

Fundraising Essentials: Perfecting Moves Management

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Please find a list below of additional resources from the *Fundraising Essentials: Perfecting Moves Management* 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. [Written Strategy](#)– Pages 2-3
2. [Questions and Chat](#)– Pages 4-5
3. [Portfolio Chart](#)– Page 6

FUNDRAISING ESSENTIALS INSTITUTE

Session: Moves Management***Resource: Major Gift Timeline*****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 2015:** KDD to research patient-centered models, and put together loose case statement (not for donor, but to focus Dan and KDD)
- **July 2015:** Dan Jones and KDD to meet with Dr. Smith to discuss different models, and ask her where she wants to have greatest impact
- **August 2015:** 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 2013 that includes focus on relationship (both at institution and locally), impact of giving, and opportunities for future involvement
- **November 2013:** 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 2014:** 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 2014:** complete stewardship book, that includes 20 years of photos, quotes, impact
- **June 2014:** present book to trustee
- **July 2014:** trustee visit in Texas
- Outline next steps as appropriate

Questions and Chat

- Monica Manley: Please submit all questions for Kathy here.
- Biola: It would be interesting to know the average size of most MGO portfolios. What do you consider ideal?
- Al Gwen: The book Kathy mentioned on contact reports:
- Al Gwen: <http://www.academicimpressions.com/writing-meaningful-contact-reports-handbook-fundraisers>
- Marie Miami University: What specific tracking tools do you use for a written plan? on line, hand written etc- data base?
- Monica Manley: What probing questions have worked well in your experiences with prospects and donors?
- University of South Florida: What would you like to accomplish with your assets that would be meaningful to you?
- New Mexico State University: What interactions do you have with the university
- University of California, Santa Cruz: Why did you stop making annual gifts?
- Suzanne Dell-St. Clair: What is a favorite memory of your time as a student at?
- Margaret Babbitt: You are surely asked by many organizations for support, why have you chosen us?
- Point Park: What about the mission/visions/program excites you the most?
- University of California, Santa Cruz: Of all the great causes out there, why are you giving to us?
- University of Maryland Baltimore: Regardless of gift size, what was your most impactful gift?
- Mark Dorgan: Where does our organization fit into your philanthropic priorities?
- Felician University: How would you like to discuss your future investments in our University?
- University of Oregon 2: When you think of your affinity to our university, do you feel closer to the department, Athletics (football team) or the university as a whole?
- Suzanne Dell-St. Clair: If money were no object, what would you like to see happen with your philanthropy? What is your dream?
- University of Cincinnati Foundation: What type of relationship/engagement would you like to have with UC?
- Tara: How do you see your relationship with the university evolving?
- Suzanne Dell-St. Clair: What inspired you to make that gift?
- Natalie: What are you passionate about? What was your most meaningful experience at our institution?
- Marie Miami University: What impact would you like to accomplish?
- UT Chattanooga: If you had an unlimited supply of money (win the lottery), what would you do with it?
- JeffD: With your participation being so loyal and reliable over the past XX years, what do you feel is the next step in your philanthropic relationship with AU?
- Carleton University: how can we see Jim Langley's research on number of attempts?
- University of California, Santa Cruz: Is the time until first \$1K gift 11 years post graduation/involvement with the org or 11 years after their first donation; 11 years after first participation/interaction?
- University of California, Santa Cruz: Number of attempts (11) over what period of time?

