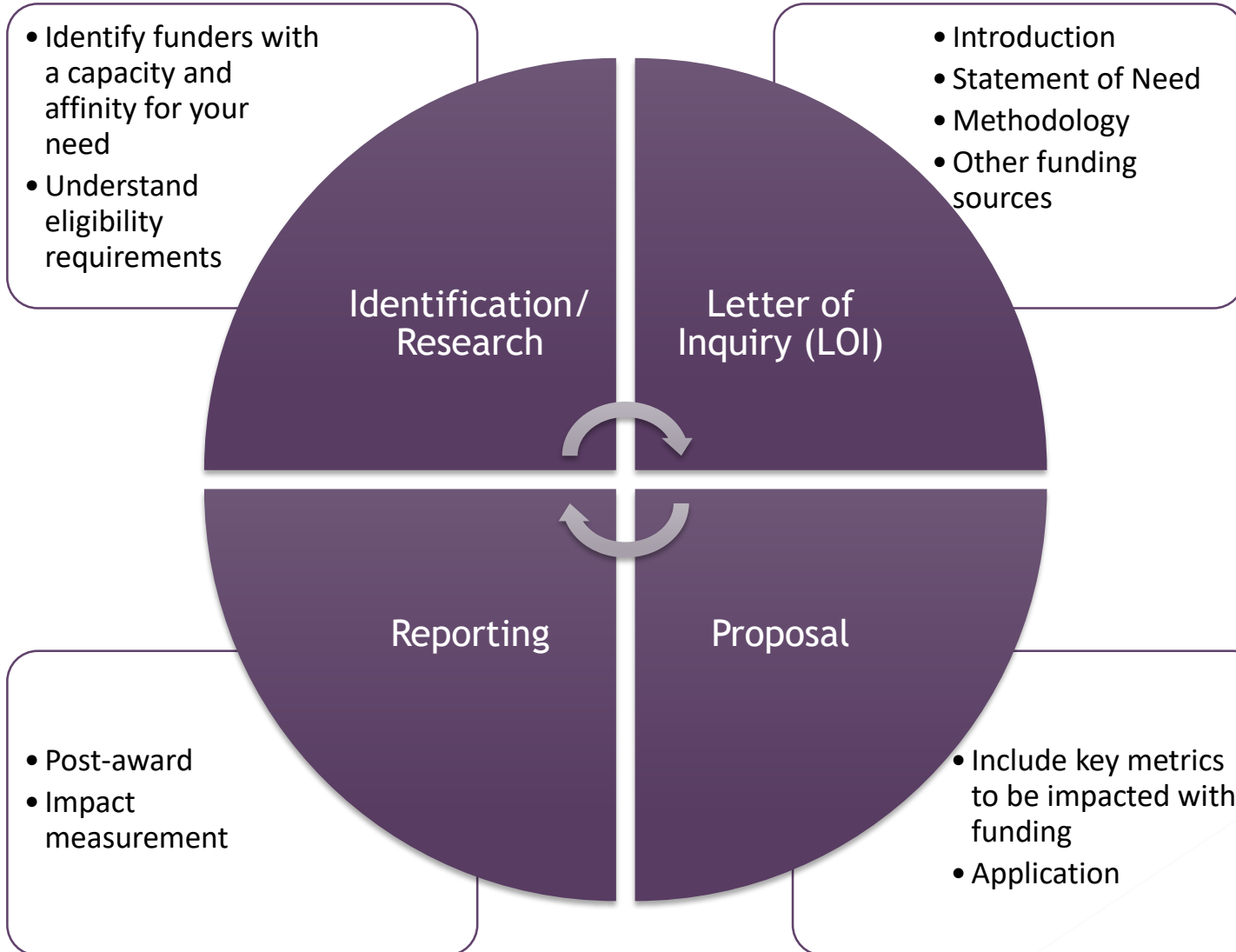
- ▶ Use Activity menu to see consolidated tasks and contact reports.
- ▶ Use Fundraising/Goals to see all goals across constituents.
- ▶ Use Dashboard Calendar to visualize what's due



Grant Management



Grant Management LifeCycle



Grants Management

- ▶ Create a Goal to represent each proposal
- ▶ Customize the Goal Status and Goal Category fields to reflect Grant values
- ▶ Use Related Tasks to log Proposal deadlines, and post-award reporting deadlines.
- ▶ Decide whether proposals and reports will be attached to Contact Reports once they are completed or stored in shared folders. Be consistent!



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Online Resources

- ▶ [www.w4sight.com\usergroups](http://www.w4sight.com/usergroups) - Request Assistance
- ▶ Create Smart Fields (for donor totals by year)
 - ▶ <http://help.littlegreenlight.com/article/129-reports-use-smart-fields-to-enhance-constituent-report-building-and-mailings>
- ▶ Use Goals to track Major Gifts and Grants
 - ▶ <http://help.littlegreenlight.com/article/101-add-fundraising-goals-for-major-gifts-or-grants>
- ▶ Track interactions with Constituents
 - ▶ Enable Email Integration: <http://help.littlegreenlight.com/article/174-create-contact-reports-by-sending-email-to-your-lgl-dropbox>
 - ▶ Tasks: <http://help.littlegreenlight.com/article/122-tasks>
 - ▶ Contact Reports: <http://help.littlegreenlight.com/article/121-contact-reports>



Online Resources - Continued

- ▶ Create pledges and track payments
 - ▶ <http://help.littlegreenlight.com/article/107-pledge-entry>
- ▶ Create acknowledgement letter templates and generate letters
 - ▶ Overview: <http://help.littlegreenlight.com/article/138-acknowledgments-general>
 - ▶ Create the template: <http://help.littlegreenlight.com/article/429-create-your-acknowledgment-template>



Online Resources - Continued

- ▶ Use LGL Forms to collect info on board member interactions with constituents
 - ▶ Set up board members as team members so that their names appear in the team member drop-down list even if they don't log into the database.
 - ▶ Create a nonpayment LGL form for board members to use to submit contact reports from a link in an email or on your website.
 - ▶ If this is something you'd like additional help with, please submit a request form through www.w4sight.com/usergroups

