

Grassroots Fundraising Journal

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A PUBLICATION OF



Moving Up to Major Gifts

Starting a Major Gifts Program

**Connecting With the Humanity
of Our Donors**

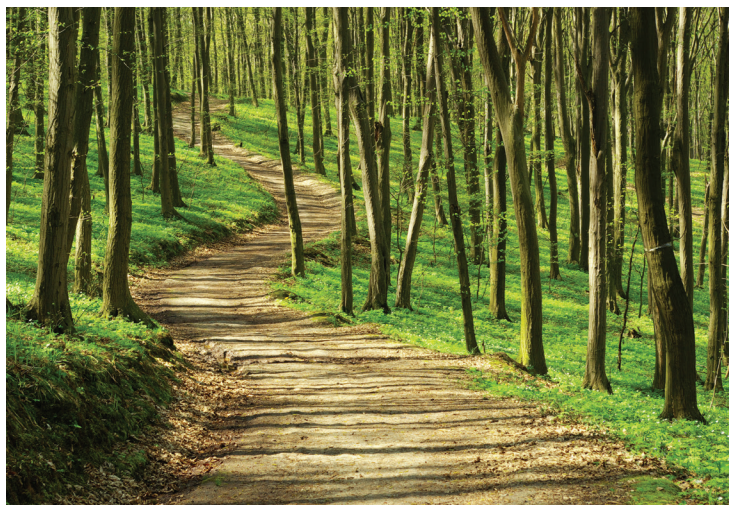
**Building Your Major Donor
Strategy**

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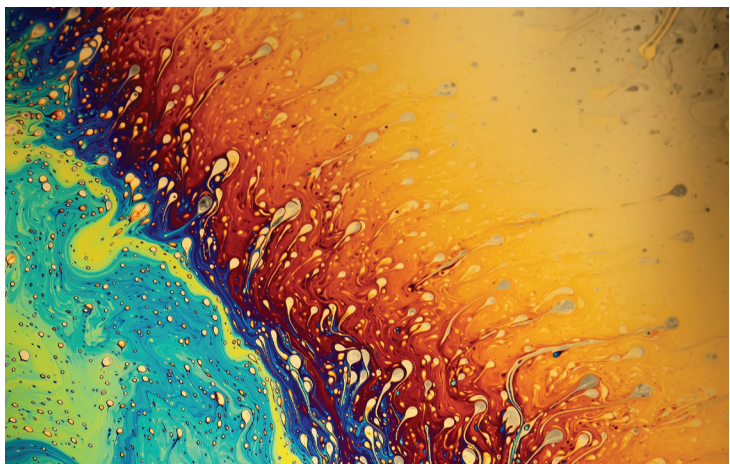
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On Our Cover

The morning sun in Myitkyina, the capital city of Kachin State in Burma. Photo by Rebecca Wolsak, Inter Pares, interpares.ca. Inter Pares, a nonprofit based in Ottawa, Canada, has worked with local organizations in Burma and refugee-receiving neighboring countries for over 20 years. A key focus is coalition building for interethnic understanding. Learn how Inter Pares used surveys and list segmentation as an effective major donor strategy in this issue.

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Deepening Donor Engagement

HAPPY NEW YEAR! Despite December being the busiest time of year for us fundraisers, I hope you were able to take some time off to relax, rejuvenate, and imagine new possibilities in preparation for the year ahead.

This issue of the *Journal* addresses many of the questions and dilemmas we grapple with as fundraisers: How do we know when it's appropriate to ask donors to increase the size of their gift? When are the most opportune times to get to know our donors better and learn what motivates them to give? How should we treat our donors differently based on how they relate to the organization?

Whether you're just getting started or already have a robust major gifts system in place, these articles highlight important dynamics to consider, and provide practical tips for refining your strategies to deepen donor engagement. Kim Klein opens this issue with a step-by-step guide for getting your major gifts program off the ground, and shares how she copes with her own fears of asking. Next, Paul Jolly explores individual, organizational and donor dynamics that can inhibit our ability to grow our base of support. Jack Hui Litster follows with a piece documenting how Inter Pares used surveys and segmenting to transform an impressive list of major donors into smaller subgroups, with whom the organization now interacts differently according to the nature of the relationship.

In other news, we would like to congratulate Kemi Ilesanmi and The Laundromat Project who won \$100 credit with GIFT for participating in our Reader Survey. Based in New York, The Laundromat Project "...amplifies the creativity that already exists within communities by using arts and culture to build community networks, solve problems, and enhance our sense of ownership in the places where we live, work, and grow." Thank you again to all of you for sharing your feedback with us!

We also express our gratitude to the good folks at Inkworks Press, which used to print the *Journal* before closing its doors at the end of 2015. A worker-owned, union and green printer based in the Bay Area, Inkworks printed the stationery, newsletters, posters, and more of nonprofits, artists and activists for over 40 years. We will miss working with you, Inkworkers, and thank you for the many years of stellar service!

Finally, now that you have August 12th to 14th in your calendars, we are ready to review your brilliant workshop proposals for this year's Money for Our Movements Conference! Please visit grassrootsfundraising.org/mfom to submit your ideas. Registration will go live in early February.

I look forward to seeing you this summer!

The cost of publishing the *Journal* is covered solely by subscriptions and donations made by people like you.

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or by calling 510-452-4520 x303. Thank you!



Starting a Major Gifts Program

By Kim Klein

This article is adapted from the upcoming 7th edition of Fundraising for Social Change for the Grassroots Fundraising Journal. The book will be available in fall 2016.

THE FINANCIAL PAYOFF in fundraising is when you regularly receive large gifts from an ever increasing number of your donors. To build a major donor program, no matter the size of the organization, a majority of staff, board and volunteers must feel comfortable asking people for money in person (see “Asking for a Major Gift: A Team Training Exercise” or “More Askers = More Money: An All-Staff Approach to Major Gifts” in the *Journal* archive on this topic). For many people, that comfort starts with being able to ask someone to purchase a \$20 ticket to a benefit event or for \$35 to become a member.

Some people never move past that level of comfort. But if an organization is to grow and thrive, a critical mass of board, volunteers and staff must be able to ask for much larger gifts—\$500, \$5,000, \$50,000, and even more.

A person doesn't have to like asking for money to be able to do it. Some of the most successful fundraisers I know have confessed that they always feel anxious when asking for money. But they do it anyway. Sometimes their nervousness makes them prepare

more thoroughly for the solicitation and feel even better about themselves and their group after they complete it.

Once it becomes part of the organizational culture to always have a cross section of board, staff and volunteers who ask for large gifts, you then need a system for identifying prospects and regularly soliciting such gifts. That system is a major gifts program.

