

HOW TO RAISE MAJOR GIFTS

The Right Way

Unlocking the Potential for Your Nonprofit

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Speaker Bios

Dr. Adrian Sargeant is Director of the Centre for Sustainable Philanthropy at the University of Plymouth and Adjunct Professor of Fundraising at Indiana University, Bloomington. He is also a Visiting Professor of Fundraising at Avila University in Kansas City and at the Australian Centre for Philanthropy and Nonprofit Studies at Queensland University of Technology in Brisbane, Australia. He is widely regarded as one of the world's leading fundraising academics and was named in 2010 in the United States to the prestigious Nonprofit Times, Power and Influence list.

Amy Eisenstein, MPA, ACFRE is an author, speaker, and board retreat facilitator. Her published books include: *Major Gift Fundraising for Small Shops*, *Raising More with Less*, and *50 ASks in 50 Weeks*. She became an AFP certified Master Trainer in 2009, and is a frequent speaker at nonprofit conferences. Amy currently serves as the President of the Board of the AFP - New Jersey Chapter. She became a Certified Fundraising Executive (CFRE) in 2004 and received her advanced certification, ACFRE, in 2013. For Amy's video blog, visit amyeisenstein.com.



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Major Gifts Challenge!



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Can small and mid-sized nonprofits
really raise major gifts?



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Participating Organizations

Operating Budget of
\$10 Million or less



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POLL

- A. Budget Under \$1M
- B. Budget between \$1M - \$4.9M
- C. Budget between \$5M - \$10M
- D. Budget over \$10M



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Lead Sponsors



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Study Process

- ✓ Literature Review
- ✓ Interviews
- ✓ Survey (662)



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Respondents by Budget Size

	Frequency	Percent
\$5m - \$10m	93	14.0
\$1m - \$4.9m	233	35.2
Under \$1m	336	50.8



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Respondents by Category

Category	Percent
Human Service	27.8
Education	17.9
Arts and Culture	10.5
Health Services/Medical Research	10.5
Nature/Environmental protection	4.6
Religious and Spiritual	4.3
Public Society – Advocacy Group	2.8
Animal Rights / Animal Welfare	2.5
Sports and recreation	2.5
International dev. / Emergency relief	1.2
Human Rights	1.1
Other	14.4

Findings



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Mean Contribution of Each Form of Fundraising to Total Donated Income

Category of Fundraising	Mean %
Direct Response Fundraising (e.g. direct mail, advertising)	18.7
Digital Fundraising (internet, email, social media)	4.6
Fundraising Events	18.8
Major Gift Fundraising	13.9
Corporate Fundraising	7.3
Grants from Foundations	18.0
Grants from Government	8.5
Bequests and Planned Giving	3.2
United Way	1.8
Other	5.2



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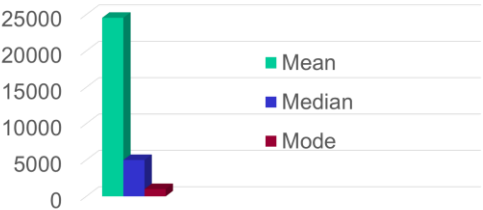
FTEs Employed in Fundraising

	Mean FTEs
\$5m - \$10m	5.5
\$1m - \$4.9m	2.8
Under \$1m	1.2



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Major Gifts Defined



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How \$ Value of Major Gift is Decided

	Number of Orgs	Percent
Professional Judgement of DOD	215	55.6
A Fixed Amount Agreed w/ Board	65	16.8
A Multiple of our Average Gift Size	58	15.0
A Percentage of our Overall Charitable Income	9	2.3
Other	40	10.3



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Number of Fundraisers Employed to Work on MG

	Mean	Mean Total FTEs
\$5m - \$10m	3.2	0.9
\$1m - \$4.9m	2.5	0.5
Under \$1m	2.1	0.3



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Number of Volunteers Engaged to Work on MG

	Mean	Mean Total FTEs
\$5m - \$10m	5.3	0.4
\$1m - \$4.9m	4.5	0.3
Under \$1m	4.6	0.3



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Pipeline

	Mean Cultivated for 1 st Gift	Mean Stewarded for 2 nd and subsequent gift.
\$5m - \$10m	30.7	52.5
\$1m - \$4.9m	33.2	45.0
Under \$1m	14.0	17.0



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Major Gift Fundraising Performance


	Mean Total MG Revenue	Mean Number of Gifts	Mean Net Revenue	Mean Net Revenue per Staff Member
\$5m - \$10m	1,183,718	146	1,024,400	406,997
\$1m - \$4.9m	406,792	43	354,768	155,569
Under \$1m	93,934	25	69,964	45,030



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Fundraising Metrics

Metric	Percent
Dollars raised in revenue	83.0
Number of new gifts	52.9
Donor engagement or commitment	41.3
Gifts size or average gift size	39.1
Success rate in solicitations	31.7
Number of meetings attended with prospects	31.7
Donor satisfaction w/ quality of service we provide them	28.5
Number of solicitations made	27.6
Donor satisfaction with the impact of their gift on cause	27.2
Return on investment (in past year)	17.6
Number of personalized gift proposals made	17.6

