


**FUNDRAISING ESSENTIALS:
PERFECTING MOVES MANAGEMENT** *#AItraining*



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**ai ACADEMIC
IMPRESSIONS**

 **LEARNING OUTCOME**


After participating...


...you will be have additional tools to better transition your prospects through the donor cycle more effectively.

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 AGENDA


- Evaluating the effectiveness of your donor pipeline
- Reviewing the solicitation cycle
- Stewardship and Upgrading: Progressing the conversation
- Tools to assist you in moving donor engagement towards an upgraded ask

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 REFLECTION

Excellence is never an accident: It is the result of high intention, sincere effort, intelligent direction, skillful execution and the vision to see obstacles as opportunities.

~ Unknown

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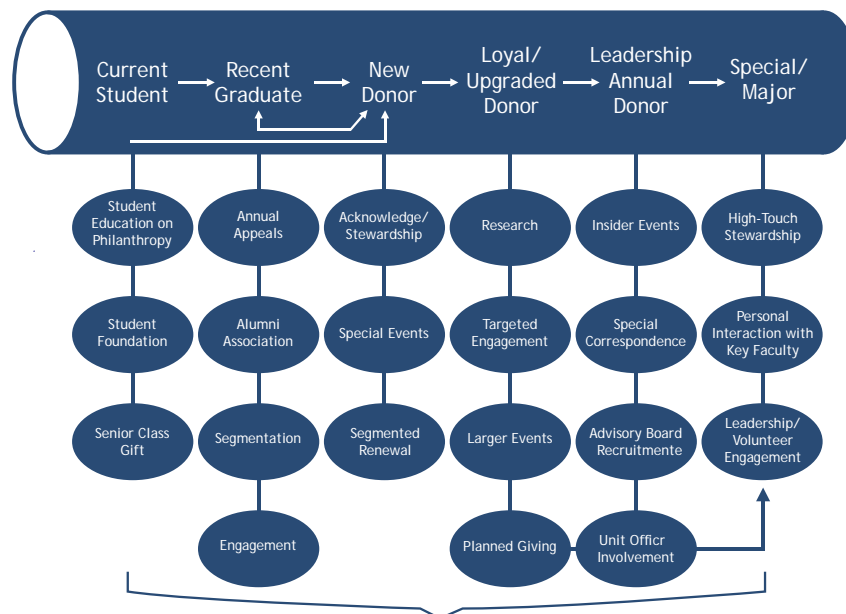
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EVALUATING THE EFFECTIVENESS OF YOUR DONOR PIPELINE




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DONOR PIPELINE




 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 FY2011, gave about 74% of the years that they were on file
- 57% of them made a first gift less than \$100

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 POLL

What % of donors in your portfolio were personally solicited for a **major gift ask** last year?

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PORTFOLIO CHART

Prospects and Fundraisers by Unit									
Unit	Current Assignments	Unassigned prospects (\$25-\$100K Rated)		Unassigned prospects (\$100K+ Rated)		Gap Analysis		Request	
	# PRM	# Unassigned Alumni Prospects	# 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
Alumni and Community Engagement	0	0	0	0	0	0	0	0	0
Arts & Humanities						0		0	
Athletics						0		0	
Biological Sciences						0		0	
Corporate and Foundation Relations						0		0	
Gift Planning						0		0	
Health Sciences						0		0	
International Relations and Pacific Studies						0		0	
Jacobs School of Engineering						0		0	
Libraries						0		0	
Physical Sciences						0		0	
Preuss School						0		0	
Rady School of Management						0		0	
Social Sciences						0		0	
Scipps Institute of Oceanography						0		0	
University Wide						0		0	
Total	0	0	0	0	0	0	0	0	0

*PRM - Prospect Relationship Management

Data point needed for UCSD - How many donors below \$25K each year, between \$25 and \$100K, above \$100K
A question for consideration - how many unique donors to each unit below \$25K each year

Determining the unit for unassigned non-alumni prospects may be difficult. It will require some degree of manual review.

Determinations will be made on giving history, interest codes and any other known indicators. Any prospects with unknown interests will be added to University Wide.

DATA SOURCE: Development Services

ESTIMATED DELIVERY: Columns B,C,E due 2/19; columns D,F due 2/24; columns G-I due 2/25

ASSUMPTIONS
"Rated" equals research capacity.
University Wide encompasses diversity, scholarship and fellowship fundraisers.
ACE includes Chancellor's Associates, Annual Giving, parents and ArtPower! fundraisers.
The current assignments will include team leaders and team members, not unique prospects.
Unassigned alumni will be allotted to their preferred degree in columns C and F.
Scipps Institute of Oceanography includes Birch Aquarium.

