Extreme Engagement for Major Gifts

Laurel McCombs
Senior Philanthropy Advisor
## Our Philanthropic Goal

| The most generous gift
| In the shortest possible time
| For an organizational priority
| In an ethical and professional manner
| Resulting in inspired, joyous giving
| Deepening engagement
| Life-long trusting, productive, satisfying relationship |
Success Factors

*Fundraising Bright Spots Report, Haas Jr. Fund*
Requires a Dual Focus

**Culture**
- Philanthropic
- Donor-Focused
- Power of Vision
- Organizational Will

**Strategy**
- Build Pipeline
- Structure Your Program
- Plan & Evaluate
- Focus on Priorities
Productive Relationships

- Result in life-long gifts to your agency’s top priorities
- Are satisfying to both the donor and the agency
- Are multi-faceted with ties to a variety of people
- Includes more than monetary contributions
The Tarnside Curve of Involvement

*Developed by Patrick Boggen, Tarnside Consulting, UK*
What is Engagement?

Is two-way and interactive

Advances the mission and vision, concretely helpful

Personally meaningful and satisfying to the donor

Has “think” “feel” & “do” components

Is for everyone - prospects and existing donors
Taking Engagement to the Extreme!
Integrated Donor Development
Taking It to the Next Level

**Activities**
- Can happen in any order
- Have no end goal toward which you are working
- May or may not be personalized

**Moves**
- Are strategic - planned and adjusted as a sequence
- Have an end goal in mind
- Are personal & tailored
Donor Planning

- # of major & principal gift prospects assigned to gift officer (relationship manager)
- % of major and principal gift prospects with written donor engagement plan

<table>
<thead>
<tr>
<th>Strategic Initiatives to Increase Motivation, Decrease Obstacles, Engage Decision Makers, Confirm Rights</th>
<th>Person</th>
<th>By When</th>
<th>Specific Expected Minimum and Maximum Results</th>
</tr>
</thead>
<tbody>
<tr>
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Comments on Relationship, Values, Philanthropy, “Yeses”

*Excerpt from The Osborne Group’s Major Gift Strategy Worksheet*
# Prospect Management

*Excerpt from The Osborne Group’s Prospect Management Report*

<table>
<thead>
<tr>
<th>Name of Prospect</th>
<th>Assigned</th>
<th>C</th>
<th>I</th>
<th>R</th>
<th>Major Gift</th>
<th>Annual Fund</th>
<th>Next Move</th>
<th>Who</th>
<th>When</th>
</tr>
</thead>
<tbody>
<tr>
<td>Joe Donor</td>
<td>JP</td>
<td>C10</td>
<td>H</td>
<td>RD</td>
<td>$5m</td>
<td>$250k</td>
<td>Confirm right purpose</td>
<td>JP</td>
<td>2/15</td>
</tr>
<tr>
<td>Sam Giver</td>
<td>CO</td>
<td>C8</td>
<td>L</td>
<td>RD</td>
<td>$1M</td>
<td>$500k</td>
<td>Raise giving sights</td>
<td>CO</td>
<td>3/31</td>
</tr>
<tr>
<td>Mary Philanthropist</td>
<td>TB</td>
<td>C7</td>
<td>L</td>
<td>RF</td>
<td>$50k</td>
<td>$5k</td>
<td>Visit w/ donor</td>
<td>TB</td>
<td>2/28</td>
</tr>
<tr>
<td>Lilly Patient</td>
<td>JP</td>
<td>C5</td>
<td>M</td>
<td>RC</td>
<td>$25K</td>
<td>$1K</td>
<td>Tour with Dr. O</td>
<td>JP</td>
<td>3/5</td>
</tr>
<tr>
<td>Jim Onthefence</td>
<td>TB</td>
<td>C4</td>
<td>H</td>
<td>RB</td>
<td>$50K</td>
<td>$5k</td>
<td>Visit w/Sue</td>
<td>TB</td>
<td>3/12</td>
</tr>
</tbody>
</table>
Every Engagement Must..

Increase Motivations

Decrease Objections
Solving the Donor Puzzle©

- Capacity to give
- Philanthropic motivations, values, and interests
- List of philanthropies and why
- Expectations
- Engagement and stewardship preferences

- Affinity with, knowledge of, cause (organization)
- Decision makers and process
- Profile of other decision makers
- Natural partners and connections
- Personal capital
- Potential issues
Ends With a YES to Next Step
Follow-Up Activity: Moves Brainstorm

• Create brief description/profile of the prospective donor
• Brainstorm and answer the following questions:
  • Where is the donor on the Tarnside Curve?
  • Donor Puzzle: What do we know? What do we need to know?
  • What is our next move? (objective, strategy, person, yes)
Greater than Us...

