

Major Giving/Grants

Salesforce

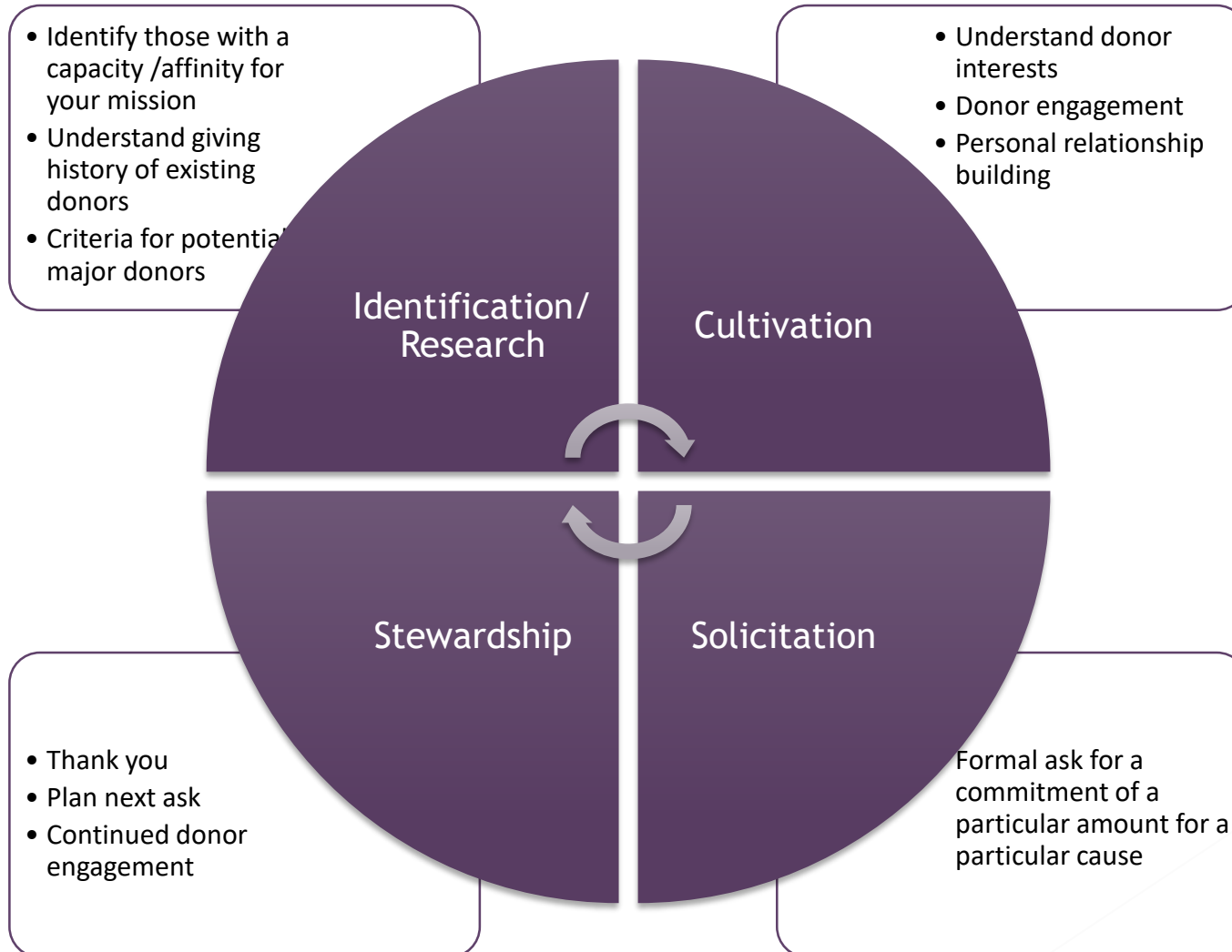
Agenda

- ▶ 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

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



Capture necessary data

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



Mine the Data

► Use standard and Custom reports

Account Name	Opportunity Name	Amount	Close Date	Opportunity Record Type	First Name	Last Name
<input type="checkbox"/> Account ID: 0014600002ncAe (1 record)						
		\$25.00 avg \$25.00 max \$25.00 min \$25.00				
Ozog Household	Nicole Ozog- Donation 2/22/2017	\$25.00	1/15/2015	Donation	Nicole	Ozog
<input type="checkbox"/> Account ID: 0014600002ncAj (1 record)						
		\$500.00 avg \$500.00 max \$500.00 min \$500.00				
Ardnt Household	Debbie Ardnt- Donation 2/22/2017	\$500.00	2/7/2016	Donation	Debbie	Ardnt
<input type="checkbox"/> Account ID: 0014600002ncAo (1 record)						
		\$5,000.00 avg \$5,000.00 max \$5,000.00 min \$5,000.00				
Smith Household	Jill Smith- Donation 2/22/2017	\$5,000.00	10/28/2015	Donation	Jill	Smith
<input type="checkbox"/> Account ID: 0014600002ncAt (1 record)						
		\$1,000.00 avg \$1,000.00 max \$1,000.00 min \$1,000.00				
Weller Household	Beca Weller- Donation 2/22/2017	\$1,000.00	7/7/2016	Donation	Beca	Weller
<input type="checkbox"/> Account ID: 0014600002ncAy (1 record)						
		\$10,000.00 avg \$10,000.00 max \$10,000.00 min \$10,000.00				
Sheets Household	Kate Sheets- Donation 2/22/2017	\$10,000.00	3/4/2016	Donation	Kate	Sheets
Grand Totals (5 records)						
		\$16,525.00 avg \$3,305.00 max \$10,000.00 min \$25.00				