Before beginning a major gifts program, your organization must make a number of decisions: how much money it wishes to raise from large gifts, the minimum amount that will constitute a major gift (I recommend \$500 but many organizations start at \$250), and how many gifts of what size are needed. In addition, you must decide what, if any, tangible benefits donors will receive for their gifts and what materials will be needed for the solicitors. Finally, a core group of volunteers must be trained to ask for the gifts.

Setting a Goal

The first step in seeking major gifts is to decide how much money you want to raise from major donors. This amount will be related

Getting Over My Own Fear of Asking

Over the decades that I have been in fundraising, I have asked a few thousand people for gifts of all sizes, including three requests for \$1,000,000. (Of those three, one person gave the whole amount, one gave \$300,000, and one told me she would rather fall face first in her own vomit than give our organization money—but that's a long story.) My feelings about asking have evolved from, "Do I have to?" to, "This is exciting." To this day, sometimes I think, "Do I have to?" or, "Can't someone else take a turn?"

Even though I tell people not to take rejection personally, I have to admit that on bad days I sometimes do take it personally—and I have to work to let it go. In my experience, no one ever arrives at a place of total peace with asking. But with familiarity, we have more of those peaceful times and fewer times of anxiety, frustration even resentment because of this work.

Often my feelings of peace are enhanced by euphoria after being told, "Yes, I'll do it," gratitude for someone's extraordinary generosity, or pride in the accomplishments of the organization. Some donors make it easy to ask because they are so moved by the work or are warm, caring people. Sometimes I am just flooded with relief when the donor said yes right away or the donor wasn't at work when I called!

Feelings are not facts. They come and go, and they are often not very logical. I have found the best way to be the most comfortable with asking is to feel confident that I have made a significant gift, not just of my time, but also of my own money, before asking for a major gift. When I know I am asking a prospect to join me by making their own gift, I stand on firm ground.

to the overall amount you want to raise from all your individual donors and can be partly determined on the basis of the following information.

Over the years, fundraisers have observed that a healthy organization's gifts tend to come in as follows:

- 10 percent of the donors give 60 percent of the income.
- 20 percent of the donors give 20 percent of the income.
- 70 percent of the donors give 20 percent of the income.

In other words, the majority of your gifts will be small, but the bulk of your income will come from a few large donations. Given that pattern, it is possible to project for any fundraising goal how many gifts of each size you should seek and how many prospects you will need to ask to get each gift.

It is easy to see that if your organization must raise \$100,000 from grassroots fundraising, you should plan to raise \$60,000 (60 percent) from major gifts, mostly solicited personally; \$20,000 (20 percent) from habitual donors, mostly solicited through phone, mail or email, as well as regular special events; and \$20,000 from people giving for the first or second time, solicited from mail and online appeals, speaking engagements, special events, product sales, and the like.

If you have 500 donors, expect that about 50 of them will be major donors, over 100 will be habitual donors, and about 350 will donors who only give to your special event or in response to a crowdfunding campaign, but for whom your organization is not a high priority. The lowest major gift you request should be an amount that is higher than most of your donors give but one that most employed people can afford, especially if allowed to pledge. Even some low-income people can afford \$60 a month,

which brings being a major donor into the realm of possibility for all people close to your organization.

Some organizations try to avoid setting goals. Their feeling is that they will raise as much as they can from as many people as they can. This doesn't work. Prospects are going to ask how much you need; if this answer is, "As much as we can get," your agency will not sound well-run. If prospects think you will simply spend whatever you have, they will give less than they can afford, or nothing. Further, without a goal there is no way to measure how well the organization is doing compared to its plans. Just as no one would agree to build a house based on the instructions, "Make it as big as it needs to be," organizations can't be built on the premise, "We will raise whatever we can."

Deciding How Many Gifts and What Size

It would be great if you could say, "Well, we need \$40,000 from 10 percent of our donors, so that will mean 200 people giving \$200 each." But 200 people will not all behave the same way—some will give more, most will give less. Given this reality, fundraisers have made a second observation: For the money needed annually from individual donors, you need one gift equal to 10 percent or more of the goal, two gifts equal to 10 percent (5 percent each) or more of the goal, and four to six gifts providing the next 10 percent of the goal. The remaining gifts needed are determined in decreasing size of gift with increasing numbers of gifts. Let's imagine an organization that needs to raise \$200,000 from a wide variety of individual donor strategies. Using the pattern just outlined, \$120,000 will be raised from gifts over \$500. Their gift range chart will look something like the example shown here.

Major Donor Gift Range Chart: \$200,000 Goal

	Number of Gifts	Size of Gifts	Total
Major Gifts	1	\$20,000	\$20,000
	2	\$10,000	\$20,000
	5	\$5,000	\$25,000
	10	\$2,500	\$25,000
	20	\$1,000	\$20,000
	20	\$500	\$10,000
Total	58 Gifts	\$500–\$20,000	\$120,000 (60% of total)
Other Gifts @ \$250		\$100–\$499	\$40,000 (20% of total)
Remaining Gifts	Hundreds	\$5–\$99	\$40,000 (20% of total)

The Gift Range Chart is like a map drawn on a napkin—it is not to scale, and few campaigns wind up having every gift fit exactly into every category. But it is an important planning document and is helpful for testing the reality of a goal. For example, if your goal is to raise \$100,000 but the biggest gift you can imagine getting is \$500, then you will probably have to lower your goal. The chart is also helpful for board members and other volunteer solicitors who may have difficulty imagining raising \$100,000 but can imagine thirty people giving \$250 each.

How Many People to Ask

Every fundraising strategy, presuming it is done properly, has an expected rate of response. For major gifts, the expected response

THE GIFT RANGE CHART IS HELPFUL FOR TESTING THE REALITY OF A GOAL.

rate is that 50 percent of prospects will say yes to making a gift when the gift is requested by someone who knows the potential donor, knows that that prospect believes in the cause, and feels reasonably certain that the prospect could give the amount of money being asked. However, if the prospect does say yes, there is a further 50 percent chance that he or she will give less than the amount requested.

With this understanding, for every gift you seek through personal solicitation, particularly at the upper reaches of the chart, you will need at least four prospects—two will say yes and two will say no. Of the two who say yes, one will give a lesser amount than requested. Because the higher gifts prospects who say yes but give

less than asked for end up filling in the number of gifts needed in the middle and bottom ranges of the chart, you will need only two or three new prospects for every gift needed in those ranges. Overall, look for about three times as many prospects as gifts needed. For the \$200,000 goal, then, the top portion of the chart would be expanded to include numbers of prospects.

Major Donor Gift Range Chart & Prospects: \$120,000 Goal

	Gifts	Size of Gifts	Number of Prospects	Total
Major Gifts	1	\$20,000	4	\$20,000
	2	\$10,000	(x4)8	\$20,000
	5	\$5,000	(x3)15	\$25,000
	10	\$2,500	(x3)30	\$25,000
	20	\$1,000	(x2)40	\$20,000
	20	\$500	(x2)40	\$10,000
Total	58 Gifts = 137 individual prospects			

In other words, when someone from your organization asks four qualified people for \$20,000, two will say no, one will give \$20,000, and one will give less than \$20,000. As you go down the chart, you are filling in the next layer with the smaller gifts from the higher layer, so you don't need to identify quite as many prospects for the gifts you need in the lower layers of the chart.

