

## Major Gifts - Fundraising

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# History of Fundraising

- **Fundraising (seventies)– development (eighties and nineties) – advancement (today)**
- **Plays a critical role in achieving key institutional objectives**
- **Moves us from where we are to where we want to be**

# Old think v New think

- **“Old think” was that you held periodic, intensive, “big bang” appeals with minimal activity between campaigns. These were part time and amateurish.**
- **“New think” is that fundraising is a continuous, sustainable program integrating marketing, public relations and fundraising.**

# Old think v New think

- **“Old think” was that fundraising was for projects of opportunity or extras**
- **“New think” is that funds are raised for priorities critical to the institutional mission as defined by institutional planning**

## Old think v New think

- **“Old think” was to take the money and run**
- **“New think” is that we are forging life long relationships built through personalisation and stewardship**

## Old think v New think

- **“Old think” was that fundraising programs were run by fundraising staff alone. Volunteers advised but did nothing much.**
- **“New think” is that the team of Board, volunteer appeal leaders, CEO, staff and the development professionals combine to fundraise effectively**

# Old think v New think

- **“Old think” was that you staffed fundraising with short term budgetary considerations. You pretended that someone else would give and someone else would ask.**
- **“New think” is that we emphasise long term investment to build a permanent team and culture with the help of champions**

# TOTAL DEVELOPMENT

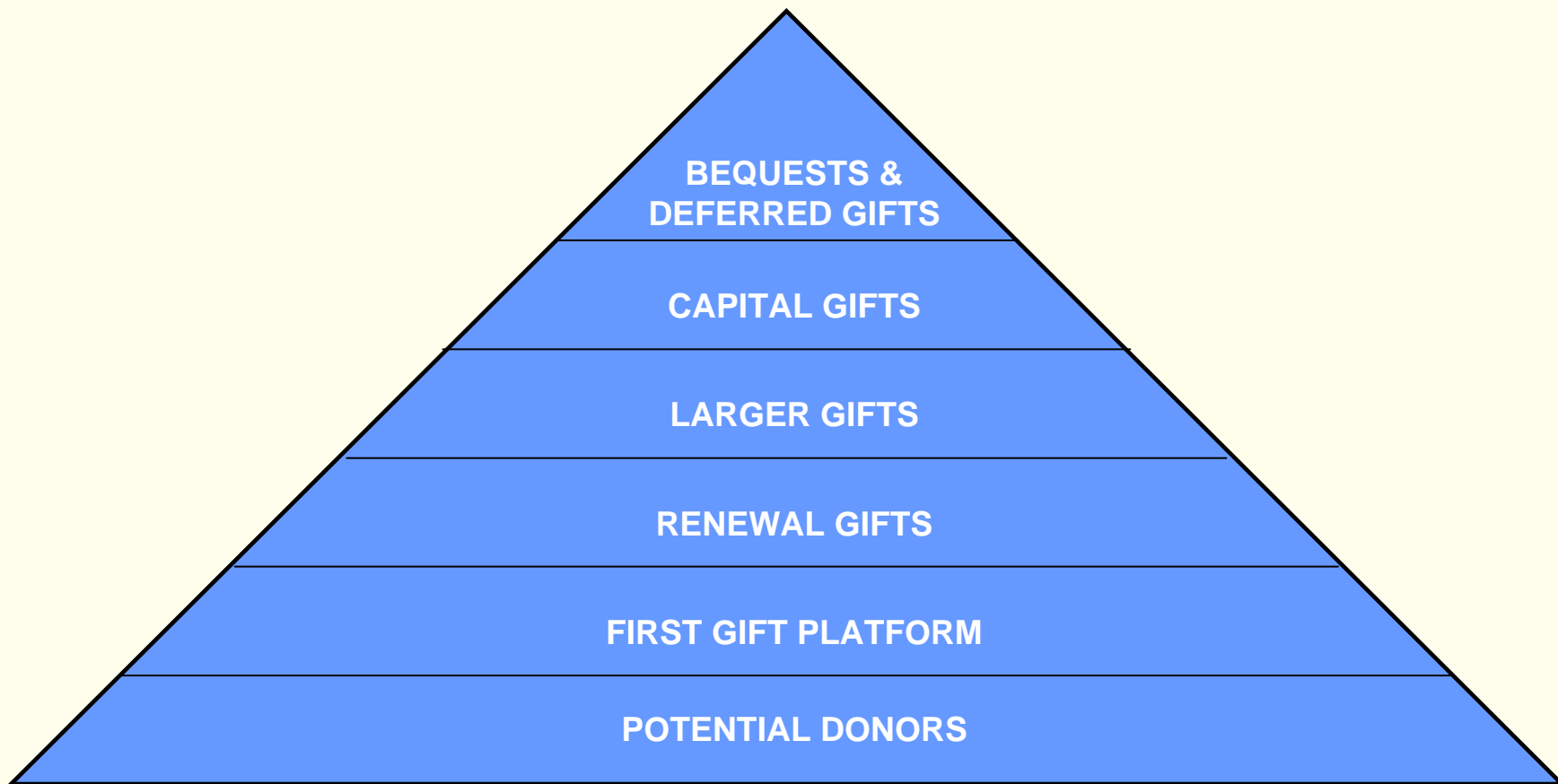
*The modern integrated fundraising approach for optimum returns*



