

# Welcome!

## Building a Major Donor Program



## Purpose & Intended Result

**Purpose:** To show how a Major Donor Program can help your camp have a breakthrough in fundraising, deeper donor engagement and more loyal funders.

**Intended Result is for you to understand:**

- ★ What is involved in building a Major Donor Program
- ★ What your next steps could be to get started

# Why a focus on a Major Donor Program?

Total Giving in United States in 2021  
\$484.9B

Individual Giving is \$326.9 B (living individuals) + \$46.0 B for charitable bequests = \$372.9 B **(77% of total giving)**

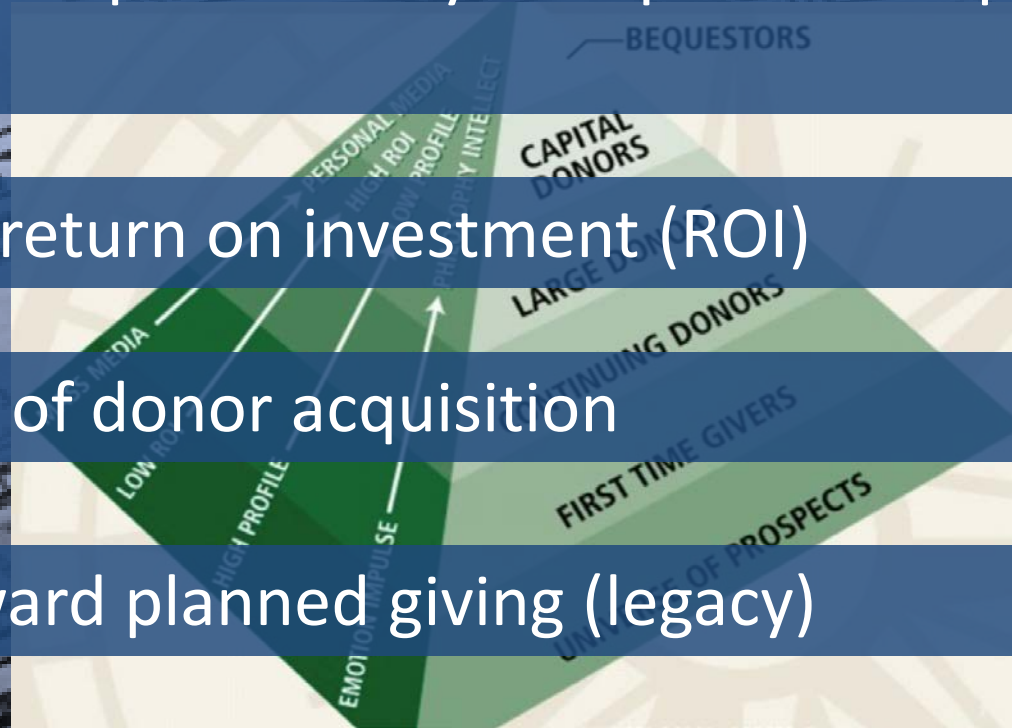
Foundations give \$90.9 B (18.7%)