Materials for Major Gift Solicitation

In addition to the gift range chart and a list of prospects, three more elements need to be in place before your organization can begin to solicit major gifts: 1) what, if any, benefits you will give to major donors that are not available to other donors; 2) materials that describe your work and how to make donations; and 3) people to solicit the gifts.

Benefits

While helping the organization is the main satisfaction for the donor, an added incentive will show that you appreciate the extra effort the donor is making and will remind the donor of his or her gift to your organization. Ideal incentives should be meaningful without costing your organization very much—for example free tickets to a special event your organization is hosting, a mug, or a book related to your work.

There is no evidence that one kind of benefit works better than another, and there is some evidence that donors prefer more personal attention and more information about your organization rather than tangible benefits. Certainly, the benefit should not be very expensive. Under IRS law, any value of a benefit that exceeds the vague criterion of “token” is not eligible for the same tax deduction as the rest of the gift. For example, if someone gives \$500

to an organization and receives an etching worth \$50, the donor can only claim \$450 of this gift on their tax return because \$50 is more than a token amount. If the same group gave a T-shirt or tote bag worth little or nothing on the open market, the donor could claim the whole \$500 as a tax deduction. The IRS is increasingly questioning expensive benefits for donors, and donors can be annoyed by having to remember that what they gave your organization is different from what they can deduct.

If you decide to have a benefit, the benefit should be easy to deliver, which is why many organizations use mugs or books (no color or size options, won't get stale, etc.). Because of the number of items people commonly get for their gifts to public television, public radio, or major national organizations, a small organization should probably offer something that is related to its programs.

For example, an organization working for stricter controls on and alternatives to the commercial use of pesticides sends a short booklet on alternatives to pesticides for home gardens and indoor plants. An after-school program for inner-city children asks the teachers to save drawings students made and sends them to donors along with its thank you notes. This benefit is truly of token value, but it is very popular with donors. Now the organization has one day on which the children are asked to make "thank you" drawings. A public policy think-tank has a monthly "briefing call" that donors can join. The policy director gives a short update on the policy issues the organization is working on, discusses pros and cons of different positions, and invites questions and comments. This is popular with some major donors and also gives the staff an early sign of what questions and comments a friendly audience might have about a particular policy position. What is nice about these kind of benefits is that they can be extended to anyone who has gone above and beyond for the organization, including long time donors or faithful and reliable volunteers.

A major donor program can be run successfully without giving any benefits beyond what are offered to all donors, such as the newsletter. This approach will only work if the donors are thanked personally and promptly and if the organization keeps in touch with them using the ways recommended in the section on renewing major gifts later in this article. Personal attention and information on what work the organization was able to do as a result of the donor's gift will always be the most effective benefit for maintaining and upgrading your donors' giving.

Descriptive Materials

It goes without saying that every organization needs a good, up-to-date website that delivers information through pictures, graphs and even short videos, in addition to text. But solicitors need some print materials separate from the website for major donors. Some organizations create a brochure aimed at a major donor audience, but many eschew that expense in favor of simple 8 ½ by 11 sheets of paper with "Frequently Asked Questions," a copy of the gift range chart, and a list of what the money will buy. These docu-

ments are put into an attractive folder with a picture or the logo of the organization on the front. Each sheet lists the website so people can easily give online, but also has a return envelope for the many people still using checks. Because these materials will be used primarily in personal solicitation, they should focus on ways to make thoughtful gifts. For example, encourage people to make a monthly pledge, and describe the tax advantages of giving highly appreciated assets.

The information in the packet is essentially a published, though perhaps condensed, version of your case statement. It also helps

KEEPING DONORS INTERESTED IN YOUR GROUP REQUIRES SHOWING SOME INTEREST IN THE DONOR.

volunteer solicitors by giving them something to leave with a donor and to refer to if they forget some information they meant to impart. Make sure all your print materials are completely clear about how to give and encourage the donor to visit you online.

Solicitors

Finally, you need to have a core group of people willing to do the soliciting. Some of these people should be members of the board of directors, but the board's work can be augmented by a group of volunteers. These people should be trained in the process of asking for money, but they do not need previous experience in asking for major gifts, nor do they need to know many prospects personally. But they must be donors—ideally, major donors—themselves.

Keeping in Touch With Major Donors

One of the most frequent complaints from major donors is that organizations treat them like ATM machines—they punch in the amount they want and then walk away until they need money again. Keeping donors interested in your group requires showing some interest in the donor, particularly some interest in why the donor supports your group. To give major donors this extra attention takes work, but it is work worth doing for several reasons: first, because it is courteous; second, because it brings donors closer to the work of your group, making them potential activists or advocates; and third, because it will bring in more money.

In addition to when you ask major donors to renew their gifts, you should be in contact with them two or three times a year. You will want to be in touch with some donors more often than that, depending partly on the size of their gift and mostly on their personality and expressed level of interest. Remember that major donors are a good source of feedback, advice, and volunteer energy, as well as a source of other major donors.

There are several easy ways to keep in touch that make major donors feel personally appreciated that do not require much time or money. You can choose from the suggestions here or develop your own system, but be sure to get a system in place.

Send a holiday card in December. The card should wish the donor happy holidays and be signed by the chair of the board, a board member with a personal relationship to the donor, or a staff person. If possible, write a brief note on the card. The card goes alone—no return envelope, no appeal letter. (You may also send major donors a year-end appeal in a separate mailing.) Unless your organization is religiously identified, make sure the card (and even the postage stamp you choose) has no religious overtones, including cultural Christian overtones such as Santa Claus, elves, or Christmas trees. Even if your relationship to the donor is entirely online, send a printed card if you have a street address. Very few people dislike getting personal mail, and many who grew up with snail mail miss the personal notes and letters than have been replaced by email.

Attach a personal note to your annual report or a personal email with a link to the report on your website. All donors should receive a copy of your annual report. You can put it on your website and send an email with a link to the report and a brief note thanking donors for all they have done to make the work reflected in the report possible. The major donors with whom your correspondence is by mail will need to get a printed copy of the report and a personal note. The note can be on a Post-It and does not have to be long. It can say something like, “Thought you’d be interested in seeing this year’s report since you have been so important to our success,” or, “I hope you are as proud of our work as we are—your gift helped make it possible.” It doesn’t matter if you don’t know the donor—a personal note shows that they are appreciated. If you know that something in your report will be of particular interest, note that. For example, “Paul, that program you asked about is featured on page five,” or, “Fran, check out the photo on the back inside cover.” Staff usually write these notes, but again, board members with relationships to these donors can write them as well.

