Grassroots Fundraising Journal

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GIFT
Grassroots Institute for Fundraising Training

DEMYSTIFYING
MAJOR DONOR FUNDRAISING

Contents

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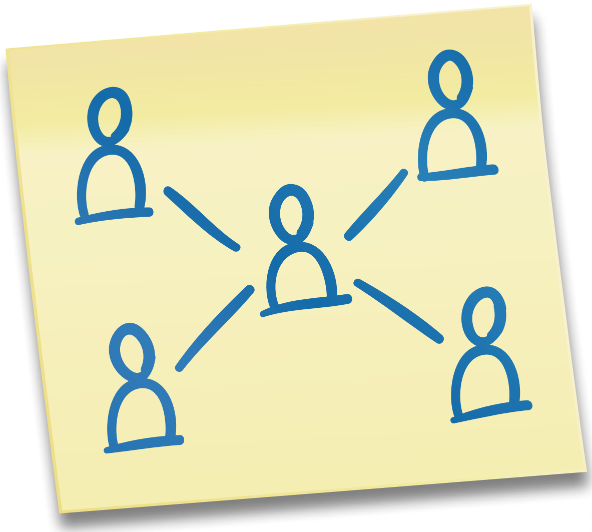
On Our Cover

Amnesty International (AI) staff and volunteers at the opening gala and the world premiere of Howard Zinn's "The People Speak" for the 2009 Atlanta Film Festival. AI hosted the opening reception for the event, and several AI donors and prospects were in attendance. Will Cordery (far right), senior major gifts officer for the Southern region of Amnesty International USA, shares his experience raising major gifts in this issue.

FEATURE



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The Missing Piece...

By Priscilla Hung

WE ARE JUST COMING OFF A HIGH, fueled by the great people who took part in our conference last month, Money for Our Movements 2010: A Social Justice Fundraising Conference. Thank you to everyone who volunteered, sponsored, attended, presented, and donated – all important contributions to making this third biennial conference an inspiring experience.

The high was also fueled by being able to put on a national conference in the midst of an economic recession. In addition to all the planning and outreach, we set a goal of raising $100,000 to meet conference expenses (registration fees cover less than half the cost). In the end, we raised a respectable $80,000 through a mix of generous social justice funders, individual donors, fundraising consultants, and small businesses and organizations.

While we're happy with the results and thankful for the generosity of our community, I won't lie and say it wasn't hard. I kept thinking, "If I could just find two or three major, major donors, my fundraising stress would be gone." As you gear up for end-of-year fundraising (already!), I won't be surprised if a few of you echo that sentiment.

This issue of the Journal is about demystifying major donor fundraising, however your organization defines who is a "major" donor. It is also about reminding ourselves that we can—and should—raise money from major gifts. We take the tools used by large organizations raising money from wealthy individuals—including prospect research, wealth screening, and moves management—and bring them to the grassroots level, scaling them to fit within our capacity and scope. Along the way, we remind ourselves that, like all fundraising, major gifts fundraising is about people and the relationships we create with them.

First in this issue, Kevin Johnson shows us how organizations can use the concept of moves management to provide personalized attention to major donors in a systematic—and very human—way. Next, Barbara Pierce introduces us to key web-based resources that can help supplement what we know about our donors. Will Cordery explains what he's learned about the similarities between raising major gifts for both small and large groups. Andy Robinson and Harvey McKinnon provide some key questions to ask after you've secured the gift. And Beth Raps offers insights she has applied to grassroots fundraising from someone who raises money from the super-wealthy.

Keep in mind, as always, that major donor fundraising is most successful when the other pieces of your fundraising program are solid. As a current subscriber, you have access to more than 250 articles in our online archives—free. Take advantage of this trove of information to read up on other topics you need. If are not yet a subscriber, you can become one today at grassrootsfundraising.org.

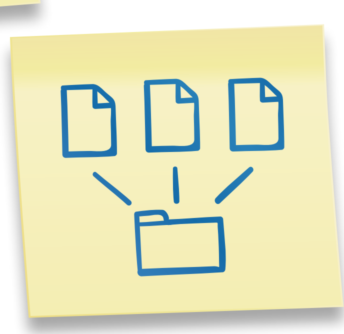
Good luck raising major money this fall!

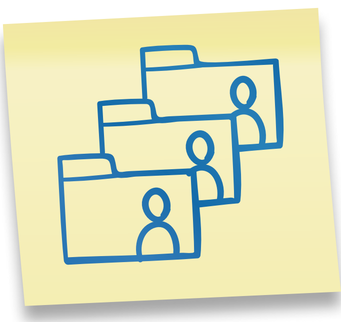
Priscilla

The cost of publishing the *Journal* is covered solely by subscriptions and donations made by people like you. Please help us continue this great resource! Subscribe, renew, or make a donation today at grassrootsfundraising.org or call us toll-free: 888-458-8588 x304. Thank you!

Nurturing Relationships for Today and Years to Come

by Kevin Johnson





GOOD FUNDRAISING IS ABOUT GOOD RELATIONSHIPS. Board members and nonprofit staff often refer to donors as personal friends. But how many "good" friends can you actually have?

Donors report that communication quality and depth of relationship between them and the nonprofit are primary drivers for making gifts—both annual fund and legacy gifts (bequests). Donor research consistently reports that personalized and face-to-face interaction generates more in the way of gifts and resources for nonprofits.

But what if your brain is already filled up with the details of personal relationships? How many more can you add?

Researcher Robin Dunbar suggests the most friends your brain can handle might be around 150 because of the way the human brain is hardwired (see liv.ac.uk/researchintelligence/issue17/brainteaser.html). Other research suggests the number of close or best friends may be far smaller. Therein lies the rub. How do you stay "friends" with the dozens, perhaps hundreds, of people who value the work of your organization? Technology can help a little, but the root of the problem persists.

This is not a new problem in the fundraising world. Faced with this very dilemma, in the early 1970s G.T. "Buck" Smith devised a conceptual solution you can use in your small or mid-size nonprofit today and that will serve you as your nonprofit grows.

