



RAISE THE WORK

Metro Toronto Convention Centre
NOVEMBER 25-27, 2019

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*



Fundraising
is Core to the
Organization's
Identity



Fundraising is
Distributed Broadly
Across Staff, Board
and Volunteers



Fundraising
Succeeds Because
of Authentic
Relationships
with Donors



Fundraising is
Characterized
by Persistence,
Discipline, and
Intentionality

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



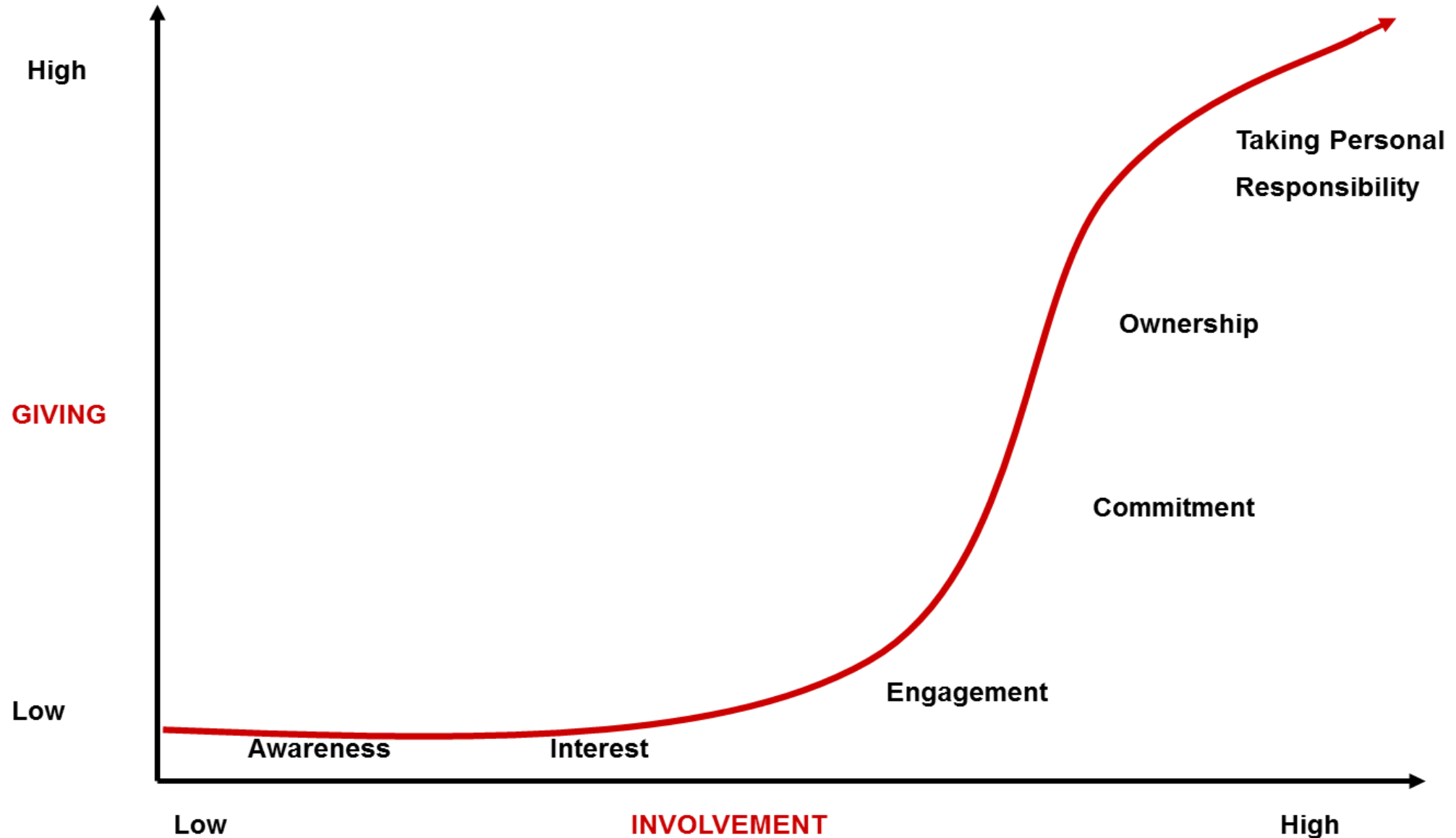
Are multi-faceted with ties to a variety of people



