

Fundraising Essentials: Successful Donor Visits | 04.04.2017

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Please find a list below of additional resources from the “*Fundraising Essentials: Successful Donor Visits*” webcast. If you wish to print only certain resources, you may click their respective links to jump directly to them in the packet.

Pre-Webcast Resources

1. [Major Gift Timeline + Strategy Outline](#) – Pages 2-3 - A collection of major gift statistics and sample timelines of major gift cultivation and solicitation.
2. [Strategy Template](#) – Page 4 - A guide to outline the strategy for your prospects.

Post-Webcast Resources from Academic Impressions

Book recommendations:

[Productive Conversations with Donors: A Handbook for Frontline Fundraisers](#)

[Writing Meaningful Contact Reports: A Handbook for Fundraisers](#)

Other Fundraising Essential Webcast Series sessions:

[Fundraising Essentials: Making the Cold Call](#)

[Fundraising Essentials: Making the Ask](#)

[Fundraising Essentials: Perfecting Moves Management](#)

[Fundraising Essentials: Donor Relations for Frontline Fundraisers](#)

FUNDRAISING ESSENTIALS: SUCCESSFUL DONOR VISITS

Resource: Major Gift Timeline + Strategy Outline

Key Facts and Figures: Major Gifts Take Time

- Data from 12 large public schools, gifts of \$1,000-\$50,000 in a given year
 - On average, it took 13.2 years for a donor to make his/her first \$1,000+ gift
 - Those who gave \$1,000+ in FY2009, gave about 73% of the years that they were on file
 - 57% of them made a first gift less than \$100
 - However, the higher the first gift, the quicker they became one of these donors
 - Of those that eventually gave \$1,000+, a \$100 first time donor did so at about a 30% faster rate than a \$1-24 dollars donor
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Strategy Outline 1: MOVE OR UPGRADE YOUR DONOR

- **June 2017:** KDD to research patient-centered models, and put together loose case statement (not for donor, but to focus Dan and KDD)
- **July 2017:** Dan Jones and KDD to meet with Dr. Smith to discuss different models, and ask her where she wants to have greatest impact
- **August 2017:** Extend invite to Dr. Smith to September Cardio Information event
- Refine proposal and next steps following meeting with Dr. Smith

Strategy Outline 2: OCCASIONAL DONOR

- **Quarter 1**
 - Discovery call from a student – if they won't take your call, or that of an administrator, maybe they will respond to a student (if no success in call, send personalized donor survey)
 - Personal stewardship piece sent outlining the impact of their support and demonstrating tangible impacts of philanthropy
- **Quarter 2**
 - Personal invitation from Dean to area of interest identified in the discovery call. If no contact was made, extend invitation to Dean's Roundtable or thought-leader panel event.
 - Send personalized update on key program, initiative, faculty member, etc... Express thanks that his support helps to make this type of progress possible.
 - If contact has been made personally solicit for leadership annual gift (if not already complete)

- **Quarter 3**
 - If unresponsive, personal invitation from volunteer/dean for tour of new courtroom, classroom, legal clinics, etc...
 - Send article of interest based on line of work or identified interest

- **Quarter 4**
 - If unresponsive, invite to athletics event

Strategy Outline 3: THE NOT-PROPERLY-ENGAGED DONOR

- Strategy redefined in fall 2015 that includes focus on relationship (both at institution and locally), impact of giving, and opportunities for future involvement
- **November 2016:** detailed letter of 20 years and impact sent to trustees
 - Follow up phone call made from director two weeks later (stewardship/relationship building)
 - Invitation for local trustee for lunch and tour (accepted in February 2013 after 4 outreaches; two via phone, two via e-mail)
- **March 2017:** greeting by favored staff member, lunch with director and development, BTS of facility. Key goal, ask local trustee to contact decision maker trustee to request meeting
- **May 2017:** complete stewardship book, that includes 20 years of photos, quotes, impact
- **June 2017:** present book to trustee
- **July 2017:** trustee visit in Texas
- Outline next steps as appropriate

Leaving a lasting mark on higher education

FUNDRAISING ESSENTIALS: SUCCESSFUL DONOR VISITS

Resource: Strategy Template

Prospect Name:	
Giving History:	
Opportunities/Desired Outcomes:	
Key Players/Roles:	
Discussion Points:	

Immediate next steps 30-60 days:

Date	Objective	Owner	Stage

Timeline:

Date	Objective	Owner	Stage

Fundraising team/Key Player	Title	Role