While driving the back roads of Ohio to visit donors, Buck realized he could only track a small number of relationships in his head; after that number he needed some help. Buck approached his work with an emphasis on the quality of the relationship—especially the fact that no manipulation of the prospect or donor is ever intended. Instead, he focused on

HOW DO YOU STAY "FRIENDS" WITH THE DOZENS, PERHAPS HUNDREDS, OF PEOPLE WHO VALUE THE WORK OF YOUR ORGANIZATION? TECHNOLOGY CAN HELP A LITTLE, BUT THE ROOT OF THE PROBLEM PERSISTS.

nurturing a passion within an individual to make a difference in a cause with the potential to bring joy and satisfaction to that individual. He envisioned a way to enable him to significantly expand his ability to cultivate and nurture greater numbers of donors who have the ability to make important contributions. Of course, "important" is relative, and what counts is what is "important" to your group—whatever the size of your nonprofit.

If you are just starting with this approach, I suggest trying it out with your top 5% or 10% of donors first or perhaps the top 50 or 100 people who are most important to the group. You might define "most important" by selecting people who have made the largest one-time gifts, people who have given the largest amount cumulatively over time, or a combination of both factors.

In the years since Buck Smith developed this process for managing donor relationships, now often called moves management, it has been modified and institutionalized (in fact, the term "Moves Management" is a registered trademark of the Institute for Charitable Giving in Chicago).

Over the last few years, I experimented with the concept of relationship management with a number of small and mid-size groups with the intent of discovering what would best serve smaller groups. What I discovered and observed worked is based on five simple questions. There's also one question to ask yourself in advance: Can I do this?

Here's a quick test for success. When was the last time you emailed a friend or family member a picture (subject line: "Pix!")? Or perhaps you sent a short note telling them what you were up to, or you came across an article, blog post, or website you thought they might like? If you have ever done such things, you can probably make this relationship management process work for you and your nonprofit.

In each instance, there is evidence that you listened, paid attention in earlier conversations, and have a sense of what could be of interest to your friend or relative. You remembered their interest at the right time and then made a small but thoughtful response. Such simple mindfulness is the essence of effective relationship management. This is not the same as tweeting or posting something on Facebook, in which you broadcast a single message to a range of different people. Rather, success will require a focus on what interests and engages others; these interests may or may not be of equal interest to you personally. In contrast, on Facebook most people post things that are all about themselves—"Look what I just did!"

Start with Your Interests, then Shift to the Donor's Interests

The simplicity of relationship management as originally envisioned is to help you discover people who might be interested in what you do and how to help them discover if they are, in fact, interested. If there is interest, together you and the prospective donor discover how best to be connected in a meaningful way. Out of that connection comes increased involvement on the part of the donor.

In my experience it's at this point that prospective donors end up asking you to ask them for a gift, by saying something simple such as, "How can I help?" Of course, by then you understand more about their interests and capacity, and you can respond intelligently to their request in a way that results in a gift everyone can be pleased and proud about.

By the way, once you secure a gift, you can start the process all over again. The same questions and process, as described below, still apply. Think of it as a circle going around, often asking for a larger gift in the next round.

Many people can manage this process intuitively with a number of individuals. However, how can you systematically nurture, involve, and connect with a growing number of supporters? In obtaining gifts of all sizes, in particular larger gifts, nonprofit fundraisers must pay attention to how each relationship unfolds.

It takes time and attention. In my experience, using a relationship management process as a tool to manage how you relate with donors consistently adds to the joy of fundraising you experience representing the work of your nonprofit; it also enables you to get results with larger numbers of people.

Five Steps: Five Simple Questions

Five questions that you ask yourself can form the basis of your relationship management system. These questions can be used in multiple ways: in donor meetings (slightly reworded), as a way to categorize groups of donors and their relative status so you can track overall progress, and to help frame the right perspective on designing informational and solicitation materials. The questions focus on the following steps in building a relationship:

1. Discovering a likely interest combined with capacity to make a gift
2. Deepening understanding
3. Nurturing involvement
4. Inviting a gift
5. Recognizing the gift, then beginning the process anew

Some groups condense the following set of five questions to four, others expand it to six. It rarely works well with fewer than four steps because too many distinctions get lost.

Here are the five steps that form the basis of this relationship management system and the questions that you ask yourself for each one:

1. **Introduce.** Does this person have the financial capacity to make a gift and is there an existing connection or likely interest in supporting the work of our nonprofit?
2. **Understand.** Have we personally introduced or discussed our work with the prospect? Often we think this has been done, but it has not. Use this conversation to figure out what they need and how they would like to be involved.
3. **Involve.** What must occur or be understood by the prospect in order for them to make a major gift? Most often the donor wants to find out more and the best way to do that is to become involved in some way with the work of the organization. For example, a number of attorneys have told me that they don't want to offer legal services, but instead want to become involved