Automate as much as possible

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

Assigned	Opportunity	Company / Account	Contact	Date ↑	Subject	Priority	Status	Task
Nicole Hedges		Smith Household	Jill Smith	2/22/2017	Personal Introduction	Normal	Not Started	<input checked="" type="checkbox"/>
Nicole Hedges	FY16 Major Gift	Hedges Household	Renee Hedges	3/1/2017	Site Visit	-	-	<input type="checkbox"/>
Nicole Hedges		Smith Household	Jill Smith	3/24/2017	Site Visit	Normal	Not Started	<input checked="" type="checkbox"/>
Nicole Hedges		Smith Household	Jill Smith	3/31/2017	Board Member Lunch Invite	Normal	Waiting on Dependent Task	<input checked="" type="checkbox"/>
Grand Totals (4 records)								



Major Giving- Cultivation



Cultivation

- ▶ Engage donors personally (not mass mailing)
 - ▶ Tie their gift to something meaningful to them
 - ▶ Donor Screening may give insightful information about their affinity to give
- ▶ Create a mindful plan (Moves Management will help)
 - ▶ How to capture the interactions between board members/executive staff's cultivation efforts.

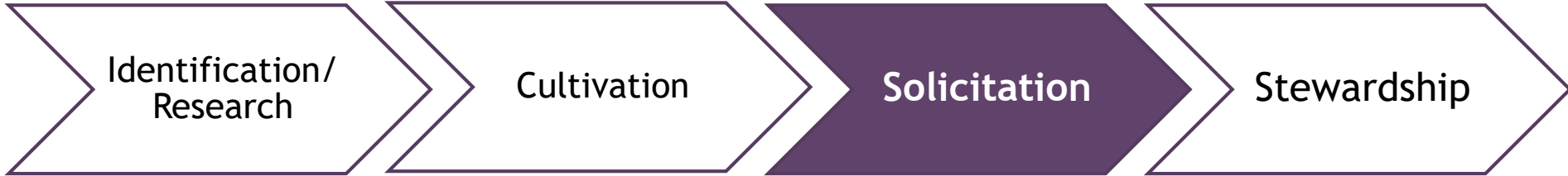


Cultivation

- ▶ Create activity records for every interaction with Major Donor/Prospects
- ▶ Activities
 - ▶ Phone calls, mailings, meetings, follow-up: Create institutional knowledge
 - ▶ Amount and date of ASK
 - ▶ Set reminders



Major Giving- Solicitation



Solicitation

- ▶ Document all pledges
 - ▶ Use a formal Pledge form
 - ▶ Assign a solicitor (Account Owner) at gift level
- ▶ Moves Management
 - ▶ Stage History
 - ▶ Link Major Gift Opportunities to Activities



Pledge Agreement Form

DONOR INFORMATION:

Name as you would like to be recognized: _____

Address: _____ City/State: _____ Zip: _____

Home #: _____ Work: _____ E-mail: _____

BUSINESS INFORMATION:

Name: _____ Title: _____

Address _____ Phone: _____ Extension: _____

City/State: _____ Zip: _____ Fax: _____

PLEDGE INFORMATION:

Please allocate my pledge of \$ to:

- Unrestricted
- President's Circle
- Endowed Fund (Name): _____
- Other (Name): _____

My gift will be matched by: _____ my employer my significant other's employer

Special instructions: _____

PAYMENT INFORMATION

The payment schedule I prefer is:

- annual payments of \$ to begin
- quarterly payments of \$ to begin
- monthly payments of \$ to begin
- Other:

My preferred method of payment is:

- Check made payable W4Sight
- shares of stock
- Payroll Deduction
- Credit Card payments are accepted online at W4Sight.com. Click Donate.