Note in your paper report that the report is also posted on your website, and encourage donors to send that link to friends and colleagues. The paper copy may well grace the coffee table or magazine rack in the waiting room of an office. The annual report is a very important piece of communication. Even the smallest nonprofit should budget some money so that the report looks attractive, has some photos, and is well written and laid out.

Report successes during the year. If you have positive press coverage, if you win a victory in your organizing or litigation efforts, if you are commended by a community group, service club, or politician, take the opportunity to send a special letter to major donors telling them of the event. If possible, include a copy of the article or commendation. This letter does not have to be personalized.

Note a donor’s accomplishments. If you learn that someone graduated from college, won an award, or had a baby, send a card. Don’t spend a lot of time trying to learn this kind of information, but pay attention and respond when the information comes your way. Although not an accomplishment, if you know a donor’s birthday, you can send a card then too. If you have your donor’s email address (and you should), you can send e-cards to save postage.

Include brief personal notes with all mailings. You can include a brief note with anything major donors will be getting anyway, such as invitations to special events or announcements of meetings.

Include major donors in some general mailings. Although you will probably not send major donors all the requests for extra gifts that are sent to the rest of your donor base, include major donors in mail appeals that are particularly timely or about specific issues that will be interesting to them. You can always put a Post-it on the mailing that says, “This is just FYI.” The same goes for e-appeals: The subject line for major donors can be “Just FYI.”

Just send a quick email. You will be in touch with many of your major donors by email when you are requesting a renewal. So that your email is not always about money, from time to time, drop them a brief note or forward something that you think they will be interested in seeing.

By keeping in touch with your major donors, you will lay the groundwork necessary to approach them for a renewal of their gift in the second year they give and a request to increase the size of their gift the third year of their giving. Even if no one in your organization has ever met this major donor and their gift came unsolicited, you will begin to build a rapport that will enhance the interaction when you meet the person in the future.

Renewing Major Donor Gifts

The process for approaching major donors to renew their gifts will vary depending on the amount they have given. This section describes how to ask for renewals of various size gifts.

Gifts of \$250-\$499

Although these gifts are not technically major gifts for most groups, these donors may be stretching to make them and need a little more personal attention than smaller donors. Near the anniversary of the donor’s gift, send an email (or letter) asking them to give again. In the email, describe the highlights of the year just passed and attribute some of that success to the donor’s gift. Wherever possible, use stories to illustrate your work rather than simply narrating one dry fact after another. One paragraph should be devoted to the needs of the coming year. The next paragraph asks the donor to renew their gift. The letter should ask for the same size gift as the donor gave the previous year, which both reminds the donor of the amount of their last gift and shows that your organization keeps careful records. Offer to talk if the donor

would like, and include the link to the website so the person can give online. If you have sent a letter, then include a reply device and return envelope.

Gifts of \$500-\$999

Use the format for gifts up to \$500, but follow your letter or email with a phone call within 10 days. In the letter, let the donor know you are going to call.

The phone call will go something like this:

"May, this is June calling to follow up on my letter."

"Yes, June. It's lovely of you to call. I've already sent in my check—and congratulations on your good work."

June can then thank May for renewing her gift and ask if she has any other questions or tell her something that wasn't in the letter (but be brief!). The whole interaction will not take more than five minutes unless May has some questions. June will very likely get May's voicemail, and her message will be essentially the same, "May, this is June calling to follow up on my email. I just wanted to thank you again for your support last year, and ask you to consider giving again this year. I will try you again on Wednesday."

After two attempts, return to email and say, "Dear May, Would love to talk with you about our work, but I know you are really busy. Do you have any 10-minute windows in the next day or two?"

Many times these interactions will be completed by email, with May responding, "I am drowning in work but want to help. Remind me in a month." If used well, email is a great boon to donor solicitation.

Gifts of \$1,000 or More

Send a much briefer letter telling the donor you would like to visit with them and that you will phone to set up a time. If you are simply asking for a renewal, the telephone request for a meeting will often go like this:

"Frank, this is Earnest. Did you get my letter?"

"Yes, it came yesterday."

"Great. Can we get together sometime to talk about the possibility of you renewing your gift?"

"You don't need to visit me for that. I'll be happy to renew."

In this exchange, even though he is planning to renew his gift, Frank may still feel pleased that he was given this attention; again, the interaction is very brief. If Frank does want to meet, he will be drawn even closer to the organization and you will have a chance to see how your group appears to someone who is thoughtful about how much money to give you.

Some major donors, particularly those who live far away from the organization, prefer email to phone follow-up, and your entire conversation may be done by email.

When to Ask for More

Two questions often arise: How many times should you ask do-

nors to renew their gift at the same amount before asking for an upgrade? And similarly, once the gift is upgraded, what is the appropriate amount of time before asking for another upgrade? The answer to both questions is simple: Know your donor. The sooner you meet the donor and learn more about them, the sooner you will have a sense of whether they like to be visited, whether they are giving to their capacity and cannot give more right now, whether they would rather make up their own mind about when and how to increase their gift, and so on.

Of course, you can't know all your major donors right away, and some you may never meet. When you don't know, follow this formula: Get the gift; the following year ask for a renewal; the third year ask for an upgrade. If you receive a larger gift after asking for an upgrade, ask for a renewal of that gift the following year, and the next year ask for a gift that is larger by one-third. Then repeat the cycle: For a couple of years ask for a renewal and then another upgrade, and so on. If the donor stays at the same level, keep asking for more unless you get information that the donor is giving as much as he or she can afford.

In addition to this formula, use common sense. If someone gives you \$5,000, you may need to wait to ask for a renewal for several years before asking for more. If someone gives you \$250, then ask them to double their gift. On the other hand, think twice before asking someone giving \$10,000 to double. You can always add the phrase "or more" onto any request you make if you really don't know how much more to ask for.

Of course, your organization must be able to justify needing more money, and that need must be expressed to the donor in a compelling way by putting it into programmatic terms. Hiring another staff person, for example, is not compelling; serving 20 more children (what the additional staff person is needed for) is.

The Hardest Year

In planning to add a major gifts component to your fundraising, keep in mind that the first year of recruiting major donors may be the hardest. Do not set your goals too high; you don't want volunteers to be demoralized by failing to reach an unrealistic goal. Major gifts solicitation can be done in the form of a campaign—that is, with a formal beginning and ending time, specific materials, and a special committee, or it can be an ongoing program, with different volunteers helping at different times.

The most important step to take in a major gifts program is to start. Even if you have only one prospect, ask that prospect. If the largest gift you can imagine someone giving is \$250, start by asking for \$250. A major gifts program builds on itself; simply establishing the groundwork for the program will begin the process of getting major gifts. ■

Kim Klein is the cofounder and publisher emerita of the *Grassroots Fundraising Journal*.