Moving Through the Five Steps: One Development Director's Experience

What happened with the donor: The development director's experience	Notes on discovery and next steps
1. Introduce. "The wife of one of our volunteers brought up the name of the owner of the company she worked for because she had heard him talk in the office about the land and conservation. She volunteered to talk with him about coming out on a hike. He said yes. From the little bit of research we did on his company, we knew that he could make a large gift."	☐ Review lists of donors and supporters. Who knows whom? ☐ Prioritize based on what you know about each one. ☐ For each one, what is the best way to discover the answer about whether they have interest in your work and have the capacity to make a gift. ☐ In this case, the business owner had a successful business, hence likely capacity. He also talked positively about the issues involved. Asking him out on a hike will give everyone a chance to find out if his interests in conservation apply to the work of this group.
2. Understand. "Along the hike he told us some stories about growing up in the countryside. I was surprised because he seemed like such an urban person. He told us about hunting trips with his grandfather. Realizing that family was really important to him, we suggested that he invite some of his family on our next trip. We were able to include them all in a hike. He was so pleased he could share that outdoors experience with his children."	☐ What stood out in the conversation on the hike was the emotion that came through a story the donor told. We asked a follow-up question about his family and whether he spent time with them outdoors. ☐ After everyone had left, the director of development jotted down a few notes about each person related to the question of what must be understood and made notes about what's next and why. In this case: "He has capacity through his business. He believes it is important that people—especially children—experience the land firsthand. In May, invite prospect to June hike, ask him to bring family." Back in the office she entered the data into the database, set a tickler reminder for the date, and changed his category from "1 – Introduce" to "2 – Understand." The focus of the next interaction will be to find out how he might like to get more involved.
3. Involve. "We noticed he started asking questions about our finances and the audit. I made a point of asking the executive director to call him in response. Even though I could have called with the same information, I wanted the two of them to talk on the phone to get a better sense of each other. They ended up hitting it off well, with the prospect having some experience that applied to one of the management problems the executive director was wrestling with. The prospect was glad to help with advice. Our executive director later reported back to the prospect on how the advice was used."	☐ Involvement takes many forms. It does not have to be elaborate. In some cases, donors considering much larger gifts will require more involvement. Asking for advice on a simple problem is one of the easiest and most straightforward ways of soliciting involvement. For example, all it might take is something like this: "I know you have done this kind of work in your business, I need your help. I was wondering what advice you might have as we consider this ….?" ☐ The director kept a short list of "thank you to-dos" and took a moment to write a thank you note: "Thank you for your comment. It was really helpful to me in making the decision. As a result …" To make sure such notes go out, he schedules a half-hour each Tuesday morning to write letters.

4. Invite. "We asked to have a business meeting with the prospective donor. We intentionally requested a meeting at his place of business because that reflected the approach he would respect. Based on the comments he had made about the kinds of groups he supported, his interests, and need for businesslike accountability, we were prepared with a letter requesting a gift. The letter was short and to the point — just like his style. He reflected for a moment and then said yes."	☐ Using insight gleaned from earlier conversations, it was time to make a short written proposal to the donor. We write these proposals from the point of view of answering questions a donor would naturally have and change the introduction and occasionally the closing to make each letter unique in terms of the donor's experience.
5. Recognize. "The day we got the check, the executive director called the donor to thank him and I wrote him a note. I also forwarded the information to our board chair and asked her to give him a call to tell him what a difference the gift made. We responded right away because we wanted to demonstrate that we could handle the details well — which we had learned was the basis of his business success. Because we had talked about how his gift would be used, I can now report back to him regularly on our progress. I intend to use the next report to 'introduce' us to him again and to start the process over again on the way to his next and, I hope bigger, gift."	☐ About reporting back: If you have written one letter reporting on your work, you have written most. In other words, once you have the substance of a report letter, you can use it over and over, personalizing and updating it for each donor or group of donors. ☐ Schedule reporting letters or small group gatherings to report on recent work; some do conference calls or podcasts as well. ☐ Now that a gift is complete, begin the process over again. Use the same questions — there is always more to know. Some threshold questions have likely been answered. But as a donor considers increasing a gift, new kinds of questions often arise. You will have to address them successfully in order to get a larger or repeat gift.

with the service an organization provides, such as delivering meals to seniors or reading to children in the schools. Looked at from the perspective of the donor, then, what kind of involvement will help them complete this statement: "Now that I know (or understand) that ____________, I feel comfortable and confident in making a gift."

4. **Invite.** Have we made the case for a gift in a way that connects with the prospective donor's highest interests and values? (Or, Do we understand how the prospect would best like to make a gift, for what purpose, and in what gift range?)
5. **Recognize.** How will we most effectively—in the experience of the donor—recognize this gift?

The following chart shows how one development director of a local conservation advocacy group described his journey with a particular donor, with notations about each stage or question.

Keeping Track

You can create a simple spreadsheet to track your progress with each prospective donor (see the example on next page). At the top you could label a series of columns with the primary contact name, current status, next steps, and notes sections. Use the questions as the basis for creating your strategy for what is next.

I have noticed it is useful to write in complete sentences about the purpose of the next step as a way to provide guidance for how a meeting or contact might unfold. For example, a task described as "meet the executive director for breakfast" might be an appropriate strategy—but only if you have clearly thought it through. A more considered description might look like this: "Step 3: Mary the prospect starts her days early and has breakfast meetings most days at her favorite spot. She has also been asking some pointed questions about our budget. The executive director should ask to meet her for breakfast with the purpose of discovering what questions she needs to have answered in order for her to consider a major gift."

Using the Questions

These questions can be used to guide individual visits with donors, do internal tracking, or help project future fundraising resource needs.

Guide Individual Visits with Donors

Seeking the answer to a question could be the focus of a donor visit. Too often when we think about fundraising we think about asking. Asking for a gift is critical, but if we take the time to connect and involve the donor, the process will be more rewarding and the gift will likely be much higher, and repeatable. For example, what might a visit look like if your primary

Simple Mechanics to Track Prospects and Next Steps

Simplified and Proven "Moves Management" Methods

	Target Gift Amount	Moves Status	Volunteer/Partner	Staff	Most Recent Contact	Next Move	Notes
Top 10 Prospects							
Next 20 Prospects							
Future 30 Prospects							

Focus on the largest, most likely gift prospects FIRST.

Right now, how would we categorize the prospective donor in terms of our relationship with him/her?

Who is responsible? Include both staff and volunteers.

What must occur to move the prospective donor forward? What must the h/she learn, discover, or decide in order to make (or move closer to making) the maximum gift based on their true capacity and philanthropic potential?

goal was to discover the answer to the question, "What must occur or be understood by the prospect in order to make a major gift?" Finding an answer to a question could also be the assignment of board members to discover, for example at an event the prospective donor is expected to attend. In some cases, it might even be appropriate to ask that question directly of the donor.

