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Support Raising
Leaders Conference
2023



 via

Essentials for Any Major Gift Program

Aaron Bear

Mission Aviation Fellowship



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Help bring the love of Christ to isolated people

People living in isolation are cut off from the outside world, with little to no access to health care, education, supplies, and the hope of the gospel. Our airplanes are the only way many people living in remote jungles, deserts, and mountains have access to life-giving necessities and the love of Christ. You can help us—and the hundreds of churches, missionaries, and organizations we serve—bring help, hope, and healing to the ends of the earth.



Introductions:

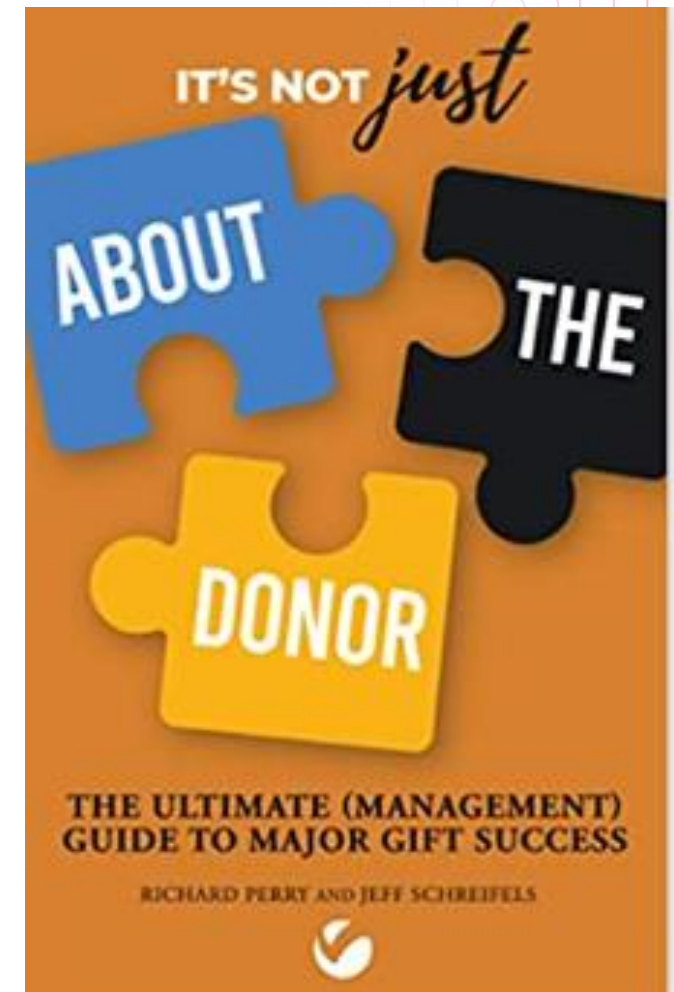
- Name
- What organization you are with and how long have you been there?
- What is the current state of your major gift program?

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Giving Credit Where Credit is Due!



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Essentials for Any Major Gift Program

“**Fundraising** is proclaiming what we believe in such a way that we offer other people an opportunity to participate with us in our vision and mission.”

- Henri Nouwen, A Spirituality of Fundraising



**NOW
YOU
ARE**

THE BODY OF CHRIST

**AND EACH
ONE OF
YOU IS A
PART OF IT**

1 CORINTHIANS 12:27

Essentials for Any Major Gift Program

In our nonprofits, there are those who are on the front lines delivering the **solution** (program staff), those who are **supporting** the effort (finance, HR, marketing, etc...) and those who are providing the **resources** (including prayer) to make it happen (investors).

Essentials for Any Major Gift Program

- Deuteronomy 8:11-20
- 1 Timothy 6:17-19

Essentials for Any Major Gift Program

Major gift fundraising is a **one-to-one** relationship where your sole aim is to match an investor's **interests** and **passions** to the goals of the organization.

Essentials for Any Major Gift Program

A strong major gift program does two things:

- It provides the much-needed **net revenue** for your organization's programs. Most likely it will provide the highest return on investment over time.
- It creates a place for some of the investors that you have worked hard to acquire and cultivate to fully express how they can **change the world** through your mission.