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Training/Education

Development Activity	Percent
Online training tools/webinars	56.4
Ad hoc or occasional training	54.5
Attendance at local conferences	47.4
Mentoring by a member of your organization's team	25.3
Attendance at a major conference (e.g. AFP Intn'l)	23.7
Mentoring by an external consultant or fundraiser	22.4
Support to certify as CFRE, ACFRE or FAHP	11.2
Support to study a formal course on fundraising (e.g. from a local university)	10.6

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Regressions

Total Income from Major Gifts

- Training/Education
- Number of FTEs
- Number of Pipeline Prospects – First Gift
- Number of Prospects – 2nd and Subsequent



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Number of Gifts

- Tenure
- Good IT
- Number of Pipeline Prospects – First Gift
- Number of Prospects – 2nd and Subsequent



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Income Per Staff Member

- Rating of pipeline
- Number of Pipeline Prospects – First Gift
- Number of Prospects – 2nd and Subsequent



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Cultural Correlations



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Correlation of Attitudinal Statements with Total Income from Major Gifts

	Correlation Co-efficient
Organizational planning regularly includes consideration of the creation of appropriate gift opportunities	.212**
How long have you been working in your current role	.150**
In our organization we have an inventory of major gift opportunities at each gift level	.150**
I regularly liaise w/ my peers in other functions to discuss how we can work together to secure success in FR	.144**
The interests and aspirations of our donors is a topic regularly discussed by our senior mgt. team and Board	.129*
Volunteers are actively involved in the cultivation, solicitation and/or stewardship of major gift prospects	.123*
We are always seeking meaningful donor involvement activities	.119*

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Correlation of Attitudinal Statements with Net Income from Major Gifts

	Correlation Co-efficient
Organizational planning regularly includes consideration of appropriate gift opportunities	.236**
I regularly liaise w/ my peers in other functions to discuss how we can work together to secure success in FR	.181**
In our organization we have an inventory of major gift opportunities at each gift level	.176**
Volunteers are actively involved in the cultivation, solicitation and/or stewardship of major gift prospects	.167**
How long have you been working in your current role	.164**
I have one or more fundraising Champions (or advocates) I can rely on, on our Board	.157**
How long have you been working in your current role	.150**
The interests and aspirations of our donors is a topic regularly discussed by our senior mgt. team and Board	.145**
In our organization donor stewardship is seen as everyone's responsibility	.131*
Our fundraising team members are empowered to be responsive to donor needs	.120*

Correlation of Attitudinal Statements
with Number of Major Gifts Received

	Correlation Co-efficient
We have good It systems in place for managing donor relationships	.133*
We have dedicated software to assist us in major gift fundraising (e.g. Bloomerang)	.123*
In our organization donor stewardship is seen as everyone's responsibility	.119*
I regularly receive information on potential donors from others in the organization	.116*



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Correlation of Attitudinal Statements with
Major Gift Income per Staff Member

	Correlation Co-efficient
Organizational planning regularly includes consideration of the creation of appropriate gift opportunities	.179**
I regularly liaise with my peers in other functions to discuss how we can work together to secure success in fundraising	.130*
We are always seeking opportunities for meaningful donor involvement	.115*
Volunteers are actively involved in the cultivation, solicitation and/or stewardship of major gift prospects	.114*
How long have you been working in your current role	.111*
In our organization we have an inventory of major gift opportunities at each gift level	.109*



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Recommendations

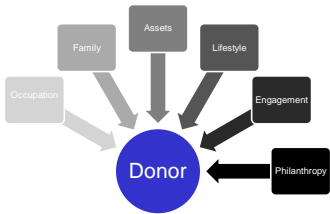


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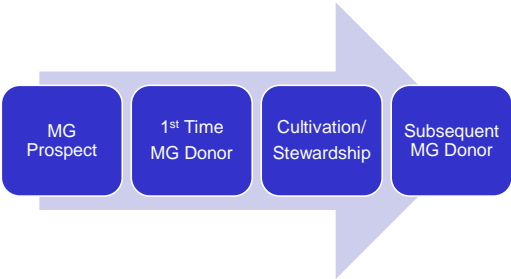
Pipeline



Prospect Research



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Tenure



Staff Time



Major Gifts Challenge







Development Team Meeting

Weekly Agenda Items:

- ✓What did we do this week to raise MG?
- ✓What will we do next week to raise MG?



**Keep it Short:
Have a Stand-Up Meeting**



**You can bring your coffee,
but you can't sit down.**



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**Board and Volunteer
Engagement**



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Provide Ongoing
Training & Discussions

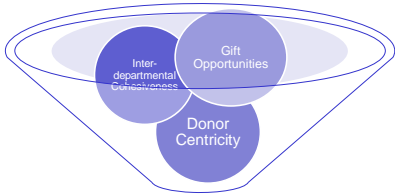


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IT Systems/Technology



Institutional Readiness/Culture



Major Gifts



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Metrics



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**Long
Term**

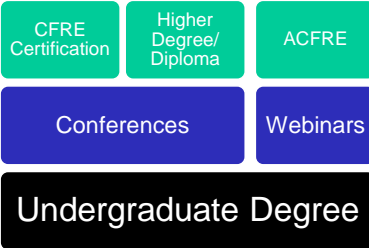


**Short
Term**



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Training and Education



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Can small and mid-sized
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For the executive summary and full report, visit



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Thank You!



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