- University of Idaho: Can we access a template of the written strategy doc Kathy is mentioning?
- Cathy Sweet: Does this strategy change depending on capacity?
- Bentley University 2: Could we get a copy of the Portfolio Chart doc/spreadsheet?
- Carleton University: whose responsibility is ongoing stewardship for large donors? DR or the Development officer?
- University of Miami: Can you provide an example re: making sure the next outcome is clear to all?
- New Mexico State University: Reconnecting alumni with mentors
- University of Waterloo: Photo of something they've supported or a pic of them at an event and put in a UW frame
- Northwestern University: Hand-delivered impact reports/scholar profile reports for the area/scholarship they support.
- JeffD: Handwritten Student ATHlete Thank-A-Thon to PAST and CURRENT athletics givers.....
- adrian: Including the whole family- i recall one principal gift donor - we included his daughter in planning a surprise birthday for him and making a book that was a timeline of the whole family's support at our university.
- michelle nicholas: Targeted scholarship reports
- Villanova University: thank you letters from students who receive endowed scholarships
- Villanova University: impact statements with personalized notes from their assigned gift officer
- Todd: shutterfly book depicting photos and stories of their previous scholarship recipients over the years.
- University of Maryland Baltimore: creative stewardships- "chautauqua's" to engage donors in innovative discussions outside typical university topics
- University of Cincinnati Foundation: TAG day thank you cards
- Villanova University: recognition events
- adrian: Do you have any samples of these you are willing to share?
- Biola: moves are often dependent on meetings...- you probably get asked this often as well -how many meetings should MGO's be having on average per month?
- KBowman: Can we obtain a copy of the questions submitted today?
- Carleton University: The strategy document sample please
- adrian: portfolio analysis reports/dashboards you like/ reports that are helpful/ etc!
- PCOM: Could we have a sample of the contact report?
- KBowman: The slide you presented in your presentation on Portfolio Management was not clear either in presentation notes or online. Can you send that Portfolio Chart to participants?
- Al Gwen: Kathy's July conference: <http://www.academicimpressions.com/conference/major-gift-solicitation-july-2016>
- U of O - Go Ducks!:Thank you!
- David: a very informative session thanks for this.
- Carleton University: Thank you !
- adrian: Yes thanks so much
- Lehigh University: Thank you for another great session.
- Villanova University: Thank you!
- University of Oregon: Thank you! Go Ducks!
- Dartmouth College 3: Many htnks-- lots of good ideas.

Staffing Proposal Recommendations - Microsoft Excel										
	A	B	C	D	E	F	G	H	I	J
1	Prospects and Fundraisers by Unit									
2										
3		Current Assignments	Unassigned prospects (\$25-\$100K Rated)	Unassigned prospects (\$100K+ Rated)				Gap Analysis		Request
4	Unit	# PRM	# Unassigned Non-Alumni Prospects	# Unassigned Alumni Prospects	# Unassigned Non-Alumni Prospects	# PRM & Unassigned Prospects	# Fundraisers	Additional Fundraisers needed at 100 prospects/fundraiser	# Proposed Additional Fundraisers	
5	Alumni and Community Engagement	0	0	0	0	0	0	0	0	
6	Arts & Humanities						0	0	0	
7	Athletics						0	0	0	
8	Biological Sciences						0	0	0	
9	Corporate and Foundation Relations						0	0	0	
10	Gift Planning						0	0	0	
11	Health Sciences						0	0	0	
12	International Relations and Pacific Studies						0	0	0	
13	Jacobs School of Engineering						0	0	0	
14	Libraries						0	0	0	
15	Physical Sciences						0	0	0	
16	Preuss School						0	0	0	
17	Rady School of Management						0	0	0	
18	Social Sciences						0	0	0	
19	Scripps Institution of Oceanography						0	0	0	
20	University Wide						0	0	0	
21	Total	0	0	0	0	0	0	0	0	
22										
23	*PRM - Prospect Relationship Management									
24										
25	Data point needed for UCSD - How many donors below \$25K each year, between \$25 and \$100K, above \$100K									
26	A question for consideration - how many unique donors to each unit below \$25K each year									
27										
28										
29										
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31										
32										
33										
34										
35	DATA SOURCE: Development Services									
36	ESTIMATED DELIVERY: Columns B,C,E due 2/19; columns D,F due 2/24; columns G-J due 2/25									
37										
38										
39										
40										
<div> <p>ASSUMPTIONS</p> <p>"Rated" equals research capacity.</p> <p>University Wide encompasses diversity, scholarship and fellowship fundraisers.</p> <p>ACE includes Chancellor's Associates, Annual Giving, parents and ArtPower! fundraisers.</p> <p>The current assignments will include team leaders and team members, not unique prospects.</p> <p>Unassigned alumni will be allotted to their preferred degree in columns C and F.</p> <p>Scripps Institution of Oceanography includes Birch Aquarium.</p> </div>										