PLEDGE AUTHORIZATION:

Signature: _____ Date: _____



Major Giving-Stewardship



Stewardship

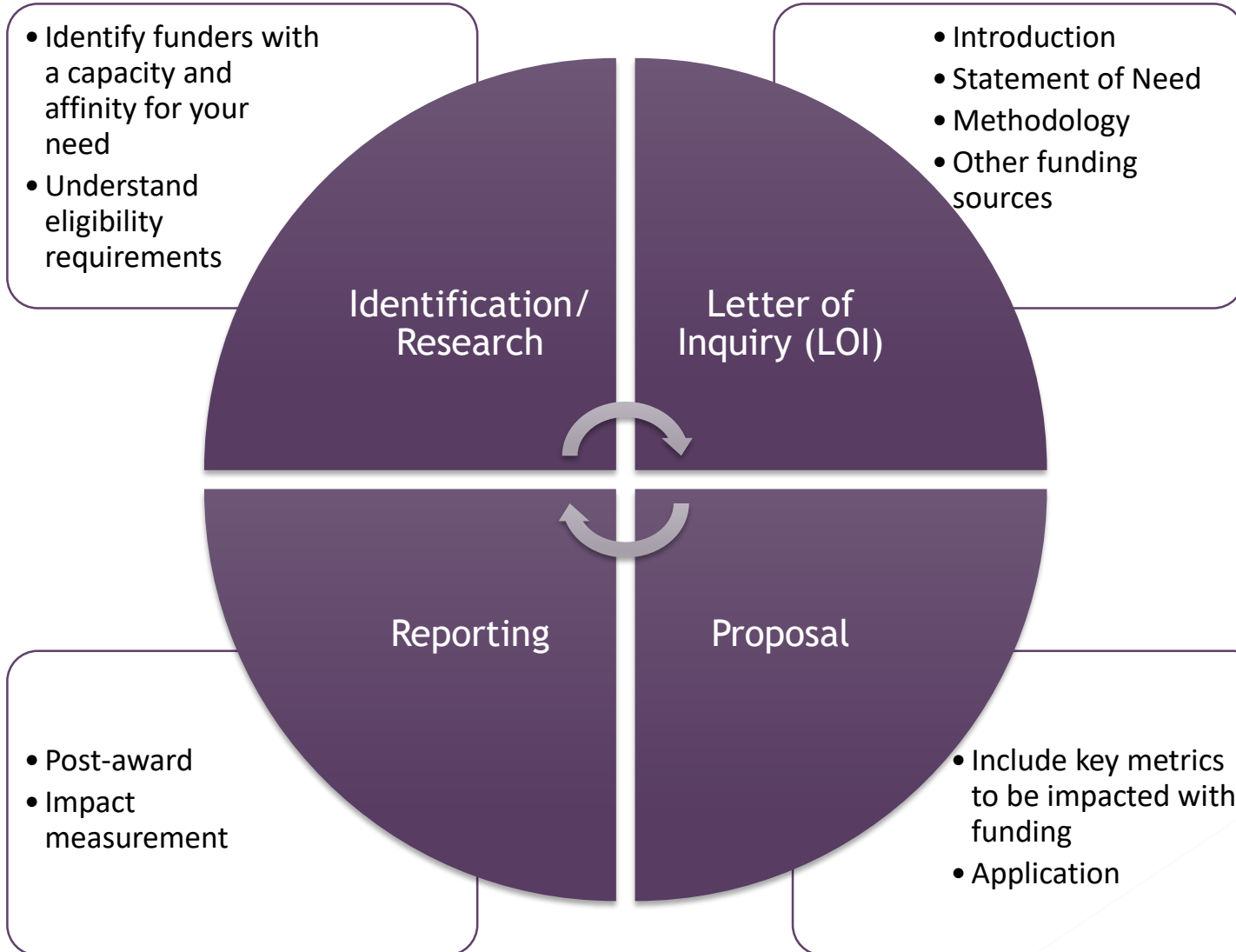
- ▶ Set Activities for Check-ins: Engagement Plans for interval follow-up (ie. every 6 months)
- ▶ Link payments to pledges. Pledges must be entered in a timely manner so they are available when payments come in.
- ▶ Discussion: When is it time to start a new Ask?



Grant Management



Grant Management LifeCycle



Grant Management

- ▶ Add [potential] Grantor as an Account
- ▶ Track Grant Status via Stage
- ▶ Link Opportunity to Pledge/Payment



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Online Resources

- ▶ [www.w4sight.com\usergroups](http://www.w4sight.com/usergroups)
 - ▶ Organizational Readiness Checklist
 - ▶ MG/Grants Quick Start Guide
 - ▶ Pledge Form Template
 - ▶ Assistance Request Form
- ▶ NPSP – General Information
 - ▶ <https://powerofus.force.com/articles/Resource/NPSP-Documentation>
 - ▶ <https://powerofus.force.com>
- ▶ NPSP - Upgrade
 - ▶ <https://powerofus.force.com/articles/Resource/Upgrade-to-NPSP3-from-a-Previous-Version-of-NPSP>
- ▶ Grant Management
 - ▶ <https://powerofus.force.com/articles/Resource/NPSP-Create-and-Manage-Grants>
- ▶ Engagement Plans
 - ▶ <https://powerofus.force.com/articles/Resource/NPSP-Create-and-Manage-Engagement-Plans>
- ▶ Trailhead (free On-Demand tutorials)
 - ▶ <https://trailhead.salesforce.com/>