Essential #1: Create the Right Environment for Major Gifts

- A culture of **philanthropy** exists that supports relationship building with investors
- **Leadership** recognizes that major gifts are not the same as direct mail, marketing, public relations, or other various functions in fundraising
- **Silos** between all fundraising, marketing, and communication functions are minimized or eliminated
- Backend administrative **processes** are in order

Activity:
**Assessing Your Culture of
Philanthropy**

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Essential #2: Hire a Quality Major Gift Officer

- They **believe** in your cause
- People-oriented
- Desires to be **out meeting** with investors more than being in the **office**
- Great **communication** skills
- Knows how to handle **rejection**
- Understands the need for and accepts **accountability**
- Enjoys getting **results**
- Team player
- **Spiritually** mature

Essential #3: Select the Right Investors for a Caseload

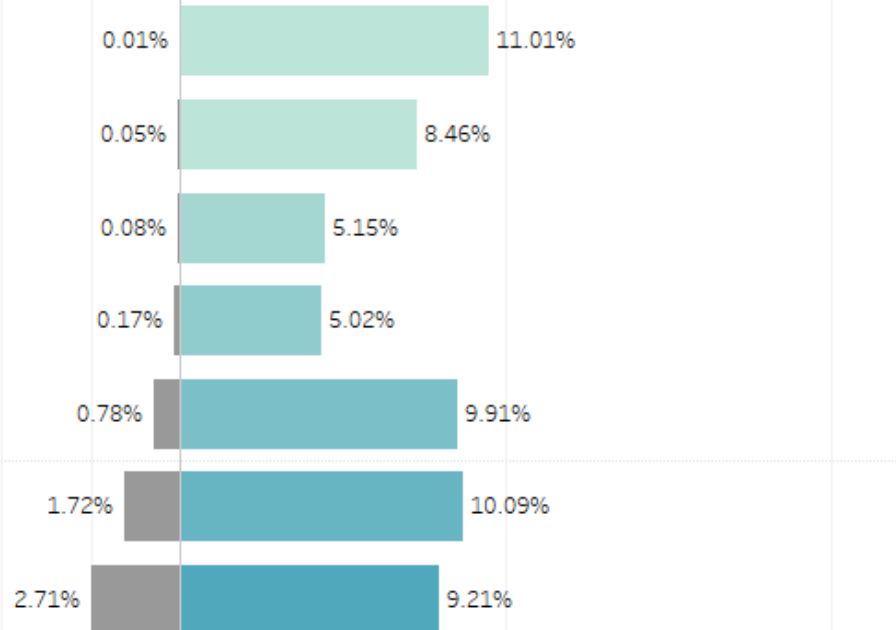
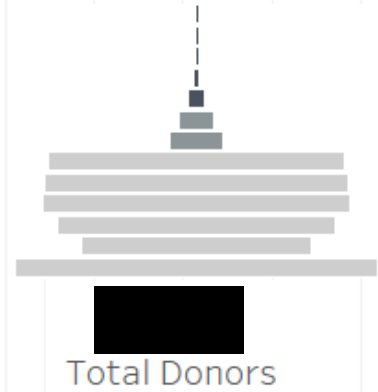
- Your data needs to be clean
- Understand who is already giving and how much they are giving

Annual Giving History Distribution

Calendar Year

Gift Campaign

(All)



\$101-\$250

\$51-\$100

Less than \$51

Total Given

Donor_Count

Total_Given

Essential #3: Select the Right Investors for a Caseload

- Your data needs to be **clean**
- **Understand** who is already giving and how much they are giving
- Use wealth research and data append tools
- Look for **inclination** and **capacity**, but favor **inclination**
- **Qualify** investors for a caseload

Question:

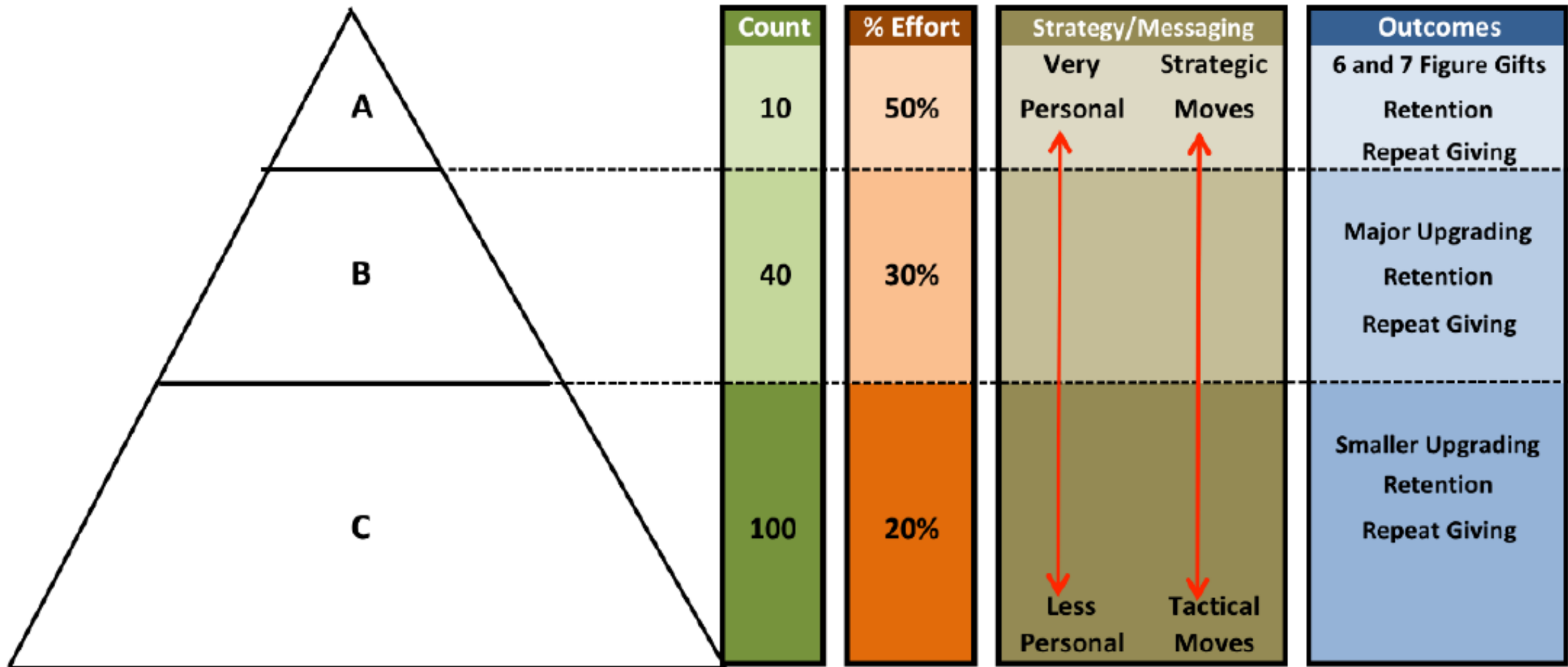
What steps would you take to qualify investors for a caseload?

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Essential #4: Caseload Management

- Caseload of **150** investors
- Use the CRM to assign the relationship
- Split caseload into **A, B, and C tiers**

CASELOAD MIX



Essential #4: Caseload Management

- Caseload of **150** investors
- Use the CRM to assign the relationship
- Split caseload into **A, B, and C tiers**
- Set **goals** and **make a plan** for every investor
- Have a gift **crediting** policy
- **Reevaluate** the caseload annually
- Keep good **records**

Essential #5: Cultivation Strategies and Moves Management

- Deliver effective communications in a manner the investor prefers
- Seek to get **face-to-face** interaction
- Understand the investor's **passions** and **interests**
- Have **compelling** offers or cases for support
- Practice **permission-based** asking
- **Negotiate** the details of the gift
- Thank the investor **appropriately** and **timely**
- Provide **impact** reports