Do Internal Tracking

You can use these questions to help plan individual donor contact as well as contact with groups of donors. Aggregating your individual information, you can track groups of donors and gain insight into your overall fundraising progress. Understanding the quantity of prospects at each stage in your gift pipeline can be a powerful planning and forecasting tool. For example, if you have 25 donors at step two, but only three at the third step, then you immediately know that you need to put your emphasis into moving group two along.

Project Future Fundraising Resource Needs

Analyzing the trends you see could give you insight about what kinds of fundraising objectives to set, what kinds of activities to plan, and what kinds of resources you will need. You can also use this kind of thinking to set up for a new campaign project, a capital effort, or expanding your current operations.

One group planned an expansion effort using their relationship management experience of the previous year. They tracked staff and volunteer time related to fundraising and matched that against the numbers and stages of donors. As a result, they were able to estimate the numbers of prospective donors they would need to interact with and the amount of staff and volunteer time needed. Armed with that data, they constructed a more realistic plan for interacting with donors and prospects for the coming year.

You can put this idea to work immediately by starting with a list of your current donors and prospects and labeling each by step as best you can. Then, your next assignment is to connect with them in some way to discover the next most appropriate action needed. Repeat as needed. ■

Kevin Johnson, CFRE, CSPG, principal of Retriever Development Counsel, coaches nonprofit leaders on how to be more effective in strategy, charting new directions, and building sustainable funding models. His book, *The Power of Legacy and Planned Gifts: How Donors and Nonprofits Can Change the World*, was published by Jossey-Bass earlier this year.

What You Don't Know Won't Help You: Major Gift Prospect Research

by Barbara Pierce

MANY DEVELOPMENT STAFF TELL ME that they do not have time to do prospect research—that is, to try to learn how much a prospective donor could give—and that only groups with a large staff and budget to match can afford this step. In fact, if you are interested in garnering individual major gifts for your nonprofit, the truth is you cannot afford to neglect to do prospect research.

The most successful major gift solicitations are based on a person's capacity to give balanced by their level of interest in your organization. Without knowledge of a donor's capacity to give, you may be missing the opportunity to ask for the right amount, leaving you focusing on "bumping up" donors to the next giving level rather than bringing them to their natural giving capacity. This article focuses on some ways to limit the amount of time you, as a fundraiser, spend on prospect research while getting the best results.

Three Things You Need to Know

As you start your research, you need to be quite clear about what you are looking for or you may end up with a thesis on a particular donor rather than the specific information you can use to make a solicitation.

You are looking for three things:

- **Capacity to give.** This is an academic way of saying, "How much money do they have to give in a perfect world?" You will not be able to arrive at an ironclad number. You need a ballpark figure as to whether a donor can give $5,000 or $50,000 if all of their charitable giving went to your organization.
- **Charitable inclination/willingness to give.** As we well know, there isn't a mandate that wealthy people have to give money away, and some people, however wealthy, make very few and/or very small gifts. Others, without great wealth, make very generous gifts. You need to know whether someone is indeed charitable before you dedicate your time to cultivating that person. You also need to determine whether their charitable interests align with your mission. If their largest gifts go to the symphony and your group focuses on homelessness, they may not be the best major gift prospects for your organization, regardless of capacity.
- **Connections to your organization.** If you don't already have a great match in terms of a peer solicitor, you will need to research whether other donors or board members know your potential donor. Word of caution: this is the part that can become a time sink; remember that you do not need to know who all of their friends are in your area.

Keep this list near your computer and check back to see if the information you are finding fits into one of these categories. It serves as a reality check when you are getting caught up in the details of what your donor wore to a gala or their recent divorce. Keep asking yourself whether the information you are finding is getting you closer to your ultimate goal of asking the person for the right amount.

Three "One-Stop Shopping" Resources

Right now, you may be using Google as your main research tool, and it is a great resource. However, if you are interested in getting the best answers to the key three questions in the shortest amount of time, Google is not your answer. Try out some "one–stop shopping" resources that have already done the work for you by culling data from dozens of sources to provide a quick and detailed overview of your prospect.

You can access the following resources for free by checking with your nearest Foundation Center Library or Cooperating Collection and some public libraries. Since your research is targeted to finding the top prospects among your donors, not every donor search will yield a lot of information, as the results center on real estate holdings, significant political contributions, insider stockholdings and nonprofit board and foundation ties—things that a lot of donors do not have.

WealthEngine (wealthengine.com). This is a wealth screening tool (see sidebar) that usually costs about $2,700 for an annual subscription but is provided free of charge at many Foundation Centers. It scans 25 databases to give you a profile of the prospect that includes all real estate holdings in the U.S., any stock holdings they are required to report as an insider, political giving, charitable gifts, board memberships, and who else they may know through their nonprofit and for-profit board memberships. A new feature allows you to click to see whether the donor is connected to any of your friends or friends' friends though LinkedIn or Facebook. All of the information here is publicly available; it just would take the average person a lot of training and ten times as much time to find it on their own.

This is a great "all-in- one" resource, but be careful—it is not infallible. Profiles often include erroneous information, such as gifts made by a different "David Smith," and often have inaccurate suggested ratings. Allocate time to verify some of the information you find.

Noza (nozasearch.com). While WealthEngine provides information on charitable gifts, I have found that Noza is much more comprehensive in terms of gifts to nonprofit organizations. It also provides links to the source of their information, including donor rolls, newspaper articles, and nonprofit websites. Looking at the source often gives you more information about other people who may know the donor and who may be a source of a personal connection to the donor.

The service costs $800 for an annual subscription but can be accessed for free through a number of Foundation Center locations and some public libraries. You can find a free trial link at their website.

ZoomInfo (zoominfo.com). You can access ZoomInfo from your own computer; all but contact information is free. It provides a wealth of biographical information and insight into personal networks and professional and nonprofit board affili-

Wealth Screening: Researching Your Entire Database at One Time

Editor's Note: Although the cost and scope of wealth screening is out of reach for small nonprofits, organizations with multiple chapters or that work in coalition with others may want to consider combining databases to take advantage of this type of screening, especially if your other searches reveal some potential large givers.