Connecting With the Humanity of Our Donors

By Paul Jolly

DEVELOPMENT EXPERTS HAVE LONG USED THE TERM “donor-centered fundraising” to identify a sustainable, growth-empowering approach to generating income. This is in contrast to activity-centered fundraising: galas, raffles, auctions, 5K runs, etc. So if you have donors, and those donors happen to be human, how do we honor that humanity?

Here’s the thing about humans: they move around. They are, at every juncture, either moving closer to, or drifting away from, your organization. The musings that follow are speculations, based on 25 years of cultivating relationships with donors, on factors likely to impact their movement.

My specialty is major gifts fundraising. So when I talk about developing relationships with your donors and prospects, I mean the people at the top of your giving pyramid. But the same approaches can be modified for other donors. Just keep in mind the need to prioritize your time so you spend most of your energy where it will do the most good.

There are three different kinds of challenges involved in keeping donors moving toward your organization: 1) institutional challenges; 2) personal challenges involving you, the fundraiser; and 3) personal matters in the life of the donor.

Institutional Challenges

Does your organization have clarity about your impact and your “mission gap”? Rob Sheehan coined the term mission gap to explain the difference between what your organization is able to accomplish with current resources, and the extent of the problem you are trying to solve. The more clarity you have about your organization’s mission gap, the better equipped you will be to get donors excited. For example, one of my clients is a leadership

training program for youth in poverty in Washington, DC. They serve 300 youth, and have determined that there are 1,500 candidates for their services. So closing the mission gap means growing the program from 300 to 1,500.

The more ambitious your aspirations, the harder it is to clarify your mission gap. If you are in the advocacy or social change fields, you will have to help your donors understand your work in two ways: by identifying intermediate goals, and articulating how those goals will lead to your ultimate goal. Suppose, for instance, that your intermediate goal is shining a spotlight on the failures of for-profit prisons, and your ultimate goal is reducing the number of Americans behind bars. You then have to help your donors understand the link between the corporatization of prisons and the number of people locked up.

Does everyone at your organization recognize this is a team effort? A fundraising staff person in a small or new nonprofit often works fairly independently. Sources like foundations, small annual donors, and event sponsors can be explored without a lot of engagement from the board or executive director. But as soon as major gifts solicitation becomes a strategy, the development staffer becomes a facilitator of fundraising, as well as a fundraiser. Fundraisers are, by temperament, optimistic and determined. But major gifts fundraising is something that can only be done with support from at least some board members and the executive director. And if the board and executive director believe that major gifts fundraising can be delegated like a hot potato, it is a formula for disappointment.

You don’t need a board composed of superstars in order for effective board involvement in major gifts fundraising. A few dedicated individuals can make a big difference. Many fundrais-

ers complain that their organization doesn't have "a fundraising board." It is common to assume that the loudest groaners represent the sentiments of the entire board. But it is seldom true. Over and over I have had conversations with fundraisers who roll their eyes when I ask about their board. But if I ask them whether there are two or three board members that could be partners in fundraising, the answer is usually yes.

Think of your board in three tiers. First, there may be those that "get it"—those who have fundraising experience or a natural talent, inclination or boldness. Second, there are those who are teachable. These are board members who might see another board member host a house party, and say, "I can do that." Third, there may be those who don't get it and never will. What to do about those individuals will become much clearer after the engaged and the engageable are actively involved in fundraising.

Is your organization on stable ground? Very few donors want to rescue an organization in trouble. If your organization is in a precarious situation, you need to figure out a viable plan for getting solvent. And your board members, and most dedicated long-time donors, are potential partners in the turnaround. When introducing your organization to new donors, keep in mind that they may be inspired to advance your mission and accomplishment, but they will likely not be inspired to keep your organization afloat.

Individual Challenges

Is your ideology getting in your way? With the income gap a yawning gulf between increasingly rich and increasingly poor, it makes sense for people in grassroots community organizations to be cautious about building alliances with wealthy donors. But remember, everyone's relationship with money is different. You don't have to abandon your critique of trickle-down economics to have a conversation with a prospective major donor. Just recognize that he or she is an individual—with all of the complexity that implies.

Do you have enough time? Rhetorical question—I already know the answer is no. I understand that you have too many tasks on your plate. But when people tell me they don't have time for major gifts fundraising, I encourage them to consider whether there might be other factors besides the speeding clock, including challenges related to:

- starting something new.
- investing energy in activity that is amorphous and essentially has no deadlines.
- changing organizational culture.
- picking up the phone and calling someone for the first time.
- facing rejection.
- "managing upward" as a fundraiser—in other words, providing guidance to your executive director.

If the problem is you don't have enough hours in the day, there are techniques for clarifying priorities and managing time. But if the problem is a mix of other factors, you can only overcome them if you are honest and incisive about what the real issues are.

Can you imagine things being different than they are? Fundraisers are, among other things, change agents. It really is possible for an organization to grow dramatically. It requires believing that donors can get excited about the organization's mission. It requires anticipating more powerful impact so you can describe it to donors. It requires refocusing development priorities so the most promising prospects for the largest gifts get the most time and attention. All three of these acts—believing, anticipating and refocusing—are acts of imagination. Give yourself space to imagine.

Donor Issues

Now, we get to the heart of the matter. What are the issues related to that unique, flesh and blood individual who signs that check?

Why does your donor give? Moving into the major gifts arena means less broadcasting and more listening. Sure, your organization does great work, but there is some personal connection that ties the individual donor to the organization. Exploring that connection is the heart of fundraising. Do your best to learn:

- how the donor became philanthropic.
- why the donor is committed to your cause and organization.
- about good experiences the donor has had as a donor.
- how the donor likes to be acknowledged and recognized.

If the questions are handled with some finesse (you don't want the donor to feel interrogated), it is an enjoyable conversation. People like to talk about themselves, particularly in light of their generosity. The gist of this exploration is, "How did you decide to give away money?"

What's the donor's favorite place in the parade? Some people like to be leaders and are delighted to create something new that other people will support. Some like to blend in and get involved in an endeavor after it has gained some momentum. And some don't give a hoot what other people do—they give for their own reasons. Whether a donor is a leader, a follower, or a maverick is a fundamental aspect of a successful philanthropic partnership.

What family dynamics influence the donor? If you get a personal check with two names printed on it, and one signature, that could mean a number of different things. Is it a couple that makes decisions jointly or separately? And where does the money come from? Did the donor inherit it, earn it, or marry into the fortune? Does the donor want to teach their children about philanthropy? If the money comes from a family foundation, does each board member get to decide what to do with their slice, or are decisions made together? All these questions have a big impact on how the

donor gives. You will not be able to successfully solicit a big gift if you don't know the answers.