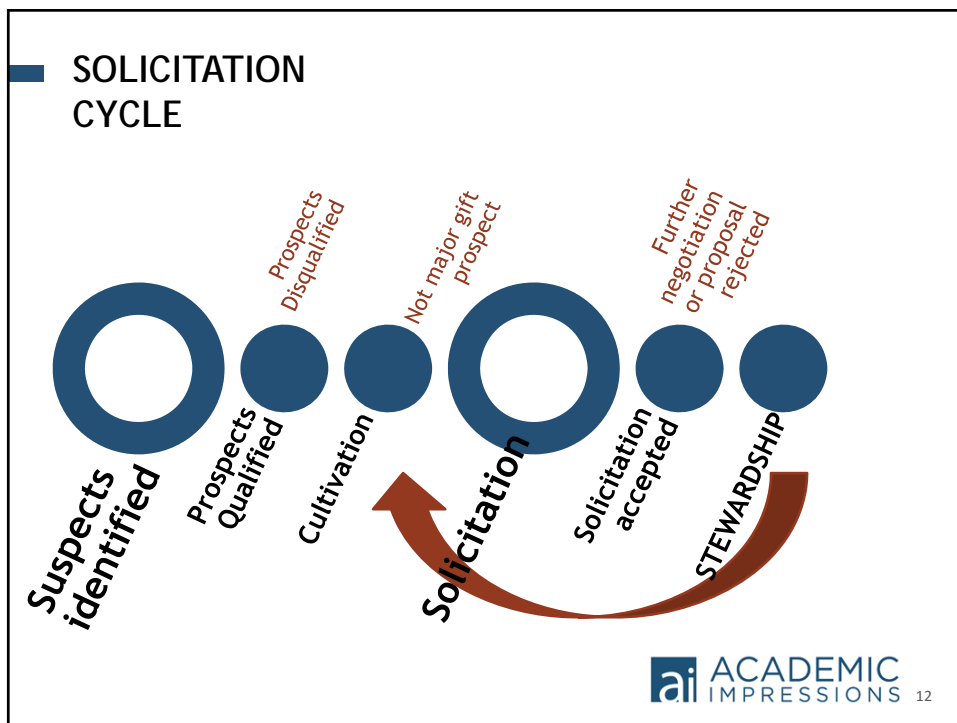
ASSESSING YOUR PIPELINE

ADDITIONAL QUESTIONS FOR CONSIDERATION

- How long is it from the time a donor makes his or her first gift to the time he or she makes a \$10,000 gift?
- What % of donors in your portfolio were personally solicited for a leadership annual ask?
- How effectively are you upgrading donors (both annual and major gift donors)?
- What % of your donors were touched in the last 90, 180 or 360 days?

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REVIEWING THE SOLICITATION CYCLE



BEST PRACTICES FOR PORTFOLIO MANAGEMENT

- Set a next step before and after every interaction
- Timely Contact reports (within 4 days)
- Monthly review of activity
- Quarterly review of assignments (what else could we do)
- Shoot to do one more meeting a week (result is 40 more meaningful moves)
- Start each day with “two touches”



BEST PRACTICES

YEARLY REVIEW OF PROSPECTS YOU EXPECT TO SOLICIT FOR A MAJOR GIFT THAT YEAR AND WHAT STEPS ARE NECESSARY PRIOR TO THAT SOLICITATION

- Sharing of these spreadsheets at PM meetings increases accountability
- Develop written plans for all prospects with a solicitation planned in the next 12 months
- Dual ask/define role of annual giving (or planned giving too) in the solicitation strategy
- Track quarterly progress to date and ensure action items are being accomplished




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**STRATEGY OUTLINE:
THE OCCASIONAL
DONOR**

JOE BROWN

- \$50 occasional donor
- Has been largely unengaged and unresponsive to attempts for a meeting
- Identified with \$5 million gift capacity
- No personal contact to date from the university
- **GOAL:** to solicit for leadership annual gift within 6 months and \$100,000 within 24 months


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**STRATEGY OUTLINE:
THE NOT-PROPERLY-
ENGAGED DONOR**

SAGE FOUNDATION

- \$5 million naming gift in 1992
- Trustees were actively involved in facility creation, implementation and opening through 1994
- Strong stewardship in place till 2000; variety of development officers with starts and stops through 2013
- Occasional \$50,000 annual gift (4 out of ten years)
- 20 year celebration provides new outreach opportunity, but lacks strategy
- **GOAL:** solicit for \$25 million naming gift by December 2014

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RESOURCE

Key probing questions

1. Do you believe your gifts to xxx are making a difference?
If so, how?
2. What other organizations do you currently support?
Volunteer for? Serve on the board of?
3. When you give, do you give both annually and to capital projects?



CHAT

What probing questions
have worked well in your
experiences with
prospects and donors?