The ultimate "one-stop shopping" is often referred to as *wealth screening*. It is the process of running your entire donor database through a service such as WealthEngine or one of its more expensive competitors, such as Blackbaud Analytics.

Wealth screening is the best way to identify "hidden" major gift prospects among donors who are not giving your organization major gifts or qualifying that one of your consistent donors has much greater capacity to give than you knew. You can also use the results to gauge whether it is worth hiring more development staff if you find you have a goldmine of potential major gift prospects, or suggesting your executive director set aside more time to meet with the people you have identified.

A wealth screening search is an investment of both time and money. The least expensive options start at $4,000 for 10,000 names and go up to $50,000 for very large databases using a sophisticated analysis of your database as a whole, called data modeling. With some services, there is an option for nonprofits with databases of fewer than 10,000 records to group together for a screening, with the individual groups' results being segregated.

After you receive your results, you will need to dedicate time to verify the results are the right match with your prospects; for example, that the John Smith with $1 million in stock is indeed the same person who supports your nonprofit. You also need to integrate the results into your database, find personal connections to the prospect among your board and volunteers, and come up with a cultivation and solicitation plan.

However, the investment is easily returned if you find even a handful of donors who can give you much more significant gifts than you would have asked for previously.

ations. It also provides links to the sites from which they pull their information about the prospect. This is the site I go to first for biographical information.

When Should You Stop Looking?

Here's an easy guideline: Stop looking after 20 minutes. By that point, you should have a good sense of whether you've answered basic questions about capacity and willingness to give. Remember, you are just trying to figure out the range of the person's capacity to give. You will need to meet with the prospect and have a conversation about your work and their level of interest in it in order to arrive at a specific ask amount.

Research on its own is not going to provide you with all of the answers—personal cultivation is still the key to making the best solicitation.

How to Use What You Find

The fundamental value of prospect research for any major gifts program is to help you prioritize which prospects merit long-term cultivation by your executive director, development director, and board members. You should be able to provide factual information to your solicitors as to why they should be meeting with certain prospects.

The information also provides solicitors with confidence that they are talking about the right level of commitment with a prospective donor. As a staff fundraiser, I once petitioned the executive director to travel with me to a small town in Northern California to meet with a person I had dubbed a major planned giving prospect based on her small but consistent gifts to the organization for years, a letter in the file indicating her interest in leaving a bequest, and most important, information from my research showing multimillion-dollar stock holdings by her late husband.

As we approached her address, we saw that her home was a doublewide trailer, which caused the executive director to ask, "Why do we think this person is going to be a major donor?" At that moment, I was very happy I could point to the concrete data on stock holdings that I had gathered from my research showing the donor had major investments that belied her modest living arrangements. The visit was the beginning of a great relationship that resulted in an unrestricted seven-figure gift to the nonprofit a decade later.

In the age of Google and Facebook, more people are aware that you may have gathered information about them. One Silicon Valley prospect asked me directly, "What is my number?" After I recovered and he clarified that he was asking what I had found out about his net worth, I answered him with a round number that seemed to please him.

Most people are not this comfortable with the amount of public data available about them, but you should be ready to explain to solicitors how you arrived at your information. Emphasize that everything you've learned is publicly available. No research service is going to provide you with private information, such as someone's bank balance or total stock holdings.

Finally, make sure your research is captured in your database in the same place on each individual's record. Note the sources you used and when you conducted the research, even when your searches did not yield much data.

Learning more about a prospect is the first step to developing a personal relationship that can result in a growing commitment to your organization. Once you know enough about a person to invest time in building that relationship, you can help them learn enough about your organization to make it worthwhile. ■

Barbara E. Pierce is a San Francisco-based consultant on major gifts, capital campaigns, and research training for development staff. She can be contacted at b@piercefundraising.com

Raising Major Gifts—From $250 to $250,000

by Will Cordery

AFTER BEING A VOLUNTEER AND MEMBER of Amnesty International USA for more than nine years, I came on staff as their first major gift officer for the Southern region. My primary task in this position is to deepen relationships with current major donors across the 11-state region and identify major donor prospects.

As at many national nonprofit organizations, a major gift at Amnesty is defined as $5,000 and up. A donor may not be giving at that level annually, but major donors have a history of some giving at that level or higher. Similarly, prospects for a major gift rarely start giving at a major level, but we have identified that they have the capacity (and, we hope, the interest) to do so.

I was previously the development director at Project South: Institute for the Elimination of Poverty and Genocide. There I was responsible for leading and/or overseeing all the organization's fundraising efforts, including direct mail membership, foundation grantwriting and cultivation, monthly giving, publication sales, fee-for-service, accounting, budgeting, website, marketing materials, fundraising events, and passing the hat. With the help of a member who had experience in major gifts fundraising and wanted to see Project South further diversify its income streams, in 2005 I instituted Project South's first major donor program.

Project South's founders and founding director were committed to creating an organization that was financially independent and supported by its base. They knew that the only way such a transformative organization could flourish and stay principled was to be primarily funded by its members and its community. That also meant that we wanted to create a major gift program that was accessible to many people—from wage workers to independently wealthy people. Thus, as with many grassroots groups, Project South defines a major gift as $250 and up.

Although organizations like Amnesty International USA and Project South are on opposite ends of the spectrum in size and scale, the methods needed to raise a major gift are quite similar. The same theory and skills are applied to raising a $250 major gift as a $250,000 one—and for smaller groups, those skills can turn that $250 gift into a $5,000 donation.

One of the first things I learned about cultivating a donor prospect or stewarding a current donor is that you want them to hold three important elements: a relationship to the organization or its leadership, an interest in supporting its work (often identified by other charitable work they may support and through conversations with the prospect), and the capacity to make a larger donation. I still use these criteria in my prospecting, cultivation, and stewardship of new donors.