Does your donor want to get more involved? If you invite a donor to attend an event or volunteer, they may say they are too busy. That could mean they will always be too busy, but it could mean simply that you were asking too much of them at this particular phase of the relationship. As you get further down the road of engagement, keep looking for ways to draw them closer to the organization.

How does the donor want to be involved? Is there a way that particular donor can help? If you can harness your donor's special gifts, they will have a hard time saying no. For instance, if you have a donor who is an unconventional thinker, you could tell them, "You are a great visionary, and we need that kind of creative thinking. We have drafted a plan for a new program. Would you be willing to look it over, and give us your candid feedback?" The donor will probably say yes. As you are getting acquainted with the donor, one of your goals is to identify the talents and skills that define their life purpose.

How does your donor want to be thanked? One group I work with is a neighborhood arts organization. One of the highlights of their development program is a circle of donors who make a three-year pledge of \$1,200 or more. Every year, one of their resident artists creates a piece that is used as a gift for those donors. It could be a piece of jewelry, pottery, or a small painting. In general, I am not a fan of offering tangible "benefits." If you offer benefits to your donors, then the acts of gift-giving and receiving become an exchange. But this is different. It is a personal, powerful reinforcement of the connection between donor and organization. If you can easily do something that intimate, it might help you. Otherwise, focus on intangibles. A sense of being on the inner circle is very powerful. Trite objects run the risk of cheapening it.

How can you communicate impact to your donor? One of the most delightful moments in a fundraiser's life is meeting with a donor to share what their gift has accomplished. In the case of a large gift, this is a discussion of the donor's individual impact. For smaller gifts, it's identifying the donor's role in collective impact. This is different than saying thank you. It is naming for the donor how that gift made the world better. If you can get in the pattern of thanking donors, pointing out the impact of their support, and explaining new opportunities, your retention rate will skyrocket. Why would a donor not continue to support an organization that gives them that invitation to make a difference?

What is the donor's social network like? Most often my role is to encourage cautious people to be bold. But in the case of asking donors for names of prospects, a degree of caution is appropriate. Remember, your donor is a human being. And most of the donor's friends are human too. The too-common question, "Do you know

anyone else that might support this organization?" leads almost inevitably to a quick negative answer. People tend to be protective of their friends. So if you ask the donor for people to solicit, that protectiveness comes to the fore. Instead, consider these factors:

- *Is the donor really excited about the organization?* No one wants to invite other people to get involved in something they feel lukewarm about.
- *How can you invite the donor to share their excitement about your organization with associates in a solicitation-free environment?* Learning about a new organization and deciding to make a contribution are two different exercises. Don't ask the prospect to do both at the same time.
- *How can you assure the donor that their friends are not going to be asked prematurely?* Try saying something like, "Are there people you want to invite to an open house who might make a contribution if they get excited about the organization?"
- *Is the donor an introvert or extrovert?* Some people will be happy organizing an event for a crowd, but others prefer to do introductions one-on-one.
- *What kind of follow-up are you going to offer to ensure new names don't get lost in the shuffle?* It does not help your organization to go from planning one event to the next if prospects appear and disappear in the process. Slow down and block off time after the event to ensure you can solidify relationships.
- *What role does the donor want to play in eventual solicitation?* Don't assume that the donor will solicit gifts from their friends on your behalf. He or she may prefer a supporting role or no role at all in that conversation.
- *If someone puts you in touch with a prospect who eventually makes a gift, celebrate with the introducer.*
- *If the relationship gets stuck, ask the introducer if they can give you some insight about how to get it unstuck.*

But before you do any of these things, ask yourself if you need more donors. It may seem like a silly question, but the reality is that bigger gifts result from good donor stewardship and thoughtful solicitation. If you are not doing exquisite stewardship and solicitation of current donors, that's the place to start. Adding more high capacity individuals to the ranks of the bruised or ignored is not going to solve your money woes.

All of these emotional dynamics are unearthed through one-on-one conversations. If it exhausts you to think about giving that kind of individual attention to your human donors, choose the highest capacity individuals who are closest to your organization. And if you need a context for starting those conversations, consider these opportunities:

- *When you are new at the job.* If you are a new fundraiser or executive director, this is a great time to get acquainted with the people who support the organization.
- *When a donor makes a gift.* People feel great right after making a gift. If you can reach them during that window to thank them for their support, follow the appreciation with something like, “If you have a minute, I would love to find out a little more about what motivates your support.”
- *Donor appreciation week.* Call donors and tell them, “We have set aside time this week, and several board and staff members are contacting donors to express appreciation.”
- *When a big campaign is coming up.* Fundraising lore would have us believe that the beginning of a capital campaign is the “quiet phase” when donors read a case statement and offer feedback. But a successful campaign starts long before that. A successful campaign is going to grow out of informal conversations and brainstorming sessions about what would allow the organization to more effectively tackle its mission gap. It’s never too early to start those conversations with your inner circle of supporters.

Remember Your Own Humanity

We have established that your donors are human beings. And we have discussed many variables that determine whether they are moving toward or away from your organization. But since you are also human, it is important to be aware of your own motivations. What gives you energy? Are there colleagues you love working with? Are there board members that you get jazzed by? Are there donors that you have fun hanging out with?

The fundraising textbook describes how to identify promising prospects. But make sure you reserve some of your time for donors who inspire you. I am not suggesting that you necessarily become friends with donors, but think about the donors who can be your partners in envisioning the organization’s future. Invest time in those relationships. It will be good for you, good for the donor, and good for the organization. ■

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JACK HUI LITSTER, INTER PARES

Jack Hui Litster with his friend and long-time Inter Pares major donor

Surveys and Segments Building Your Major Donor Strategy

By Jack Hui Litster

DEEPENING RELATIONSHIPS with 275 people I've never met? Where to begin? When I started in major gifts fundraising at Inter Pares in 2013, I needed to build and maintain relationships with a group of 275 major donors spread out across Canada, from St. John's Newfoundland to Vancouver Island, British Columbia (over 4,500 miles apart). I was worried that it would take me years to get to know the individuals who make up such a large and diverse group. I have now spent over two years in this role, and I'm happy to say, this broad group is starting to feel like a community.

Inter Pares is an international social justice organization with a single office and 15 staff in Ottawa, Canada. We raise funds to support the human rights work of over 100 counterpart organizations working in Asia, Africa and Latin America. For many years we have had a relationship-based approach to fundraising. All staff recognize the importance of donor stewardship. When fundraising staff, program staff, and board members are traveling in Canada, or on a layover en route to Asia, we try to meet donors whenever possible. So when I began work, our fundraising database already contained useful notes from visits with our major donors. Nevertheless, in 2013 we had only met about one-third

of our major donors in person. We still have work to do in this respect, but as of summer 2015, we have met over 60 percent of our major donors. In this article I will share the strategies I have used with my colleagues at Inter Pares to prioritize our time and energy in really getting to know our major donors as individuals.