Essential #5: Cultivation Strategies and Moves Management

- Create **opportunities** for building relationships:
 - Events
 - Vision trips
 - Trips of interest
 - Dedications
 - Special gatherings with leadership

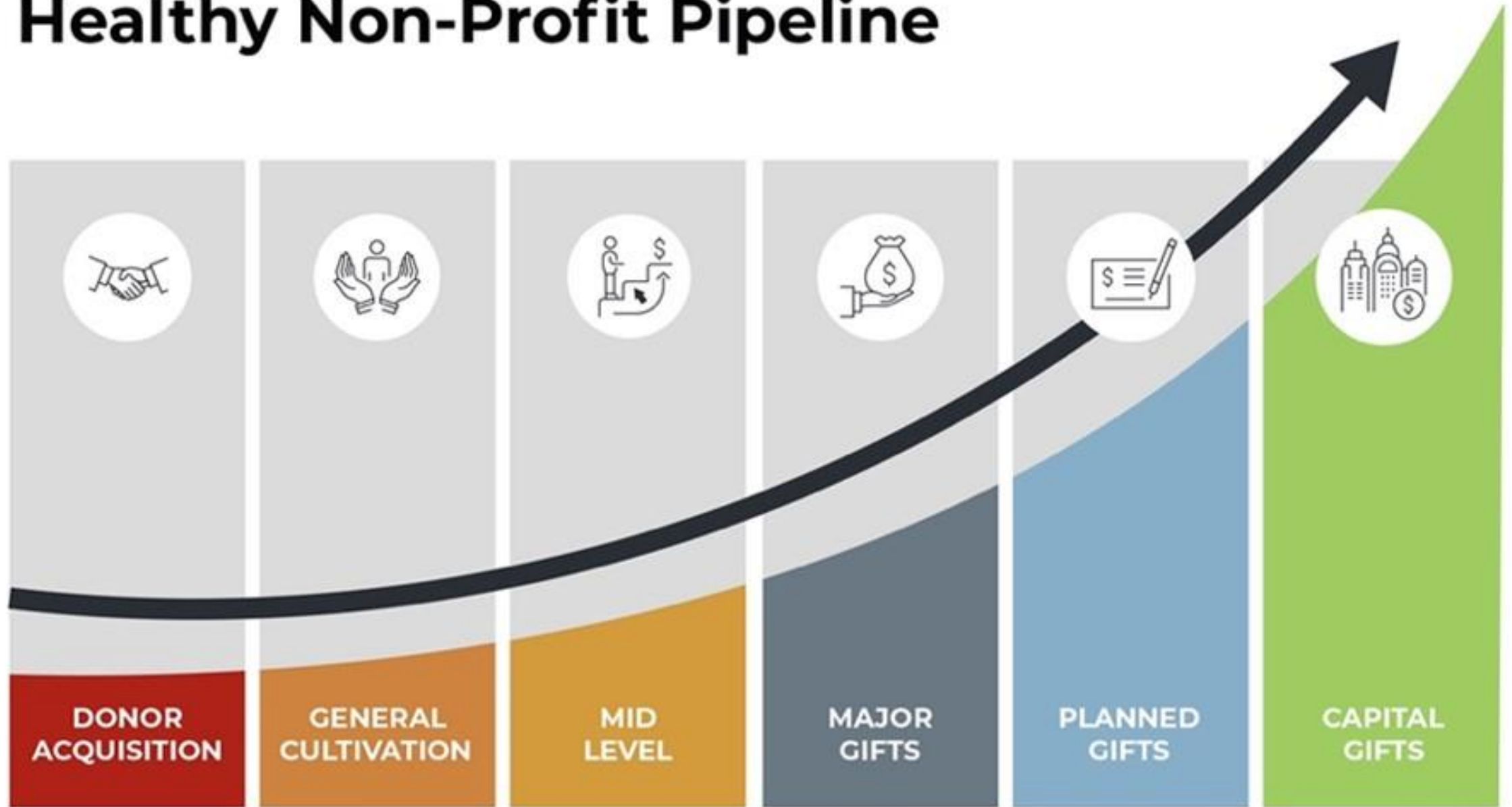
Essential #6: Accountability and Reporting