• Force Multipliers
• What are the markers of a CHAMPION?
• How do we empower & manage?
“Let’s not scare him off with talk of leadership, vision, and legacy. Let’s just ask for money.”
Strategic Conversations
It’s a 30/70 Conversation

What You Say
30%

What They Say
70%
The Seven Powers of Questions*
*Dorothy Leeds

• Demand answers
• Stimulate thinking
• Provide needed and invaluable information
• Put you in control
• Get people to open up
• Lead to quality listening
• Get people to persuade themselves
Five Step Visit Prep

- What do we want them to say yes to?
- What do we know?
- How do we find out what we don’t know?
- What do we need to share with them?
- Prepare the team
Closing the Visit Loop

Collect   Analyze   Plan

Record
Evaluating Calls & Visits

<table>
<thead>
<tr>
<th>Call Metrics</th>
<th>Visit Metrics</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Approaches with most success</td>
<td></td>
</tr>
<tr>
<td>• Email, Note, Call</td>
<td></td>
</tr>
<tr>
<td>• From whom</td>
<td></td>
</tr>
<tr>
<td>• Number of calls to get one appointment</td>
<td></td>
</tr>
<tr>
<td>• Time of day with most success</td>
<td></td>
</tr>
<tr>
<td>• Day of week with most success</td>
<td></td>
</tr>
<tr>
<td>• Three reasons with most success</td>
<td></td>
</tr>
<tr>
<td>• Number of visits</td>
<td></td>
</tr>
<tr>
<td>• Visit plans completed</td>
<td></td>
</tr>
<tr>
<td>• Visit outcomes</td>
<td></td>
</tr>
<tr>
<td>• Visit yield (long-term)</td>
<td></td>
</tr>
<tr>
<td>• Other trends (regions, contacts)</td>
<td></td>
</tr>
<tr>
<td>• Manage calendars</td>
<td></td>
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</tbody>
</table>
If It’s Not Written Down, It Doesn’t Exist!

- Contact reports
- Written engagement plans & strategic initiatives
- Recording and tracking moves
- Recording and tracking follow up
- Make it easy & systematic
Suite of Engagement Opportunities
Developing Your Catalog

What we have now...

New ideas...

Suite of Engagement Opportunities
Engagement Opportunities Brainstorm

What We Have Now

• Keep doing as is
• Tweak, Add, Enhance
• STOP

New Ideas

• What we need done
• Suggestions from others
• Understand ROI
## Know Your E (engagement) Scores

<table>
<thead>
<tr>
<th>Activity</th>
<th>Points</th>
</tr>
</thead>
<tbody>
<tr>
<td>Attended vision meeting</td>
<td>5 points</td>
</tr>
<tr>
<td>Hosted an event</td>
<td>3 points</td>
</tr>
<tr>
<td>Raised money</td>
<td>3 points</td>
</tr>
<tr>
<td>Introduced one or more potential donors</td>
<td>2 points</td>
</tr>
<tr>
<td>Served on high level committee</td>
<td>5 points</td>
</tr>
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<table>
<thead>
<tr>
<th>Activity</th>
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<tbody>
<tr>
<td>Participated in Day of Service</td>
<td>3 points</td>
</tr>
<tr>
<td>Took tour and brought a friend</td>
<td>3 points</td>
</tr>
<tr>
<td>Board Member</td>
<td>8 points</td>
</tr>
<tr>
<td>Provided high level advice</td>
<td>4 points</td>
</tr>
<tr>
<td>Provided high level expertise</td>
<td>4 points</td>
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<thead>
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<th>Points</th>
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</thead>
<tbody>
<tr>
<td>Attended BFKS Volunteer as Big</td>
<td>3 point</td>
</tr>
<tr>
<td>In touch with staff</td>
<td>8 points</td>
</tr>
<tr>
<td>Attended alumni event</td>
<td>3 points</td>
</tr>
<tr>
<td>Participated in alumni survey</td>
<td>2 points</td>
</tr>
<tr>
<td></td>
<td>1 point</td>
</tr>
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</table>
The Tarnside Curve of Involvement

*Developed by Patrick Boggen, Tarnside Consulting, UK*
Thank You!

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RAISE THE WORK

Metro Toronto Convention Centre

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