# Three types of Funds

- **Budget or Recurrent – small annual gifts from as many donors as possible**
- **Capital or Non-recurrent – major gifts and pledges from very few donors**
- **Endowment – mainly from Bequests or other planned gifts**

# THE DONOR PYRAMID



# Supported By

- **Budget from the Board**
- **The active participation and interest of Board members, CEO and staff**
- **Development staff**
- **The involvement of “Champions”**
- **Public Relations support**
- **Culture of positive attitudes and enthusiasm**

# THE ANATOMY OF A MAJOR GIFTS PROGRAM

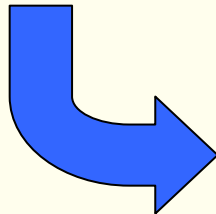
***“People giving to People to  
achieve Great Things”***

# The Major Gift Plan

## STAGE 1

### **PREPARATION**

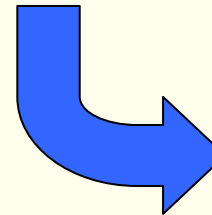
- **CASE**
- **LISTS**
- **LEADERS**
- **PLAN**



## STAGE 2

### **CAMPAIGN PHASE**

- **TRAIN TEAM**
- **KEY GIFT FUNCTIONS**
- **ASK**
- **THANK**



## STAGE 3

### **FOLLOW ON**

- **RECORD**
- **REMIND**
- **THANK**
- **PR**

# The Role of the CEO

- **Is the inspiration for Major Donors... “they feel the CEO has the vision”.**
- **Must be present at the negotiation**
- **Must thank and nurture**
- **Should be spending significant time on fundraising at the major gifts level**
- **Is a key to success.**

# The Feasibility Study

- **Recommended to properly assess the potential and make the appropriate recommendations.**
- **Includes many interviews with those leading the client organisation and with likely donors**
- **Must be done by outside objective people (consultants).**

## Facts to Note

- **Individuals give the majority of Major Gifts.**
- **Spread subscriptions raise more**
- **Prospects want to know exactly what the money is for**
- **Personal asking is vital**
- **Tax advantages and designated gifts encourage larger gifts**
- **Avoiding all of the above invites a low gift**



# MAJOR DONORS ARE DIFFERENT

***So you must treat them  
differently... they expect it.***

## Major Donors...

- **Don't read your mail (their PA does that)**
- **Expect you to come to them**
- **Expect the attention of your CEO and Chairman**
- **Will expect you to run a good business**
- **Will expect to know what you will do with their gift**
- **Will become a stakeholder**

# Corporate “Home” Truths

- **Corporate Social Responsibility largely a myth**
- **Must create WIN/WIN situations**
- **Must research the corporate goals**
- **Must know the Corporate products and customers**
- **Must make reasonable matches with the cause**

# CONCLUSION

***“Things we must remember”***

# Key factors for Success

- **Respect for the Institution**
- **A clear commitment to fundraising by the Governing Body**
- **A clear vision and case for fundraising support**
- **Leaders who will give and get**
- **Prospective Donors with the capacity to meet the financial goals (your major gifts campaign is won or lost with the top ten donors).**

# The X Factor

- **Greater success driven by the big picture**
- **“If it is going to happen anywhere it will happen here” – uniqueness**
- **Larger goals seen in “bite sized chunks” inspires the volunteers and donors**
- **“What’s in it for me?” is still asked.**

# INSPIRED

FIA's 34<sup>th</sup> International Fundraising Conference  
 MELBOURNE CONVENTION & EXHIBITION CENTRE  
 24 - 27 February 2011



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