

THE EPISCOPAL NETWORK FOR STEWARDSHIP
helping people live generously

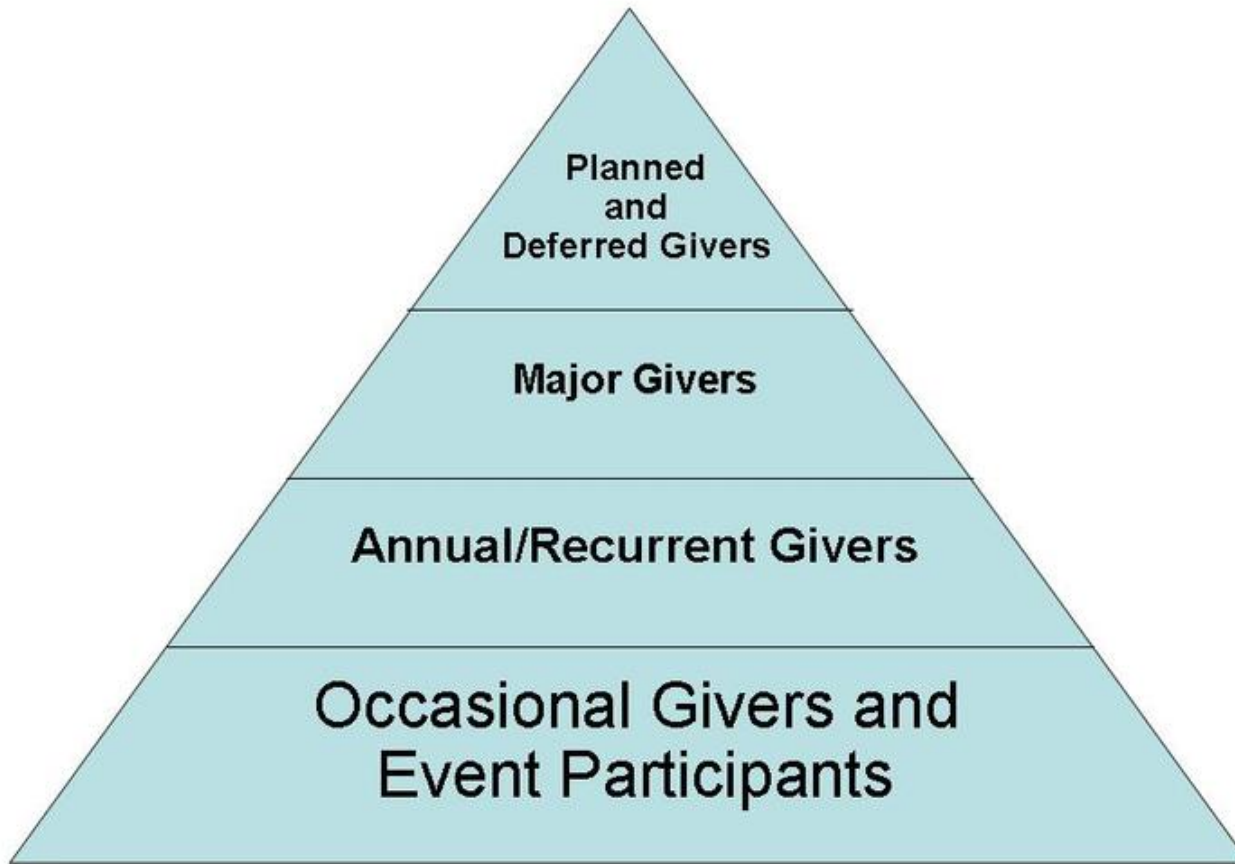


transforming  *generosity*

Developing Major Gifts

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Sample Giving Pyramid



Major Gift Fund Raising is Important

- Securing Major Gifts grows church's programs.
- Major Gifts grow donor commitment.
- Major Gifts strengthen financial underpinnings of parish.
- Successful Major Gift Fund Raising improves Cost of Fund Raising ratio.



Successful Major Gift

Fundraising:

- Requires involvement of Rector and Chief Development/Stewardship officer.
- Demands additional emphasis on upgrading donors.
- Requires development of special communication programs to major donors.



Motivation

- **Donor Participation**

Invite people to participate in the mission and make an impact in their own community by using their financial resources.

- **Financial**

Develop funds to strengthen, support, and grow the mission and ministry of your church.

- **Environmental**

A strong base of committed donors inspires others to be generous.



Before you get started:

- Be sure your Vestry members are committed major donors.
- You, your rector, and other members of the Leadership Team must be major donors, as well.
- Set exciting goals for major donor fundraising.
- Develop a powerful case statement.



Your Vestry

- Must be major donors.
- Your organization must be one of each vestry members top three charities.
- For vestries, church must be the top donation.
- Must be willing to assist in major donor fund raising as:
 - Advisors
 - Connectors
 - Solicitors



Setting Goals

- Analyze your constituency for potential and interests.
- Define this effort as a one-time campaign or on-going support.
- Set inspiring but attainable goals.
 - Number of gifts.
 - Amount of income.
 - Amount of upgrades



Goals (continued)

- Determine type of income
 - Immediate gifts
 - Pledges—monthly, annual, multi-year
 - Planned Gifts



Case Statement(s)

- Overview Case Statement
 - Brief history of organization
 - What are you doing now
 - What are your challenges
 - What are your opportunities
 - How much money is necessary to meet challenges and take advantage of opportunities
 - What are giving and naming opportunities for donors
 - **INSPIRE AND MOTIVATE!!!**



Case Statement(s)

- Individual
 - History of Relationship with Organization
 - Outline Interests of the Donor
 - Identify the Opportunity(ies) specific for this donor
 - Highlight the Opportunity you want the donor to focus on
 - Explain the difference the donor's support will make for realizing the opportunity
 - Ask for a specific amount



Making the Ask

CAUTION

It is important to remember that the donor's giving history and pattern will dictate different gift strategies...it will not ALWAYS consist of five and six figure gifts!

Goal is to raise the bar from where it is to a higher level.

Evolution not revolution!



Making the Ask

- Determine the target ask amount.
- Decide on the type of ask.
- Build the case for support.
- Prepare to make the ask.
- Identify the crucial objections or concerns.
- Specify what needs to be done to facilitate a gift or pledge commitment.



Making the Ask

- Keys to Remember
 - Check your attitude.
 - Listening vs. telling.
 - Irrelevant vs. donor-relevant.
 - **#1 reason gifts aren't made; people don't ask.**



Making the Ask

- Summarize the experience to date.
- Talk about why you are excited about this opportunity and why you are giving.
- Make the ask—be specific.
- ***Shut up and listen.***
- Handle possible objections.
- Summarize and gain agreement on next step.