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

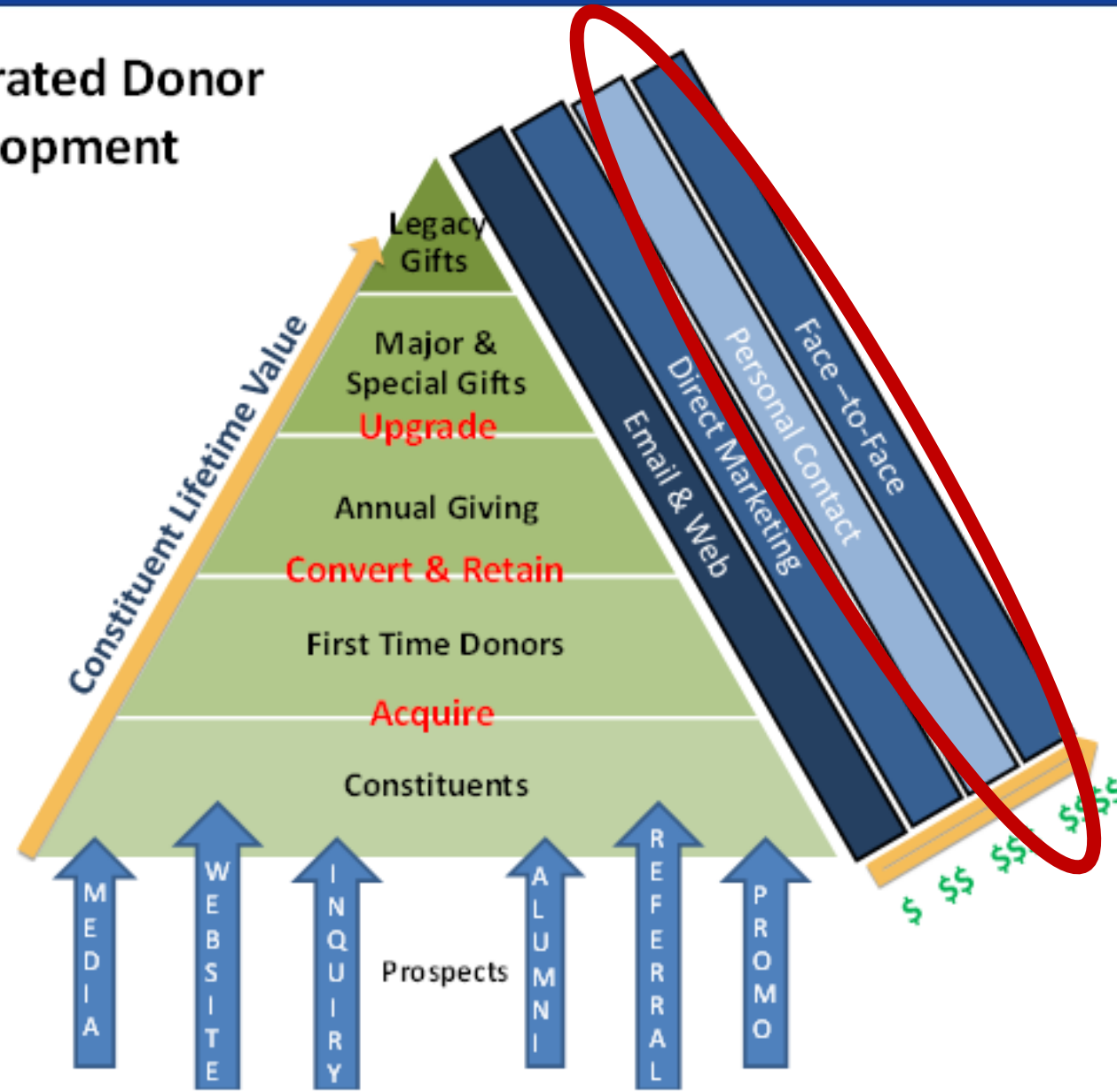
Personally meaningful and satisfying to the donor

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

Strategic Initiatives to Increase Motivation, Decrease Obstacles, Engage Decision Makers, Confirm Rights	Person	By When	Specific Expected Minimum and Maximum Results
Comments on Relationship, Values, Philanthropy, "Yeses"			

**Excerpt from The Osborne Group's Major Gift Strategy Worksheet*

Prospect Management

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

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

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?



