

What any church leader should know about major gifts management

Resource 3.6

1. Limiting beliefs (<http://thework.com/en/do-work>) will be the biggest hindrance to your major gifts work. If you decide, in your thoughts, that a donor will not give, then you will set up an internal barrier to your own moves to realize a gift. Let them tell you “no” but do not do that for them in advance.
2. Work with, know, memorize and think about your top 50 donors all the time. Keep a card with their names in your wallet or on your tablet, review that list when you have a few free moments in a line at the grocery store, and decide to make three new moves. Then set those moves into your calendar.
3. The hardest think about speaking to a member of your congregation or diocese is making that first call. It is a “cold” call in a way. And yet, not, because they have this wonderful relationship with their church and their God. You are just the midwife, so do not be afraid. Make the call.
4. Choose the right person to secure the gift, not just the easy person. A best friend might be right but not always. And never approach anyone who is married without also cultivating their spouse.
5. This work is based fully and entirely in the theology of the Holy Spirit. The Holy Spirit will nudge but needs your moves to collaborate with at every turn. In the end, the decision will be half spiritual and half emotional. It will be made in a flash of a moment but not until the flash comes. And it will happen because you have been able to “co-labor ate” of your joint enthusiasm (en – thusiasm – the breathing of the spirit) about the gift making the vision happen.
6. Listen to the needs of the donor. This is not about selling your church’s need. It is about linking the donor’s needs to give with your vision for making mission. So listen with active listening skills and often. Seriously. Shut up and listen! Deeply. Often. Thoroughly. So much that you can be sure you are connecting their longings to the institution and not just trying to win a gift.
7. The ask for a major gift is like building blocks. You begin with involvement and then with many small gifts. A massive gift is always preceded by smaller gifts and touch-points.
8. The best way to engage your donors is to involve them in significant leadership roles. A new development officer or Rector’s job is to assemble and form leadership on committees and commissions of influence in philanthropy generation. In a large church or diocese, you will be charged, by program-staff or clergy, of stealing the best people; but if you do not raise the money, there will not be programs! So take courage, and take the hit for the team! A church of 700 worshippers should have 140 top donors in leadership roles which support financial development or vision-casting. A church of 70 worshippers should have 14 top donors or influencers in leadership roles. Hire lay leadership for effectiveness, not charm.
9. Curate your volunteers well. Cultivate the careful attention to their advancement, step by step. Look at each name and ask, “How can I deepen their involvement in a way that connects with their natural passions?”
10. Staff leadership and the staff’s internal, moral character determines the vitality, growth and personality of the church or the diocese. People give to authenticity, humility and integrity. Only. Always.



11. The staff (Bishop, Rector, Canon, Associate Rector, Warden, Program Leader, etc.) is dominant in motivating the major gift – particularly the Bishop and Rector/Dean – personally. Make these relationships. It is always and only about relationships.
12. In order to win a major gift, the donor must be deeply connected to the church or diocese for which money is asked – the cause, not just the institution or the personalities leading it. The donor must feel that the planet needs what is being presented as the case.
13. Determine, with detailed strategy and careful discernment, who should make the call. Spend time on this. Strategy is not un-spiritual.
14. Never in American history has there been an era with greater urgency for the delivery of human and social services to the poor and marginalized. The church is in an amazing position to get great work done. Nor has there ever been an era of such great potential transfer of personal wealth in both major gifts and planned gifts.
15. Thank them seven times. Not seventy times seven – that’s too much. But less than 7 is not enough. No one is ever upset by thanking or appreciation which is humble and sincere.
16. Try not to ask for a major gift over a meal. And never, ever rush the event. Build space into the visit. Get there early to be able to pray in your car. Go over the dialogue in your head. Make sure you have NOTHING scheduled the hour after the visit in case it takes some extra time.
17. Exciting and daring programs will inspire major gifts. If Jesus would recognize it as essential to the kind of mission about which he spoke, there is a good bet so too will the donor prospect.
18. No matter how exciting the program, donors are less likely to give to an institution with financial, gift-management or sexual/relational misconduct problems.
19. A compelling, driving, articulated belief in the organization is singularly important. An ask for a major gift needs to be clearly done in the context of a plan which all fits together. Be articulate about the strategic plan and be sure all stakeholders can articulate it.
20. Donors are making an investment as much as they are making a gift. They want to give to programs that create a significant change for good.
21. Never assume your major gifts prospects really understand the vision for which you are asking major gift support. Vision-casters will need to be very clear - great communicators of clear vision; or donors will not be able to understand the case, and the askers will not be able to clearly ask or develop the case with moves management conversations. It is not just the donors who need to understand the vision; the people around them must also. Everyone must be on the same page – this takes time.
22. Major donors like making challenge gifts. They prefer to invest in a larger philanthropy. They want their gifts to multiply the gifts of others. They like sharing the joy of giving by encouraging the giving of others.

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Resource 3.6 (cont.)

23. Major donors invest in successful campaigns, just as major donors invest their money in successful companies when making stock purchase choices. It is the same act with different motivations and logistics. Plan slowly and carefully. Do not ever open and launch a campaign until you are absolutely sure that cultivation has secured the leadership gifts which will indicate and secure success.
24. Major gifts are almost certain to be repeated but only if your case becomes realized. If you raise major gifts for one case and build only part of it or change your case-midstream because you are responding in the moment to shifting donor interests, you will weaken trust in future gifts.
25. Major donors resist pressure, manipulation, fake charm, obsequiousness, bluster, non-profit empire-building and power-mongering. (So do minor donors...) The great thing about most donors and most church-goers is that they can sniff out inauthenticity in a moment of encounter. This is great news for authentic clergy and Bishops. This is very bad news for those whose authenticity is in question.
26. Campaign case is essential, but campaign literature can often be a turn off. Be clear, be attractive, tell a story. But do not be slick or fancy. Write and design your case materials with your donors in mind. And make sure the early case brochure for top donors is in flux – in a three-ring binder- and able to be changed and adapted to early indicators. The “brochure” is only for the final phase.
27. Take who you need to make the call. Only who you need. Take as few or as many as you need. But plan carefully.
28. Do not let a lack of research on your prospects limit your energy to encounter them.
29. The mission of the church, institution or diocese is of primary, overriding and paramount importance. And that mission needs to be clearly articulated and understood.
30. The “no” of youth and the “yes” of late-life are at play in giving major gifts. Gifts in life tend to be very conservative and conforming. Bequests are less conforming.
31. Bishops, clergy, and leaders must make the search for and identification of major donor prospects part of their daily and weekly routine or else they are not doing all of their job. Bishops, clergy, and leaders are always the Chief Development Officer. If you have a fundraiser on staff, then they are your assistant and motivator regardless of their title and work. Do not triangulate the development officer and staff if a campaign fails. It usually fails because the leader did not make the asks.
32. Ask for the gift.
33. Measure the moves and the asks made. What gets measured, gets done. Measure and track weekly.