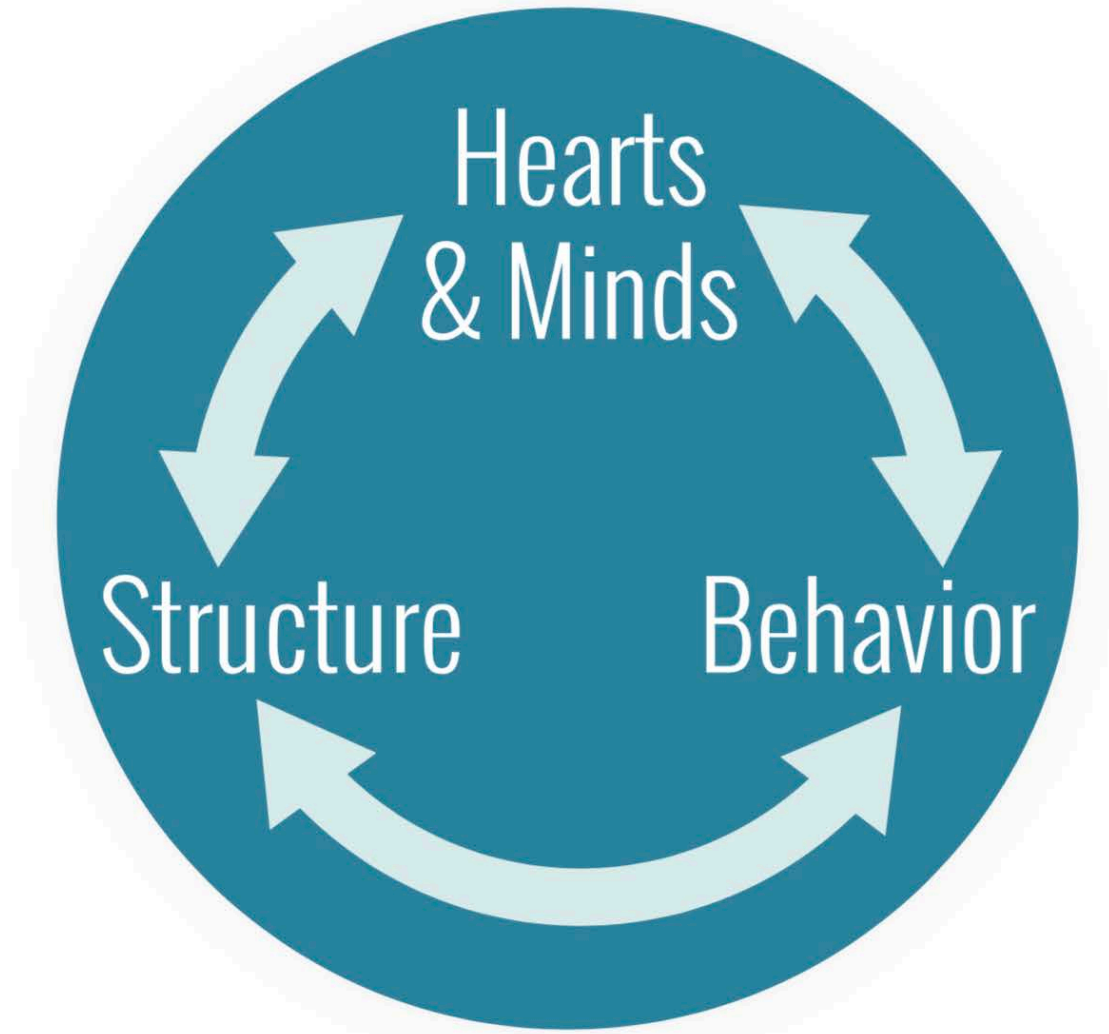
Corporations give \$21.1 B (4.3%)

Source: Giving USA 2022 Report on 2021

# Veritus Group suggests there are 5 Important Reasons you should have a Major Gift Program

1. It is a strategic and important function of fundraising
2. It gives your donors an important way to express their passion to your organization!
3. It develops a superior return on investment (ROI)
4. It offsets the poor ROI of donor acquisition
5. It is a natural path toward planned giving (legacy)