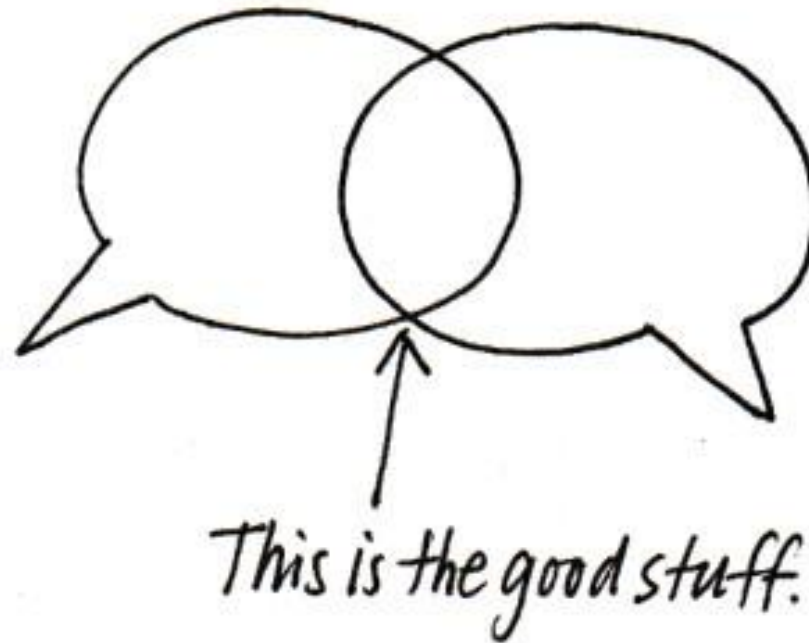


THE CHRONICLE OF PHILANTHROPY

MARK LITZLER

*"Let's not scare him off with talk of leadership, vision,
and legacy. Let's just ask for money."*