Step 1: Scoring Our Major Donors

To begin creating a more manageable caseload of major donors, I knew I had to scale back the group. My first step was to use the Recency Frequency Longevity Monetary (RFLM) scoring system to compare individuals in the major donor caseload. This system, which I learned at a workshop given by Ted Hart at an Association of Fundraising Professionals Congress in Toronto in 2013, allocates a score out of 100 to each of your donors based on how recent their last gift was, how often they have made donations, how many years they have been supporting the organization, and the size of their largest gift. Extra points are allocated for high total lifetime giving amounts.

By applying this RFLM scoring system to each person in our caseload of 275 donors, we were able to identify our strongest

major donors, and from there we could choose who to include in a caseload of 150 major donors. Richard Perry and Jeff Schreifels' recent book, *It's Not Just about the Money: Building Authentic Major Donor Relationships*, talks about building a strong caseload of 150 major donors. Having a caseload this size made our major gifts program strategies much more manageable.

Step 2: Survey Says...

Within six months, I was able to gather an extensive amount of useful information on the following: how our major donors view our work; who is open to being asked for a special gift; who would like to be visited; who is interested in getting involved in other ways like volunteering; and much more.

I created a five-page survey for our major donors, which we sent out to our 150 major donors. The two-page cover letter talked about our changing funding context and our rationale for wanting to gather this kind of information through a survey. The letter also gave some examples of exciting new fundraising and public engagement strategies we were working on. The survey included questions such as:

- Inter Pares and our counterparts concentrate on six specific themes of work, across four regions. Which themes and regions interest you most? (multiple choice options)
- What motivates you to support Inter Pares? (multiple choice options with space for comments)
- Is Inter Pares one of your favorite charities? (multiple choice options with space for comments)
- Do you feel that you receive enough information on how your donations are used by Inter Pares? (comments only)
- Is your relationship with Inter Pares stronger or weaker than the relationships that you have with other organizations that you support? How can Inter Pares improve? (comments only)
- Would you be interested in meeting with Inter Pares staff at some point in the next few years to discuss making a special donation? (multiple choice options with space for comments)

We received an amazing response: 90 surveys were returned out of 150 mailed. I would attribute this response rate to a few factors:

- We used lots of personal touches on the surveys, including live signatures from both our executive director and board chair on each cover letter.
- The end of the cover letter had a box with the text: "Would you like to get in touch with us about any of the issues raised in this survey? We are always happy to hear from you." This was followed by the email addresses and direct phone num-

bers for our two fundraising managers and our executive director.

- We have not done surveys of this kind to our donor base before, so it may have felt like a new opportunity for engagement.

From the rich detail in the comments sections of the survey responses, we compiled a 22-page document of words of encouragement, suggestions for new ways to engage with our supporters, and clear ways to articulate what donors appreciate about our work. Now we often refer back to these comments to rediscover clear ideas for how to describe what our donors like about our work, using their own words.

Step 3: Creating Segments of the Major Donor Caseload

One of the most useful outcomes of the survey was the idea of creating segments. Around the same time that these survey responses were being returned, we had a phone call to discuss our major gifts program with former Inter Pares board member and fundraising veteran Delyse Sylvester. She raised the idea that Inter Pares could create profiles of our major donors and treat those segments in a particular way based on their characteristics. Delyse suggested that we look for the characteristics that differentiate our major donors and try to identify five or more common profiles within our major donor caseload.

When Delyse first proposed this strategy, my immediate reaction was: *We have barely put together a single coherent strategy for our 150 major donors. I can't imagine trying to juggle five different strategies for subgroups of major donors. There just aren't enough hours in the day!*

But the more I thought about it, the more I realized that creating different segments of our major donor base would actually be incredibly useful and informative. It would help us develop outreach strategies that made sense for each major donor as an individual with particular characteristics, rather than a major gifts fundraising strategy that treats everyone the same. Up until that point I had been mostly operating under a loosely coherent major gift mantra of: Be clear about who your major donors are, and then pay more attention to all of them. More cards! More phone calls! More visits! But as I started to read the responses from the surveys, I began to see that just because 10 different people make large donations to our organization, they don't necessarily all want to have the same kind or amount of attention from us.

As I entered the survey data into our database of donor records, I started seeing patterns emerge right away. There were surveys that came in from current or former board members and close friends in the sector. These are people that we already knew well, and because of these deeper relationships, we were already

Our Five Segments Up Close

The Close Ally:

Profile: They are current or former Inter Pares board members, past participants in our Solidarity Tour to Guatemala, or close friends of Inter Pares who also work in our sector.

How to keep in touch: Close allies are usually interested in detailed conversations by phone or email with staff about ideas for new programs or the context we are working in. They appreciate thoughtful, personalized stewardship that can have a conversational tone.

Ideas for developing the relationship: They will be interested in and sometimes will attend Inter Pares public events and small gatherings, and they are interested in meeting overseas counterparts. They may be open to hosting or co-organizing Inter Pares donor gatherings. Some of our close allies could be approached for special major gift asks.

The Best Friend:

Profile: They feel a connection with Inter Pares on a spiritual/emotional level. Inter Pares is possibly their favorite charity. They feel good knowing that organizations like Inter Pares exist.

How to keep in touch: They are happy to read detailed information about the work of Inter Pares and our counterparts because they are sincerely interested in knowing more.

Ideas for developing the relationship: Most, but not all, are

happy to meet with Inter Pares staff. They would attend Inter Pares events and would be interested in being ambassadors to share information about Inter Pares' work with friends and family. They may not necessarily want to organize a donor gathering. If the timing was right for them, they would likely make a special major gift to Inter Pares if asked.

The Working Professional:

Profile: They tend to live in large cities, and many are university professors or doctors. They tend to be busy, middle-aged people who have little spare time or energy to engage further with Inter Pares.

How to keep in touch: Create straightforward and punchy stewardship, ideally no more than once or twice per year. Do not try to call and thank for a gift because they don't have time to take phone calls.

Ideas for developing the relationship: Be honest about whether these individuals actually want a relationship with Inter Pares. For them, while the idea of attending events or meeting Inter Pares staff or board members is vaguely of interest, it is rarely possible given time constraints. Do not approach them for a special gift, unless the individual has indicated that they would be interested in such a discussion.

treating our outreach with them differently from the rest of the major donors. Their surveys included comments like: "We are happy with our relationship with you. We would be interested in arranging/supporting conversations to discuss the political context and deepen our collective analysis," and, "As you know, there are a few charities of which Inter Pares is one that I support every year without question." I called this segment the "close allies."