Credit: Robert Gass and the Social Transformation Project



# The 5 Points of Possibility to Build a Culture of Philanthropy



- 1 Culture of Philanthropy is integral to our mission

- 2 Everyone shares some responsibility for a Culture of Philanthropy

- 3 We build and maintain deep donor partnerships

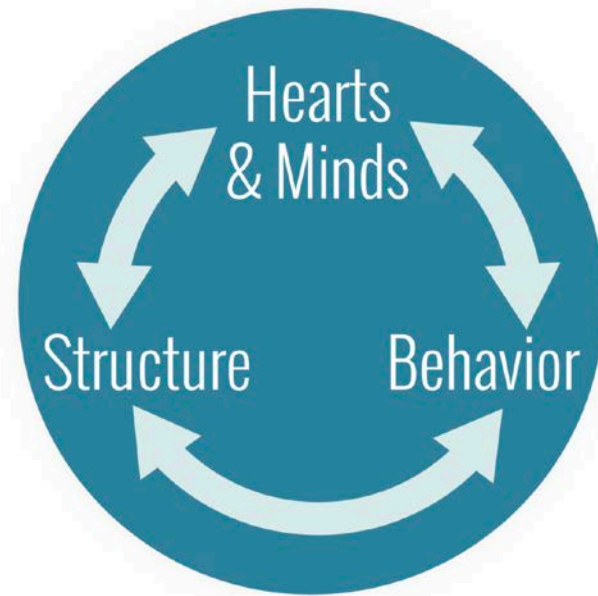
- 4 Community engagement is what we do

- 5 Every contribution of service, items or money is recognized as philanthropy

Inspired by 2017 Evelyn & Walter Haas Jr. Fund Report: Beyond Fundraising/What does it mean to Build a Culture of Philanthropy? by Cynthia M. Gibson

Why do I think its important to do this?

It changes everything.



Credit: Robert Gass and the Social Transformation Project



What are the challenges to building a Major Donor Program?



Photo by Darren DeLoach with Unsplash



Do you have the buy-in to  
prioritize it?

PASSION LED US HERE





**If you don't get  
buy-in for  
building a Major  
Donor Program, it  
will fail.**

# Who will take on a portfolio?



- Build a development team to take on portfolios. Find individuals who are good at building relationships....including...
  - Development Staff
  - Executive leaders
  - Board members
  - Program staff
- Help people decide how many people they can take on...

# What is Enrollment?

Moved

Inspired

Asked

Feel Free to Choose Yes,  
No, or Counter-Offer



SUNDAY

MONDAY

TUESDAY

WEDNES

THURS.

FRIDAY

SATURDAY

## Do the Math

### How to Determine the Size of Your Portfolio (or portfolios of your team)

- ★ How many hours can you devote to this?
- ★ A full time (40 hours/week) MGO portfolio = 150 donors
- ★ 20 hours/week = 75 donors

### How many in your Donor Pool to get a healthy (qualified) portfolio?

- ★ You need 3 donors for every one who will want to be engaged and be part of your portfolio
- ★ **Do not skip the step** of determining who the best candidates are for a healthy portfolio

5 PM

MT. TOM  
RUN

RUN  
ASHLEY

	SUNDAY	MONDAY	TUESDAY	WEDNES.	THURS.	FRIDAY	SATURDAY
6 AM		SWIM	BIKE/SPIN	SWIM		SWIM	
9 AM						PLAN	long run
NOON		Major Donor Work				NING	
			open client time			open client time	
5 PM	MT. TOM RUN				RUN ASHLEY		

Major Donor Work





**Not every donor wants to relate to you!**

**Only 1 in 3 donors are *interested* in relating to you!**

**You need to uncover those who *want* to relate to you.**

A hand holding a pocket watch with dragonflies in the background. The watch is the central focus, with its face showing Roman numerals and hands. The background is a soft, textured grey with two dragonflies, one on the left and one on the right, appearing to fly around the watch. The overall tone is muted and professional.

**You only have so much time!**

**Focus on Donors with the MOST POTENTIAL**

**How much time do you really have? How many hours per week?**

**AVOID distractions!**

**No Prospecting!!**



The background of the slide is a dense, overlapping pattern of US dollar bills, including \$50 and \$100 denominations, rendered in a light, semi-transparent grey color. The bills are scattered across the entire frame, creating a textured, financial backdrop.

