

It's Everyone's Job!

The Major Gifts Group Think

(overview – please email greenhoej@gmail.com to discuss full presentation)



Development Team Strategy for Transformational Philanthropy



The Confident
Fundraiser

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Overview

- Written Document
- HIGHEST Level Prospects
- Shared With Group
- Regular Meetings
- Progress
- Help!
- Where “Stuck”



Characteristics

- “Make or Break” Donors
- Highly Complex
 - Relationships
 - Interests
 - Giving Mechanisms
- Many People Involved
- Major Commitment
 - Time
 - Financial Resources
- Long Term (Often Years)



Strategy Discussion Guide Rationale

- Builds Consensus
- Promotes Collaboration
- Uncovers Multiple Interests
- Encourages Diverse Strategies

Rationale

- Encourages Accountability
- Promotes Self Discipline
- Prevents Silo Mentality
- Cements Commitment



Participants

- **Core Team**

- Gift/Advancement Officers/DoDs
- Associate VP/Admin Asst
- Prospect Research Director
- Consultant/Strategist/Independent Voice

- **Other Advancement Participants**

- Stewardship/Donor Relations
- VP Univ Relations
- Alumni Relations/Affairs
- Marketing/Communication
- Events



Key *Strategic* Partners

- May Include
 - Deans/Chairs/Faculty
 - Board/Leadership Volunteers
 - Top Leadership – President/Chancellor/Provost (usually infrequent)
- Caution
 - Justification
 - Clearly Defined Roles
 - *You* are the Professionals

Prep Work

- Gift Officers Prepare Strategy Discussion Guides for Top Donors
 - Top prospect for first meeting
 - Work toward total of 3-5 prospect guides
 - Provide to leadership at least 24 hours prior to meetings

Format

- Meetings of 60-90 minutes, at least monthly
- Individual prospect reviews (max. 15 minutes)
- Gift Officer Role
 - Provides overview/introduction of the plan
 - Reports recent and upcoming donor interactions
 - As appropriate, GO asks for help/suggestions
 - Next steps
 - Getting “unstuck”
 - Overall observations



Format

- Confidentiality
 - External
 - Internal
 - Not everyone on the team needs to know EVERY detail
- Safe Environment
 - No dumb questions
 - OK to challenge assumptions
 - Constructive feedback
 - Exercise sensitivity/no hard feelings

Format

- Input

- Team members provide :

- Suggestions
- Remedies
- Insights to assist GO in the relationship

- If possible, an agreement/resolution on appropriate next/future steps should be reached.

- These next steps should be reviewed evaluated in future meetings.



The Strategy Discussion Guide Components

- Prospect Name/Contact Information
- Assigned Gift Officer
- Background
 - “Snapshot”



Background

- Name (Class Year)
- Areas of Interest (Big Idea)
- Who Are They?
 - What do we need to know about this person?
 - What makes them interesting?
 - How am I feeling about my relationship with this person?
 - Comfortable?
 - Concerned



Current Situation

- What is my role?
 - Exclusive
 - Leadership
 - Shared (who is in charge?)
 - Don't Have One
- Who are my partners?
 - Dean
 - Faculty/Chair
 - Other GOs/Development
 - Leadership (President/Chancellor, etc.)
 - Volunteers/Board Members
 - Other (donor, family member, etc.)

Competition

- Other Charities
- Other Universities/Colleges
 - Be mindful of *comparisons*
- Inner Circle/Influencers
- Others on Campus
- Family Members



Influencers

- Advisors – accountants, financial planners, legal counsel
- Coaches – “Clearinghouse,” provide and interpret information
- Peer– Friend/confidant (could be your board member/volunteer)
- Family
 - Spouse/Partner
 - Siblings
 - Children

Strengths and Weaknesses of My Position

- Exclusive/Leadership
- Undetermined or Shared Leadership
- Big Idea?
- Unsure What Will Motivate Donor
- Don't Know Enough About Donor

Meaningful Actions

- “Moves Management” – Plan
- Recent interactions
 - Meetings
 - Phone calls
 - Emails
- Last interaction
 - Detail
 - How did it go?
 - Is there a logical next step?

Being of Service

- How can we thank them?
- How can we serve them?
- What can we do for them?
- How can we engage them?



“Sticky” Points

- What problems do we have?
- What is the status of our relationship?
- Are we accomplishing donor and influencer “wins”?
- What do we need to know? Who can help us?

Conclusion

- Money is There
- Support Team Must be in Place
- Just Need the Right Strategy
- Just Need the Right “Big Idea”