Strategic Conversations



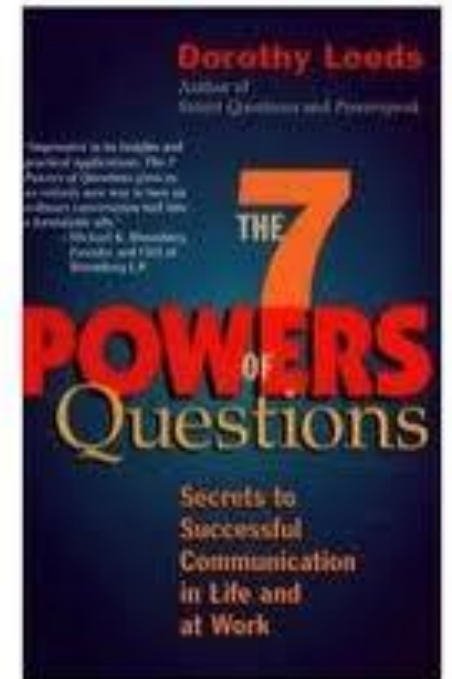
It's a 30/70 Conversation



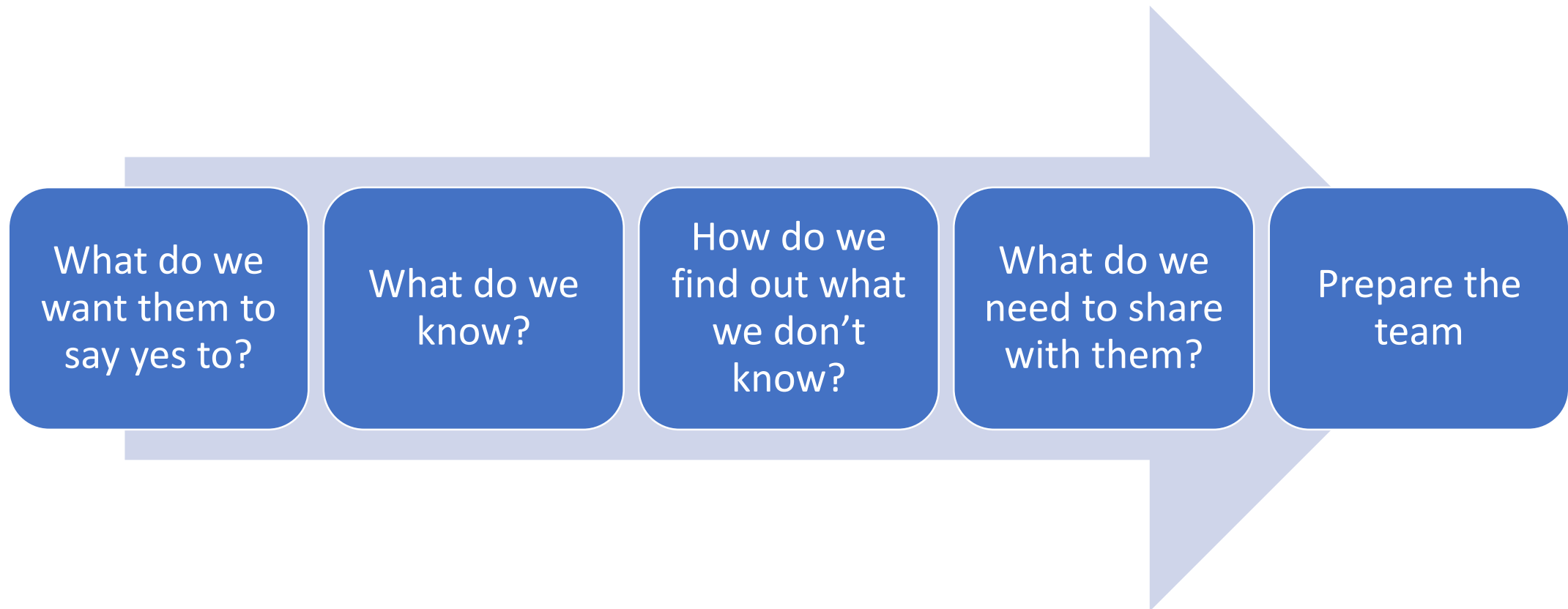
The Seven Powers of Questions*

**Dorothy Leeds*

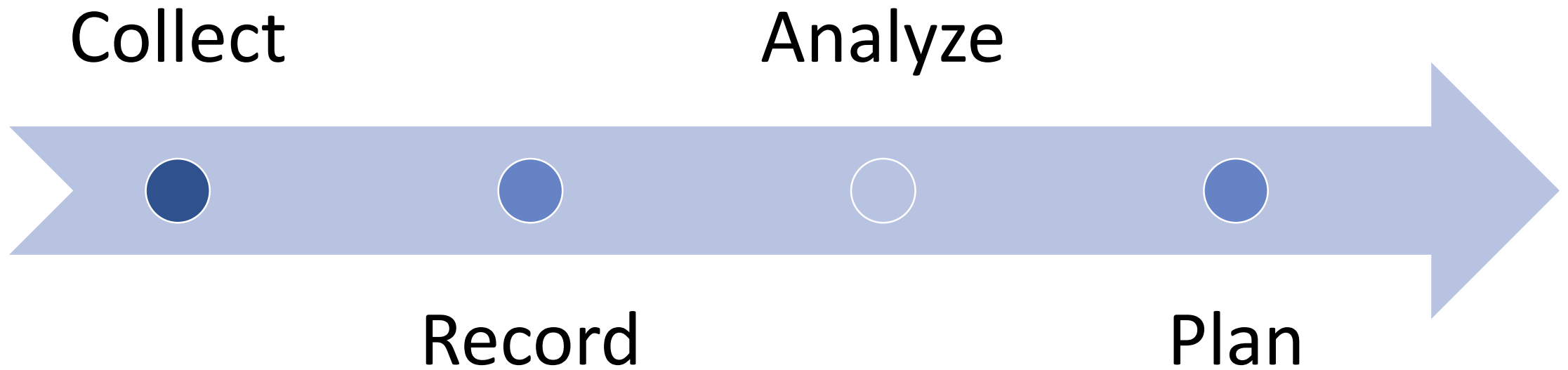
- Demand answers
- Stimulate thinking
- Provide needed and invaluable information
- Put you in control
- Get people to open up
- Lead to quality listening
- Get people to persuade themselves



Five Step Visit Prep



Closing the Visit Loop



Evaluating Calls & Visits

Call Metrics

- Approaches with most success
 - Email, Note, Call
 - From whom
- Number of calls to get one appointment
- Time of day with most success
- Day of week with most success
- Three reasons with most success

Visit Metrics

- Number of visits
- Visit plans completed
- Visit outcomes
- Visit yield (long-term)
- Other trends (regions, contacts)
- Manage calendars

If It's Not Written Down, It Doesn't Exist!