**Be a wise steward of the money invested in you**

**There is a Return on Investment (ROI) *for you.***

**Focus on that which will get the biggest bang!**

**“A” donors should get the majority of your MD time**

**Do not spend too much time in the office – once you determine who should be in your portfolio, go meet with them!**

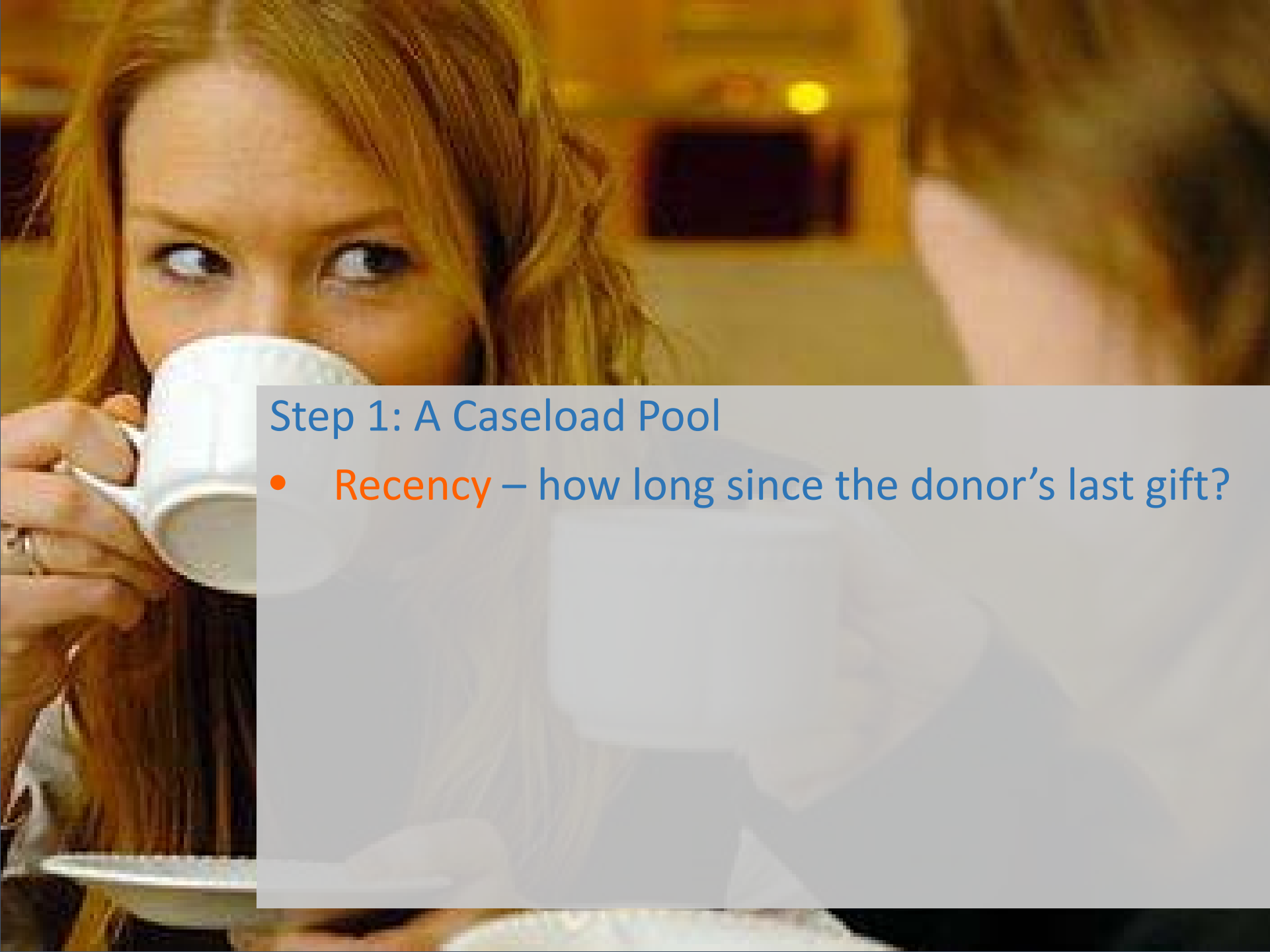


## The Objectives of Discovery Meetings:

- To have **meaningful connections** with your best donors.
- To find out **if they want to connect with you** and if so, how.
- To find out **what they have in abundance** that they might like to share with you...