Finding Your Prospects

I quickly learned during my time at Project South that organizations working in sparse areas of wealth and resources must collaborate with other organizations, groups, and communities in order to make real strides in advancing our collective mission for social justice. Our people and our resources stretch beyond our own neighborhood or our local metropolitan area. Similarly, at Amnesty, I find new prospects across the region. I look for them in three places:

Among members. Individuals or families who have made $25, $50, or $100 annual donations for years but have never been asked for a major gift may be good prospects. I have major donors who currently give gifts of well over five figures who started supporting Amnesty with annual gifts of $25 many years ago. There must be others like them.

Individuals who support similar work or causes. Some donors never knew that Amnesty's human rights programs or campaigns were in their realm of interest. Many of my donors are involved with or support other causes. Once you learn about a donor's other organizational affiliations, you may start to notice common threads in the work they support: women's rights, education, leadership development, environmental justice, local organizing projects, regional organizations, humanitarian aid, policy organizations, and so on.

Research. As fundraisers, we sometimes make assumptions about someone's capacity based solely on their job or a previous gift they made. Although these can be indicators of capacity, they don't always give the full picture. So I always start with a

A COUPLE OF YEARS AGO, I attended a reception for an organizational partner. At my table was a successful business executive of an international corporation. Not only did this person have an interest in supporting human rights work, he had a history of giving to human rights organizations, including Amnesty, and even had relationships with current and former leaders at Amnesty. However, his support for Amnesty had waned due to bad feelings from a relationship with a previous staff member who did not leave Amnesty on the best of terms.

I saw, however, that this person still had an interest in the work, the capacity to support it, and some relationship to the organization. It was key to move this prospect beyond his previous experience with Amnesty. This meant introducing him to new staff leadership, building a personal relationship with him myself, finding out what his philanthropic interests were when he was previously involved, and providing him with information on current work that was similar in scope and currently of interest to him.

Most important, I needed to be patient. Early on, this prospect warned me that he was willing to meet with me but was not interested in reengaging with the organization. The fact that he was even chatting with me and willing to meet with Amnesty staff was a sign that there was an opportunity to bring him back to the organization in a thoughtful and respectful way.

Over the span of 11 months, I continued to keep him updated on Amnesty's work and seek his counsel on how to expand visibility in the South. Eventually, I was able to set up a meeting between him and Amnesty's executive director. Our interactions gradually became more personal and engaging. He was moved by a few email updates I provided on recent Amnesty successes. He was even willing to meet again in person despite his busy schedule. One year after our initial meeting, he renewed his support to Amnesty with a major gift.

simple web search on the person or family and see what type of hits I get. But Google is just a starting point. Jobs, organizational affiliation, social media profiles, professional history and business relationships may all be found on LinkedIn or Plaxo. I often check campaign giving websites like NewsMeat to see if and what kind of political giving a person or family has done. Dig a bit further and you can find out if they have foundations or funds managed by foundations. If they do, you can sometimes learn what their assets or philanthropic giving is on sites like The Foundation Center or GuideStar. (See the article "What You Don't Know Won't Help You: Major Gift Prospect Research" in this issue.)

Initial searches on Google have also given me insight into some of my donors' other philanthropic and charitable endeavors, such as serving on boards or fundraising committees for other organizations. Some may just have a history of giving sizeable gifts to your own organization and may warrant having in-person meetings about significantly increasing their support. Research can help identify if a member currently giving $25 has the capacity to give more.

Being Personable and Having Patience

Being patient and personable are critical to major gift fundraising. Giving a major gift is a mark of investment on the part of the donor, particularly new major donors. They want to feel good about the contribution they're making, they want to know it will have impact, and they want to trust the organization's leadership. Cultivating these assurances takes time. You'd never ask someone to marry on a first date and expect them to say yes. Some of the best and most fruitful relationships are the ones that develop over time and with mutual benefit. They are the ones where you both know each other well and have developed a mutual level of respect and trust.

DONORS WANT TO FEEL GOOD ABOUT THE CONTRIBUTION THEY'RE MAKING, THEY WANT TO KNOW IT WILL HAVE IMPACT, AND THEY WANT TO TRUST THE ORGANIZATION'S LEADERSHIP.

I always keep in mind that donors are people. So I make it a priority to get to know both prospects and donors as much as they will allow. I want to know who they are, what they like to do, what moves them to support human rights and social movement. I always ask what first brought them to Amnesty International or even what inspired them to make their first major gift. So many of them have a compelling story or memory that can be quite beneficial for the organization to know.

More times than not, the causes that your donors support at their most generous levels typically involve a personal relationship with someone within the organization's leadership. This is where major gift officers, executive leadership team members, board members, executive directors, and even major donors play a critical role in fundraising for major gifts.

Amnesty has been intentional about investing in building our donor base, from $25 to $250,000. Having staff or volunteer leadership devoted to major gift fundraising out in the field has been critical for meeting this goal. Previously, Amnesty had one staff person in New York and another in Los Angeles who managed and cultivated all relationships with major donors and prospects. Now, we have part-time and full-time major gift officers located around the country. As with grassroots organizing, major donor fundraising is most successful when you have real people building real relationships. We can know our supporters personally and they in turn have access to a person close by with whom they can talk about the work they're supporting. It is a mutual exchange that benefits both the organization and the donor and it is a relationship that can bring unexpected or increased support.

Here's an example of the benefits of closer relationships. One donor started as a direct mail member and after some years gave a major gift of $5,000. Since then she had given much more modest gifts. After introducing myself through a letter and offering to have a phone conversation to answer any questions she may have about our work, she and I began to exchange emails periodically and we spoke on the phone a few times. I learned more about what first moved her to make a gift (a major human rights crisis twenty years ago that she knew we were working on). I also learned of her deep commitment to women's rights and to combating gender-based violence. Most important, I learned that the major gift of $5,000 many years ago came because she and her husband had come into some extra discretionary income and wanted to give it away to organizations they admired.