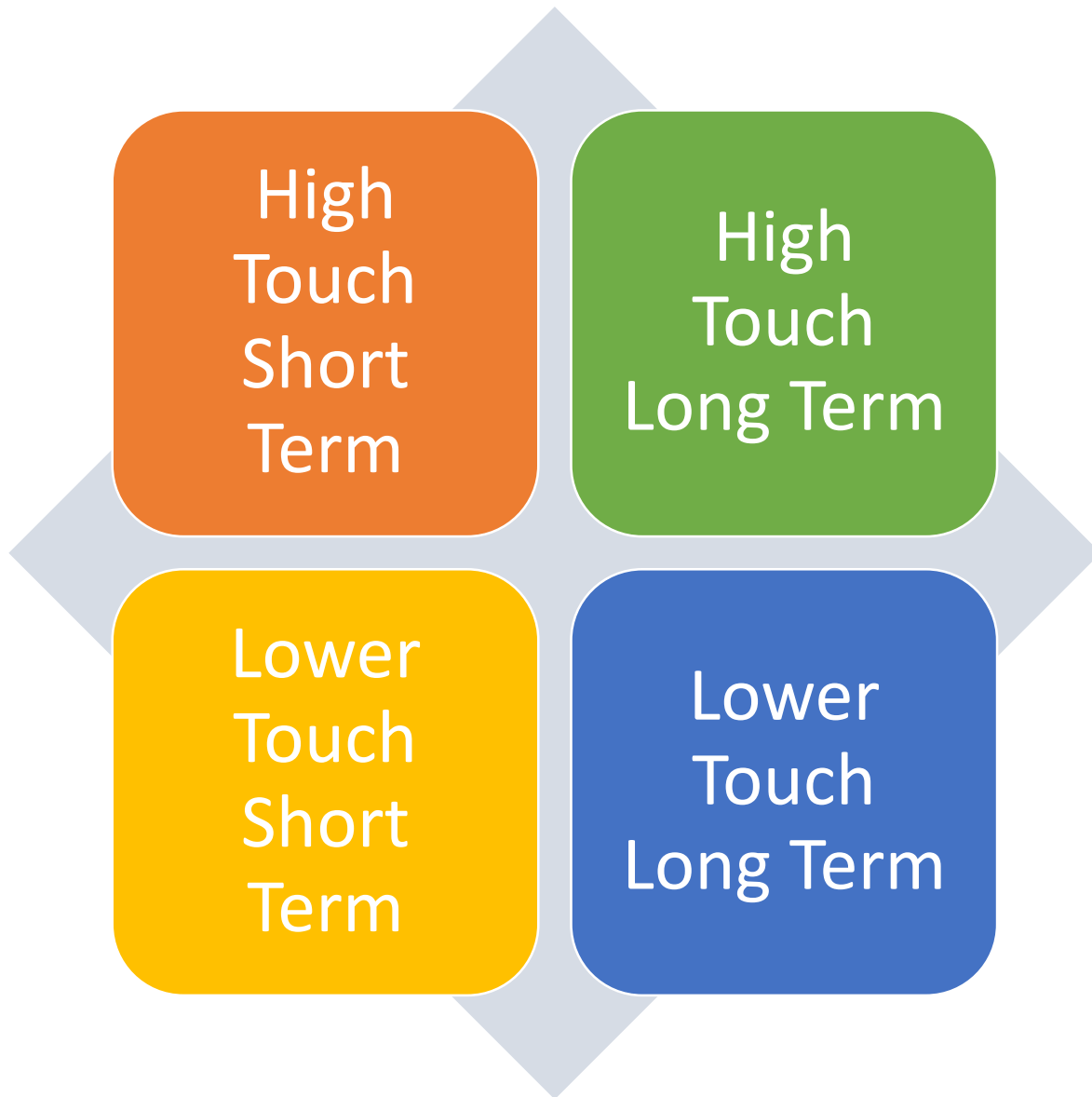
Contact reports

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

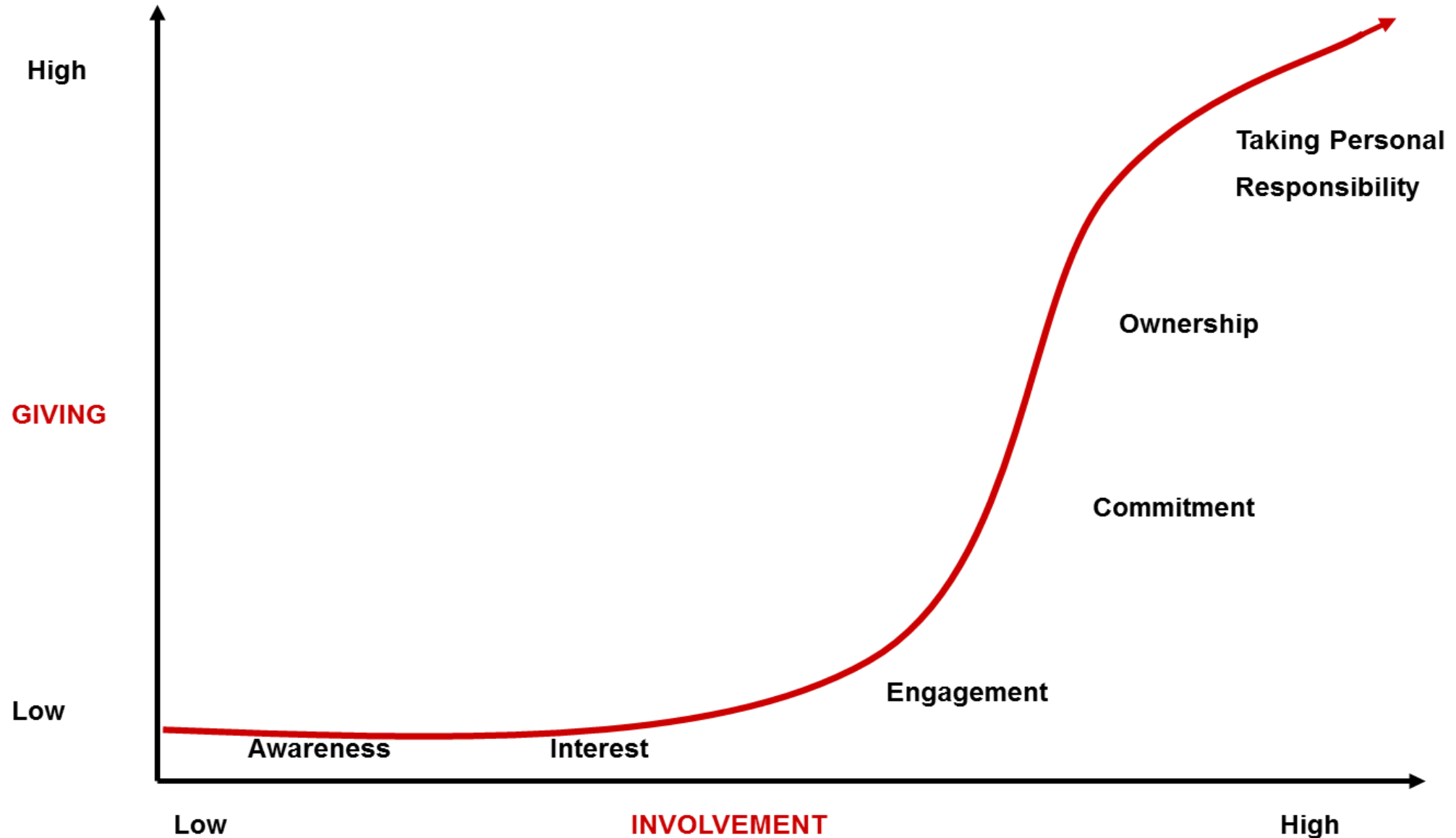
Attended vision meeting	Hosted an event	Raised money	Introduced one or more potential donors	Served on high level committee
5 points	3 points	3 points	2 points	5 points

Participated in Day of Service	Took tour and brought a friend	Board Member	Provided high level advice	Provided high level expertise
3 points	3 points	8 points	4 points	4 points

Attended BFKS	Volunteer as Big	In touch with staff	Attended alumni event	Participated in alumni survey
3 point	8 points	3 points	2 points	1 point

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Thank You!

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lmccombs@theosbornegroup.com



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