## Step 1: A Caseload Pool





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- **Recency** – how long since the donor's last gift?






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- **Recency** – how long since the donor's last gift?
- **Gift Amount** – how much do they give, cumulatively each year?
  - Add up 4 years for each donor. Does it equal a major donor?
  - You may want to separate capital gifts, or other unique one-time gifts.



## Step 1: A Caseload Pool

- **Recency** – how long since the donor's last gift?
- **Gift Amount** – how much do they give, cumulatively each year?
- **Capacity** – history of giving to other organizations, conversations you've had with the donor, or perform a wealth overlay



## Step 1: Determine Your Caseload Pool

- **Recency** – how long since the donor's last gift?
- **Gift Amount** – how much do they give, cumulatively each year?
- **Capacity** – history of giving to other organizations, conversations you've had with the donor, or perform a wealth overlay
- **Relationship** – who has been managing the donor? How connected are they?



# Veritus Group Metrics

- Total Dollars Raised
- # of Meaningful Conversations
- # of Stewardship Calls
- # of Asks
- Working the Plan for Each Caseload Donor
- How Did Each Donor Perform from Year to Year?

# Choose Your Tool

	A	B	C	D	E	F	J	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	
1	Fundraising Totals						\$0	\$0	\$0	\$0		\$0	\$0	\$0	Other Income	TOTAL Income							
2	Total Dono 0									Avg. Gift	#DIV/0!	% To Goal	#DIV/0!		\$0	\$0							
3																							
4	Tier	ID #	Donor Type	First Name	Last Name/ Org. Name	Organization Contact Name	Lifetime Gift Sum	Giving Total FY 2013	Giving Total FY 2014	Giving Total FY 2015	YTD Giving FY 2016	Goal 2017	YTD/Goal Difference	2014/2015 Variance	Largest Gift	Typical Giving Month	Wealth Engine Rating	Donor Interest	Contact Preference	Highest Level of Contact	Notes / Background	>>>FY 2017 >	
5													\$ -	\$ -									>>>FY 2017 >
6													\$ -	\$ -									>>>FY 2017 >
7													\$ -	\$ -									>>>FY 2017 >
8													\$ -	\$ -									>>>FY 2017 >
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19													\$ -	\$ -									>>>FY 2017 >

## The Veritus Group Marketing Impact Chart

Major Donor Tracking Form ...

Smartsheet.com, Inc. (US) | https://app.smartsheet.com/b/home

Ob-La-Di, Ob-La-... Apple - One to One Most Visited Getting Started Latest Headlines Apple News Harbrooke Grou... NYT > NYTimes... The Axe Files wit...

				Do... ID	Donor Name	Recency of donors last gift	Amount Previously Given Last 5 years	Capacity	Relationship	Donor Type	Donor Address	City	S...	Zip C...	Total Giving 2012	Total Giving 2013	Total Giving 2014	Total Giving 2015	Total Giving 2016	
2																				
3					<b>A Prospects</b>															
4				12345	Horace Shackley	0-3 month	\$4,560.00	10,000 - 25,000	4 - Good Relation	1 - Indiv	15 Riversi	New Yor	NY	100€	\$500.00	\$360.00	\$1,100.00	\$900.00	\$1,700.	
5				13592	John Jacobs Smii	3-6 month	\$39,950.00	50,000 - 100,000	3 - Fair Relationsl	1 - Indiv	2325 Bosl	Somersv	MA	1054	\$7,500.00	\$450.00	\$6,000.00	\$12,000.00	\$14,000.	
6				8735	Sally Fenderson	6-12 mont	\$42,400.00	10,000 - 25,000	2 - Minimal Relati	1 - Indiv	1500 Allig	Gainesvi	FL	8764	\$10,000.00	\$10,000.00	\$10,000.00	\$400.00	\$12,000.	
7				7093	Jennifer Mosley	3-6 month	\$6,800.00	1000 - 10,000	4 - Good Relation	1 - Indiv	70 Hill Vie	San Frar	CA	900€	\$1,500.00	\$800.00	\$1,000.00	\$1,800.00	\$1,700.	
8				1357	Ralph Finley	6-12 mont	\$2,311.00	25,000 - 50,000	4 - Good Relation	1 - Indiv	Frog Ponc	Atlanta	GA	4857	\$0.00	\$0.00	\$500.00	\$786.00	\$1,025.	
9				9665	Grace Chu	3-6 month	\$36,575.00	25,000 - 50,000	5 - Excellent Rela	1 - Indiv	1534 2nd	Milwauk€	WI	763C	\$75.00	\$500.00	\$2,000.00	\$16,000.00	\$18,000.	
10																				
11					<b>B Prospects</b>															
12				74789	Missy Smith	More than	\$2,560.00	10,000 - 25,000	5 - Excellent Rela	1 - Indiv	13 Maple	Seattle	WA	878€	\$360.00	\$400.00	\$700.00	\$600.00	\$500.	
13				1932	Rachel Schwartz	3-6 month	\$1,120.00	1000 - 10,000	4 - Good Relation	1 - Indiv	7 Bridgetc	Washing	DC	453€	\$80.00	\$180.00	\$360.00	\$500.00	\$0.	
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## Smart Sheet as a Tool to Track your Major Gifts Portfolio