Our phone and email exchanges taught me several important things: her philanthropic priority was women's rights, she was married and made decisions about her philanthropy with her partner, she thought enough of Amnesty to make a major contribution with little or no personal interaction with our staff or leadership, she and her husband were not in the position to sustain their support at a major level every year but were committed to supporting the work, and she welcomed the opportunity to have a phone conversation with an Amnesty staff person. Although she may not have become a major priority for securing another major gift in the near future, she was definitely invested in the work (Interest) and open to building closer ties to the organization (Relationship). I tried to meet this donor in person during my travels throughout the Southern region, but our schedules did not coincide. Nonetheless, the relationship between her and the organization was strengthened by the mere effort to meet.

Approximately a year after she and I began communicating by phone and email, she called me with some great news. She and her husband had come into some stock (valued at nearly $10,000) that she wanted to donate to charity and she wanted to give it to Amnesty! I'm confident that she felt good about making this gift not only because she was kept updated on Amnesty's work and our campaigning to stop violence against women but also because she had now developed a personal relationship with the organization and was even more confident that her support would have impact.

Putting Your Donors in Leadership

Some of the most committed members and donors want to do more than just write a check. If they have been cultivated and stewarded properly, your closest donors will want to help strengthen the organization's infrastructure through volunteer leadership. I've worked with donors on host committees, planning committees, fundraising committees, community service projects, boards, foundation site visits—you name it. Their willingness to take on responsibilities and to learn about the inner workings of an organization demonstrates a loyalty beyond any single major gift. In fact, donors who join your fundraising committees or chair your boards are almost always planning to be lifelong supporters of your work.

I'm working with donors who not only give large annual donations and sit on fundraising committees, but who have also offered to meet with new donor prospects, give testimony about why they support Amnesty, and ask others to do the same. I've learned that you always want to have an “ask”' for a major donor if you get a meeting. Sometimes it's for a gift, but most of the time it's to do something that will help deepen the relationship—like attending a meeting with you, making a key introduction, taking an action, underwriting an event, or other volunteer leadership roles.

Timothy Higdon, successful fundraising consultant, Adjunct Assistant Professor of Philanthropy and Fundraising at New York University, and Amnesty International USA's Deputy Director for External Relations, has a straightforward, three-step model of donor stewardship: cultivate, brief, and ask. You and your donor prospect first get to know each other, you find out their interests and keep them up to date on those interests, and you ask them to deepen their commitment to fulfilling your organization's mission.

The beauty of such a simple model is that it can be applied to many types of organizational relationships. I recently met with the coordinator for Georgia's Alternative to the Death Penalty to discuss fundraising strategy. We agreed that many of the elements used in fundraising are also used in grassroots organizing campaigns and partnerships. Fundraising is organizing. You're gathering up your supporters, finding new supporters, strengthening their commitment to your ultimate collective goal, and springing them into action.

Whether your major donors give $250 or $250,000, finding and keeping them follow the same principles: get to know them and treat them as the important people they are to your group. You will be rewarded with loyalty in giving and ever-greater involvement in the success of your group. ■

Will Cordery is the senior major gifts officer for the Southern region of Amnesty International USA. As a key member of the Resource Mobilization Working Group for the first US Social Forum, Will designed and helped institute multiple fundraising strategies that raised nearly $1 million.

After the Yes: Twelve Questions You Can Ask Donors

By Andy Robinson and Harvey McKinnon

When would you like me to wash your car?
Have you considered adopting an adult?
May I have another piece of cheesecake?

But seriously, folks…

If you're new to face-to-face fundraising, you're probably focusing on "the ask": how to frame your request in the most compelling, inspiring way. Without a doubt, a strong ask is one of the keys to successful fundraising—but then what? When you hear the words, "Yes, I'd like to help," how do you respond?

First of all, be grateful and enthusiastic. Show your heartfelt appreciation. Talk about how the gift will make a difference.

Then it's time for the "after questions."

Not every question below is relevant for every donor or every visit. You're engaged in a conversation or perhaps a negotiation, not an interrogation. Choose the questions that seem most relevant and adapt them to your needs and circumstances.

1. "How would you like to pay? Do you want to write a check now? Would you like us to send you a pledge statement in the mail? Are you interested in signing up for our sustainer program—that way you can fulfill your pledge in automatic monthly installments."

   Many solicitors bring pledge forms to the meeting and fill them out with the donor. The main question above, along with several below, could easily be included on this form.

2. "How do you want us to use this gift?" Check your notes from this meeting and all previous conversations with the donor. If you sense any indications that she wants to restrict her gift to a specific program or campaign, this is the time to clarify and honor that intent.

One of the advantages of engaging individual donors (compared to foundations, corporations, or government grantmakers) is that, in most cases, they can provide general donations to use as you see fit. You want unrestricted gifts whenever possible and need to be comfortable asking for them. If the donor has indicated an interest in earmarking her contribution, however, a skilled asker can sometimes negotiate a broader use of the money. This gives the organization more flexibility while still meeting the donor's goals.

For example, you might say to the donor, "You've expressed an interest in child development, which encompasses nearly everything we do. With the understanding that you want your gift to benefit children and their families, may we use the money to support our children's programs as we see fit?"

If you're seeking restricted funds, before meeting with donors be sure your organization has a gift acceptance policy. It should specify, among other things, the minimum donation that would qualify as a restricted gift. If you set a number that's too low, expect a battle with your bookkeeper—and we support the bookkeeper. (For more on gift acceptance policies, see "Gift Acceptance Policies and Legacy Giving," by Fred Matthews, *Grassroots Fundraising Journal*, Vol. 26, No. 2.)