IDENTIFYING WHEN TO ASK

- There is no easy button for knowing when to ask!
 - Have you identified giving priorities?
 - Have you effectively outlined a case for support related to those giving priorities?
 - Are you a philanthropic priority for the donor?
 - Do you know that the time/project are right for the donor?
 - Is the ask part of a larger strategy?
 - Have you set on a test ask? Soft ask? Hard ask?



QUESTIONS

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STEWARDSHIP AND UPGRADING: PROGRESSING THE CONVERSATION



AFTER THE ASK

- Ensure you have a plan before making the ask:
 - Announcement
 - Press
 - Electronic versus other
 - Symbolic/Tribute
 - Personalized Touches
 - Leadership
 - Consistent and Meaningful
- Put the wheels in motion



■ STEWARDSHIP

- Perpetual stewardship versus stewardship for upgraded gifts
- Define who is responsible for stewardship
- Develop and execute a stewardship plan
 - Define which prospects will be asked for significant upgrades and ensure stewardship of prior gifts positions you for success
 - Annual
 - Major
 - Planned




■ STEWARDSHIP PLAN

- Bob Jones gave his first \$50K gift for scholarships last year
 - Personalized letter from Dean and President
 - Personalized letter from scholarship recipient and photo of donor and recipient sent post event
 - Invitation to attend annual scholarship luncheon
 - Weave Cultivation into all Stewardship Planning (and utilize strengths of stewardship office!)




■ STEWARDSHIP
PLAN
(CONTINUED)

- Highlight gift in alumni e-newsletter/magazine
- Six month communication highlighting impact of scholarships
- Dean/DOD semi-annual communications of interest - general information or scholarship specific

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■ DOES THIS PLAN
REPRESENT THE
DONOR OR THE
INSTITUTION?

- Us versus Them
- Forced versus Organic
- Canned versus Customized

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DOES THIS PLAN SET UP AN UPGRADED ASK?

- Ensure Role Modeling
- Share Program Aspirations
- Promote Matching When Possible (Challenge Grant)
- Demonstrate Value in Relationship
- Make Sure the Next Outcome is Clear to All
- Long Term Annual Donors are Important Too!



STEWARDSHIP SUPPORT TO UPGRADES & SOLICITATIONS

- Annual update letter
- Special occasion cards (do they make a difference?)
- Initiative impact reports
- Photo cards (donor celebrations/student success/research wins)
- Fun facts
- Coffee table books
- Remind them why THEIR philanthropy makes a difference





CHAT

What Creative Stewardship Has Worked for You?



■ APPROACHING UPGRADING NATURALLY

- Build on their desire to impact/change
- Make it easy (go from one gift annually to two, two to four)
- Giving societies
- Peer “pressure”; ego drivers
- Ask if they are willing to consider a leadership gift
- Match or Challenge opportunities
- Multi-year pledges



■ UTILIZING EVENTS FOR UPGRADES

- Legacy events
- Giving societies
- Participation “join us” requests
- Highlight donor stories that best match your target audiences
- Build upon captions
- We missed you cards/notes with event highlights
- Make the ask for next step in a the cultivation process (and follow up quickly!)



■ WHEN TO MOVE A PROSPECT

- Most important, prospects always need a portfolio “home”
- Build discipline into your system to ensure “no donor is left behind”
- After qualification visit
- Following a “hard” no
- Lack of engagement
- When next step is lacking



■ WHEN TO TRANSITION A PROSPECT OUT OF YOUR PORTFOLIO

- Personality Not a Fit
- Interests Better Suited to Another Area of Campus
- Another Unit Can Better Fulfill Donor Needs
- Collaboration or Team Approach
- Repeated No Contacts



QUESTIONS



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ACCOUNTABILITY TOOLS THAT SUPPORT YOUR EFFORTS



■ TOOLS

- Portfolio Analysis Reports
- Contact Report Review
- Tasks In Database
- Dashboards in System
- Gift Trend/Analysis
- Transparency In Gift Meetings
- Recognition of ALL Types of Gifts
- Anatomy Of A Gift



SETTING GOALS

- What are upgrade goals?
- What do your donor portfolios need to look like in order to meet your goals?
- Who should be managing portfolios?
- Who should lead donor upgrade conversations?
- How wide is the conversation?
- What two commitments from this discussion will move your shop towards a greater focus to engagement/upgrades?




TAKEAWAYS

- Engagement is key in everything we do
- Always be focused on outcomes; short term and long term
- Portfolio management is critical
- Track trends, look for ways to move them in compelling ways
- All members of the team contribute to moves management; find ways to grow your collaboration






 QUESTIONS



 EVALUATION

Thank you!

Please remember to complete the event evaluation.
Your comments will help us continually improve the
quality of our programs.



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