There were also the surveys that, when I read them, I could feel the donors' emotional connection with Inter Pares in the way they spoke about what our work means to them. These are the people who stated unequivocally that Inter Pares is their favorite charity. They made comments like: "I love what you do, enjoy reading the bulletins, appreciate the thoughtful, handwritten notes, and am glad to be able to contribute. Keep up the great work—bringing an alternative voice and vision to a too-uniform world." Because of the depth of their affinity, we call this segment the "best friends."

Then there were university professors and doctors, for example, who made comments like "I really don't want to spend too much time on the organizations I support. I don't have time, but I do have a commitment to contributing somehow." These became the "working professionals" segment.

I also read surveys from the more business-minded major donors who were particularly interested in low spending on overhead. They are often seeking more information so they can evaluate our projects and analyze our budget. Their survey comments included, "I find it difficult to sort out your costs of operating, travelling, etc. I realize that there may be some co-funding involved." This group perhaps sees their donations as a form of philanthropic investing, so I called them the "investor-donors."

The last segment we identified included long-time generous supporters who made clear comments like, "We're on a pension and well into our 80s." They asked for less mail and said they were not interested in meeting with Inter Pares staff or being asked for a special donation. This segment we identify as "the elders."

How Segments Influence Our Approach

Our first opportunity to put strategies into practice for the different segments came at the end of 2014, when the Inter Pares fundraising team usually sends a card to each of our major donors to thank them for their support this year. In past years, we would send everyone the same card (a monotonous experience—we would create a stock message to write in the card, and a num-

The Investor–Donor:

Profile: Business- and community-minded, they are interested in tangible international development initiatives like microfinance. They support many charities annually, and while Inter Pares is not among their top five charities, they still make a generous gift once a year.

How to keep in touch: They may read our quarterly newsletter and particularly the financial statements in our annual report. When communicating with them in a more personal and individualized way, we need to be conscious of not appearing to spend too much staff time and resources on building the relationship. Investor-donors are conscious of ideas like value for money and might be disappointed by receiving long handwritten cards, large personalized mailings, or extensive phone calls. They would see such efforts as wasteful, preferring that as much as possible their donation dollars be spent on the programs, not on donor stewardship.

Ideas for developing the relationship: The investor-donors are somewhat indifferent to engaging further with Inter Pares. They would not go out of their way to attend an Inter Pares event. If they visit with staff or board members, they would take the time to think of a number of questions to ask. They would consider making a special major gift, but would want a clear budget and an explanation of the results that their gift could achieve.

The Elder:

Profile: The elders in our major donor caseload are retired and over age 75. Many of them live very frugally. Throughout their lives they have been connected to environmental and peace movements. They have a nuanced analysis of social justice. Some of the elders in our major donor caseload live in nursing homes. Over their lives they have supported many charities, but at this time they are beginning to cut back and want financial decision-making to be simplified.

How to keep in touch: Our elders are probably interested in a good conversation with staff about issues of interest. Sending cards and information about programs also works well. Thank you phone calls might be welcome, but only if they have had some personal communication with Inter Pares in the past.

Ideas for developing the relationship: The elders have free time, but not a great deal of energy for further engagement with Inter Pares. Many of them are unlikely to attend an Inter Pares event or gathering, but they may be interested in meeting with staff. They are not interested in making a major gift at this stage in life, other than a bequest. They have likely decided many years ago whether to include bequests in their will, and if so, they have already chosen which ones.

ber of staff would each handwrite dozens of cards with little or no personalization). Instead, this year we sent smaller batches of five different kinds of year-end messages to our five segments. Coordinating these five different packages took some planning: I determined who would get which package in the summer and made a timeline to roll out these different approaches one at a time between early November to early December. Creating and sending all these packages was made possible with the support of six of my staff colleagues and three of our board members.

The 27 close ally donors each received a personal email from our executive director with details of three exciting recent activities at Inter Pares that had not yet been shared with supporters in our direct mail or e-newsletter streams. I think this came across as a refreshing personal contact from someone in a leadership role at Inter Pares, with details of our work shared in an informal, conversational way. It hopefully helped our close ally donors understand they are part of the inner circle of our organization. One of our close ally major donors wrote back to say how much they appreciated this year-end email from our executive director, and how it was one of the most honest and authentic communications pieces he had ever received from a charity.

The 35 donors in the best friend segment received an email trip summary with photos from programs overseas, sent by program staff who had travelled overseas in October and November 2014. The email gave specific examples of the kind of work that our major donors are supporting. Since it was shared using a simple person-to-person email without any fancy formatting or special effort but clear details and photos, I thought it would be appealing to the major donors in the best friend category. This group appreciates the personal connection of an individualized email sent from a program staff.

For the 26 working professional donors, we did not send an additional mailing, but we personalized a December year-in-review newsletter that they would have received anyway at that time of year. This way, a busy person does not receive one direct mail newsletter and a separate handwritten card in December at an already busy time of year, but instead receives one in-house mailing with a newsletter and a simple card with a handwritten message thanking them for their support.

For the investor-donors, we sent out 36 cards that demonstrated the impact of their support. The investor-donors received a simple package with a card and two photos from a recent learn-

ing exchange that Inter Pares had coordinated for farmers from India and West Africa. The card gave details of the exchange and thanked the donor for helping to make those kinds of activities possible through their ongoing support.

For the 25 elders in our major donor segment, we sent cards handwritten by a board member that said why they like being on our board and shared one highlight from Inter Pares' activities in 2014.

Does Segmenting Improve Relationships and Revenue?

Compared to our previous one-size-fits-all strategy for year-end stewardship from the previous five years, we saw our year-end revenue from our major donors increase by eight percent when we used a segmented strategy in 2014. It's a new strategy that we will continue to refine and build into our communications and outreach with major donors throughout the annual cycle. But I feel these segments will help inform our strategy moving forward, and the segmented system will continue to present new ideas for creative ways to develop relationships with these manageable subgroups of our major donor caseload.

We have also been able to use the segments to help create a shortlist of donors who have high RFLM scores and also value having a relationship with Inter Pares (the close ally and the best

friend segments in particular). The segments, and this shortlist, have also been very useful in determining who in our major donor caseload may be ready to be asked for a special gift. Our team has made six asks in 2015 to individual major donors that we have been cultivating from our best friend, close ally and investor-donor segments. We have received over \$80,000 as a result of these asks. Compared to 2014, that's a five-fold increase of revenue from major gift asks.

In the space of two years, we have gone from trying to juggle relationships with 275 major donors, to a cohesive, strategic system of developing closer relationships with 150 major donors. And we did all this thanks to two fairly straightforward steps: a survey and some segmenting.

The relationships in our lives help define our path, our perspective, and our outcomes. So with a job like major gifts fundraising where building many relationships is central, we need to be prepared to build those relationships correctly. ■

Jack Hui Litster is one of two fundraising managers at Inter Pares, an international social justice organization based in Ottawa, Canada. Jack's focus is engagement with major donors and legacy donors, and coordinating relationships with foundations. For more information, visit interpares.ca

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