3. "How would you like to be recognized? We publish donor names in our newsletter, our annual report, and our website. We'd love to include your name so we can publicly express our thanks—and your commitment will inspire other people to give. May we list your name or would you prefer to be anonymous?"
4. "Do you want your gift to honor someone you care about? We can list their name, your name, or both." When preparing your pledge form, include space to collect this information.
5. "Tell me a little more about why you support our work. We're always interested in what motivates our donors to give; this helps us reach out to other potential donors. You just made a very generous decision—I'd really appreciate knowing why."
6. "Would you be willing to give a testimonial we can use in our newsletter and other promotional materials? May we include your photo? Our most generous supporters—people like you—are our most credible advocates. May we have a sentence or two to share with others?" Note: depending on the nature of your organization (and the advice of your attorney), you may require a signed photo release form.
7. "Would you be willing to join us at a board meeting and talk about why you support our work? It's really helpful for the board to hear directly from donors—it reminds them why we do the work we do and why it's important to ask people to contribute. It will inspire them to work harder in support of our mission. Would you share your experience with the board?"
8. "How would you like to be kept informed about our work—and how often? Do you want a printed newsletter or do you prefer brief emails? Shall I phone you from time to time? Do you participate in social media like Facebook? Would you prefer to receive updates in person—and if so, how many times per year?"
9. "When I come back to give you an update, would you be willing to include family members so they can learn about your support of our work?" If you're cultivating donors for future gifts, especially planned gifts, this is an essential step.
10. "Can you recommend other people we can talk to about a gift? Do you have friends or colleagues who might want to join you in supporting our work? Would you be willing to make an introduction—by phone, by email, or in person—or join me for the initial visit?"
11. "Given your strong commitment to our work, would you consider volunteering to help us raise money? For example, would you be willing to come along and talk about why you give when I meet with prospects?"
12. The final question requires some courage, but asking it is a lot better than wading through a series of unspoken assumptions: "What's your personal giving calendar? Are you typically a once-a-year donor? Twice a year? If we have an urgent need, can we approach you again? What schedule works best for you?"

Capture all this information and enter it in your database or other donor management system immediately. Congratulations! You've just created a personalized road map for engaging your donor and honoring her wishes. If you use it, and use it diligently, it will lead to repeated (and larger) gifts. ■

Harvey McKinnon (harveymckinnon.com) and Andy Robinson (andyrobinsononline.com) are consultants based, respectively, in Vancouver, BC and Plainfield, VT. Harvey's latest book is *11 Questions Every Donor Asks*; Andy's is *Great Boards for Small Groups*. Both are available from Emerson & Church, emersonandchurch.com. Harvey knows more jokes; Andy makes better salsa.

THE SOUL OF MONEY Meets the *Grassroots Fundraising Journal*

by Beth Raps

MANY OF US HAVE HEARD OF LYNNE TWIST, her book, *The Soul of Money*, and her institute of the same name. She's known for having raised hundreds of millions of dollars in the past for The Hunger Project and now for the Pachamama Alliance from super-wealthy individuals. Her comfort with fundraising from the super-wealthy can make some of us in the grassroots fundraising world uncomfortable. Yet when I attended a Twist training this past spring, I found a lot that was both radical in its viewpoint and useful for grassroots fundraising.

Let's start with Twist's teaching that we are enough even if we don't feel we have enough. Twist contends that even very wealthy people need to be reminded of the fact that self-esteem goes beyond monetary wealth—a radical idea indeed! The oppressive equation that net worth = self-worth is apparently something we all have to unlearn. Unlearning it makes us better able to imagine approaching wealthy prospects no matter how much money we grew up with.

As we seek to do better major-donor fundraising, we can try on the idea that people much wealthier than we are may, like us at times, feel that they don't have enough and that therefore they aren't good enough. This understanding can change our approach to building relationships with donors wealthy enough to make us nervous. We can approach them the same way we do less wealthy donors, by assuring them their gift is meaningful.

Increasing our confidence to approach people with wealth not only makes good fundraising sense, it makes good radical political sense as well. We *Journal* readers are trained that a fundraising campaign requires donors at each giving level. This diversity, I like to point out, is also true of the beloved community we seek to build, where no one is too poor or too rich to qualify. (And I also enjoy pointing out that it's like Marx's maxim, "From each according to ability, to each according to need.")

Sometimes, though, we cheat this ideal of diversity in one of two ways: we either avoid asking people whose wealth makes us nervous or we overemphasize large gifts to the exclusion of the many small ones we equally need to build our base. The appropriate distribution of large gifts, medium-sized gifts, and small gifts to our particular campaign, grounded in the confidence we can ask whomever we need to ask, balances our work and builds the beloved community, where each person and gift has a place.

Twist also teaches that giving money is always an honor. When we ask for a gift, we are doing others a service by seeking to involve them in our world-changing work. It's a blessing we have the power to share, a privilege we offer people of every degree of wealth. In this sense, we are conferring a blessing on others by inviting them to join with us in solidarity across class: what radical confidence! Twist's work seeks to impart this confidence. No matter how much money we grew up with or have now, remembering that the person in front of you has sometimes felt that they were never enough creates an opening in us. That opening then builds a feeling of solidarity from human to human in the service of the amazing work we are doing. This solidarity then builds our self-confidence and sense of entitlement in inviting them to join in by giving.

Some of what Twist teaches feels like magical thinking if we don't have our own sense of entitlement to ask. One "magical" Twist teaching, for example, is that there is always enough money for what we need if our fundraising is driven by our mission and our passion. My personal experience is that this is true: money comes when we share our passion for the work with others.

But how do you drum up the feeling of being entitled to ask wealthy people for money for your cause if you simply don't feel you are—yet? One way is to act "as if," act as if you did. The better actor you are, the quicker this will work. Try treating your scariest donors as if you had something deeply special to offer them, that there's plenty of support for it but that you knew they'd want to be a part of it, so you are inviting them to join in by giving. After you've made a presentation like this, debrief with a supportive colleague when you get back to the office, and evaluate whether you felt more comfortable and confident.

Try this new mindset. Visit donors or prospects grounded in confidence, entitlement, and openness, and see where it leads you. Don't be afraid of success! May your fundraising not only increase the giving you seek but the beloved community we deeply desire. ■

Beth G. Raps, Ph.D./Bringing Money to Light has raised money for 25 years for progressive nonprofits. She now also works with individuals of diverse economic backgrounds and incomes helping them claim the abundance available to them as they change the world.

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