# CHOOSE ABUNDANCE by LAURIE HERRICK

HOME BOOK HUB CHOOSE ABUNDANCE INTENSIVE SPEAKER BOOKINGS RAINMAKER CONSULTING CONTACT

## Examples - Graphic Impact Reports & Charts

The image displays two white rectangular cards with rounded corners, each containing a resource for download. The left card features the Rainmaker logo (RM) in a blue circle at the top left. Below it, the title "Major Donor Portfolio Instructions" is centered. The main body of the card contains several paragraphs of text, including sections titled "Creating a Major Donor Portfolio" and "Elements of the Major Donor Portfolio Spreadsheet". At the bottom of the card, the word "DOWNLOAD" is written in white capital letters inside a green rounded rectangle. The right card features a large green icon of a document with a white grid pattern, representing a spreadsheet, centered at the top. Below the icon, the title "Major Donor Portfolio Tracker" is centered. At the bottom of the card, the word "DOWNLOAD" is written in white capital letters inside a green rounded rectangle.

Rainmaker Downloads  
rainmkr.com



Start Discovery meetings to determine who is interested in engagement.

Use Discovery Meetings to Discover what people have in abundance (interests, ideas, resources, etc.) and if/how they want to play.

Create POOL of donors

# LIFE CYCLE OF A MAJOR DONOR

Bring Marketing and Mass Communications into Plan, if that is appropriate for the donor.

Use Info from Meeting to create a customized plan

Set a Goal and establish strategies and custom steps

Clean up data and segment

Work the Plan

Bring Marketing and Mass Communications into Plan, if that is appropriate for the donor.

## **REFLECTION TIME: 3 minutes**

- 1. Who could you have a Discovery Meeting with?**
- 2. What questions would you ask to get in touch with their favorite ways to volunteer, spend their time, and help camp?**
- 3. What questions would you ask to find out what their favorite aspects of camp are?**
- 4. What are ways that you could steward them?**



## **Breakout – Paired Share**

**What is one thing that you have taken away from this workshop that you will take on?**

**Who could you enroll in being part of your major donor team?**

**Who will you have a discovery meeting with?**





“Until one is committed, there is hesitancy, the chance to draw back, always ineffectiveness. Concerning all acts of initiative and creation, there is one elementary truth the ignorance of which kills countless ideas and splendid plans: that the moment one definitely commits oneself, then providence moves too.

All sorts of things occur to help one that would never otherwise have occurred. A whole stream of events issues from the decision, raising in one's favor all manner of unforeseen incidents, meetings and material assistance which no man could have dreamed would have come his way.

Whatever you can do or dream you can, begin it. Boldness has genius, power and magic in it. Begin it now.”

**William Hutchinson Murray**