- Ensure the MGO is working the **plan** for each investor
- Review how the same investors are performing from **year to year**
- Review how the investors are performing against the **goal**
- Monitor # of **meaningful** connections made, and # of **asks**
- Evaluate the total dollars raised
- Observe how the **MGO** is performing generally – attitude, passion, responsiveness

Essential #7: Keep the Pipeline for Major Gifts Full

- Major gift officers can waste precious time by **prospecting** for new investors
- Leverage the **relationships** of your **Board** and existing major investors
- Invest in other areas of **Development** to grow your support base

Healthy Non-Profit Pipeline



Myths About Starting a Major Gift Program

- It's easy to start a major gift program
- A major gift program delivers great economic value its first year
- Major gift success is not quantifiable
- Only MGO's need to be involved with the investor
- A MGO can handle a large caseload of investors
- This money would have come in even if the MGO hadn't been there

Myths About Starting a Major Gift Program

- You don't need to give a MGO benchmarks or tell them they are doing a good job; they should know they are
- Major gifts should focus on the wealthy
- Our investors are different
- Investors don't have a specific interest
- There is a formula that works for every investor
- A MGO can't ask for more because the investor has always given that amount

Myths About Starting a Major Gift Program

- A MGO must get face-to-face with every investor
- A MGO must ask for a gift on every visit
- Major gifts hurt direct mail and events

Questions for me?

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Question for you:

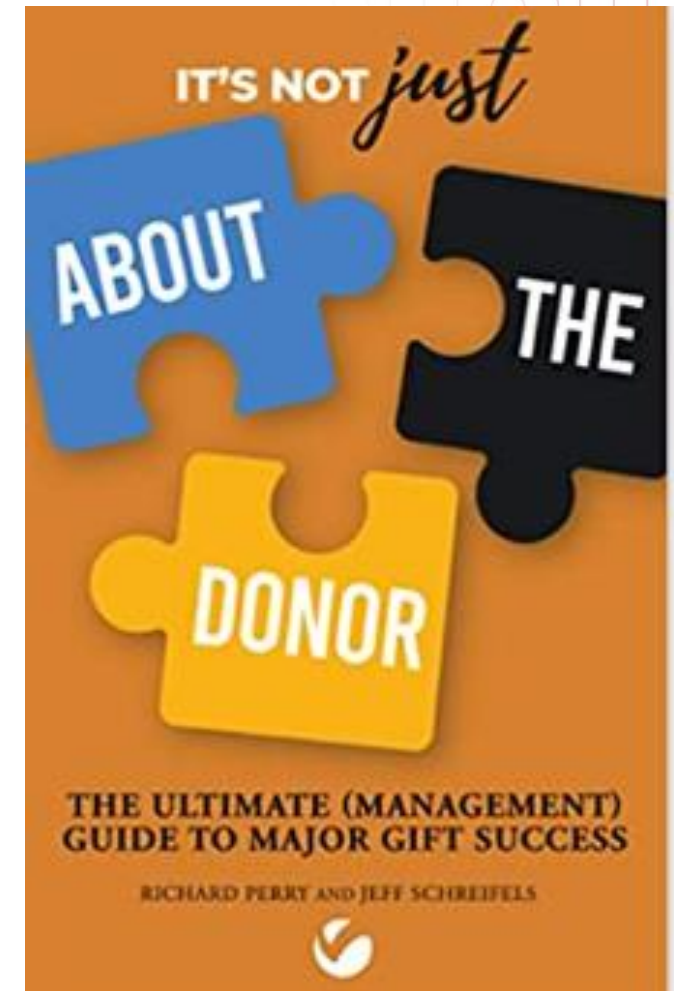
What are three action items I will implement after participating in this workshop?

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We Want Your Feedback!

1. Open SRLC app
2. Click on the “survey” button on the home screen
3. Choose “workshop” from the list of surveys
4. Select **this** workshop in the drop-down menu