



STEWARDSHIP, STABILITY, & SUSTAINABILITY

MAJOR GIFTS PLANNING

January 20, 2021



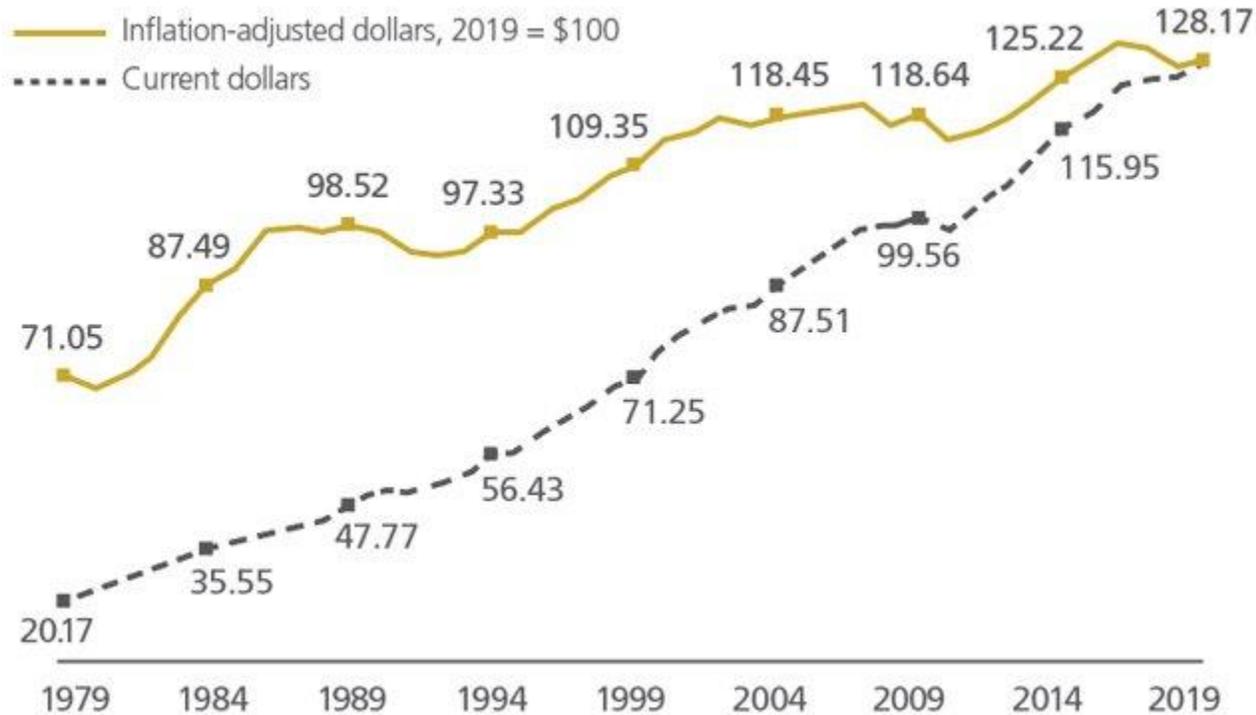
Agenda

Opening Prayer

1. Religious giving in the US
2. Major gift planning
3. Discussion

Closing Prayer

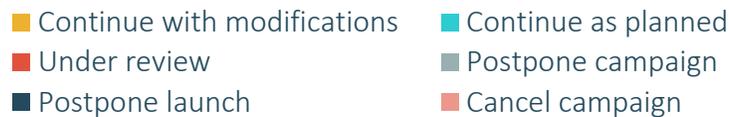
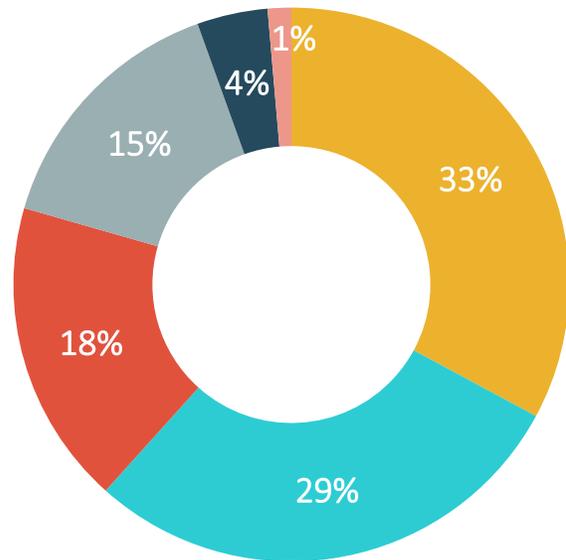
RELIGIOUS GIVING IN THE US



- Giving to religious causes made up **29%** of all donations received by charities in 2019.
- Giving to religious organizations **increased 2.3%** in current dollars from 2018, totaling **\$128.17 billion** in 2019. Adjusted for inflation, giving to religion was flat, with growth of 0.5%.
- According to Blackbaud Institute's *Charitable Giving Report*, **online giving** to its sample of faith-based organizations **increased 8% between 2018 and 2019**. Online giving comprised 10% of total giving for these organizations.

RELIGIOUS GIVING IN THE US DURING COVID-19

Impact of COVID-19 on Campaign Strategy



Key Highlights

- While **54%** of respondents have experienced a **decline** in fundraising, **28%** report an **increase**. Other have experienced no impact.
- **42%** of respondents have launched an **emergency or special appeal**, while **45%** have not. Others are considering launching one.
- **21%** of respondents have held an **online fundraising event**, while **46%** have not. Others are considering hosting one.
- When asked about their primary sources of support amid the pandemic, respondents most frequently cited **current donors and stakeholders**, followed by **major donors**.
- **Personal calls** to major donors were the most frequently cited tactic for engaging and cultivating donors amid the pandemic, followed by **social media campaigns**.

Based upon data collected from 90 respondents via an online questionnaire administered by CCS Fundraising in September 2020.

PRINCIPLES OF MAJOR GIFT FUNDRAISING

PRAYER

spiritual guidance is a vital component for success, especially when asking each parishioner to prayerfully consider a sacrificial gift

PERSONAL VISITS

the most effective method to reach the lay faithful and present the case, plan, and gift request

PROPORTIONATE GIFT REQUESTS

asking families to consider a specific sacrificial gift – calling for equal sacrifices, not equal gifts

PLEGGED COMMITMENTS

families are able to consider a more significant request over time

COMMUNICATIONS

majority of funds are raised from a small group of supporters so it's important to manage communications among this smaller group before sharing success with a wider audience

PRINCIPLES OF MAJOR GIFT FUNDRAISING

People give to people

People give because they are asked

90% of the money comes from 10% of the donors

People give to a winning cause

People give in relation to the person who asks

Giving is contagious

Previous donors are the best prospects

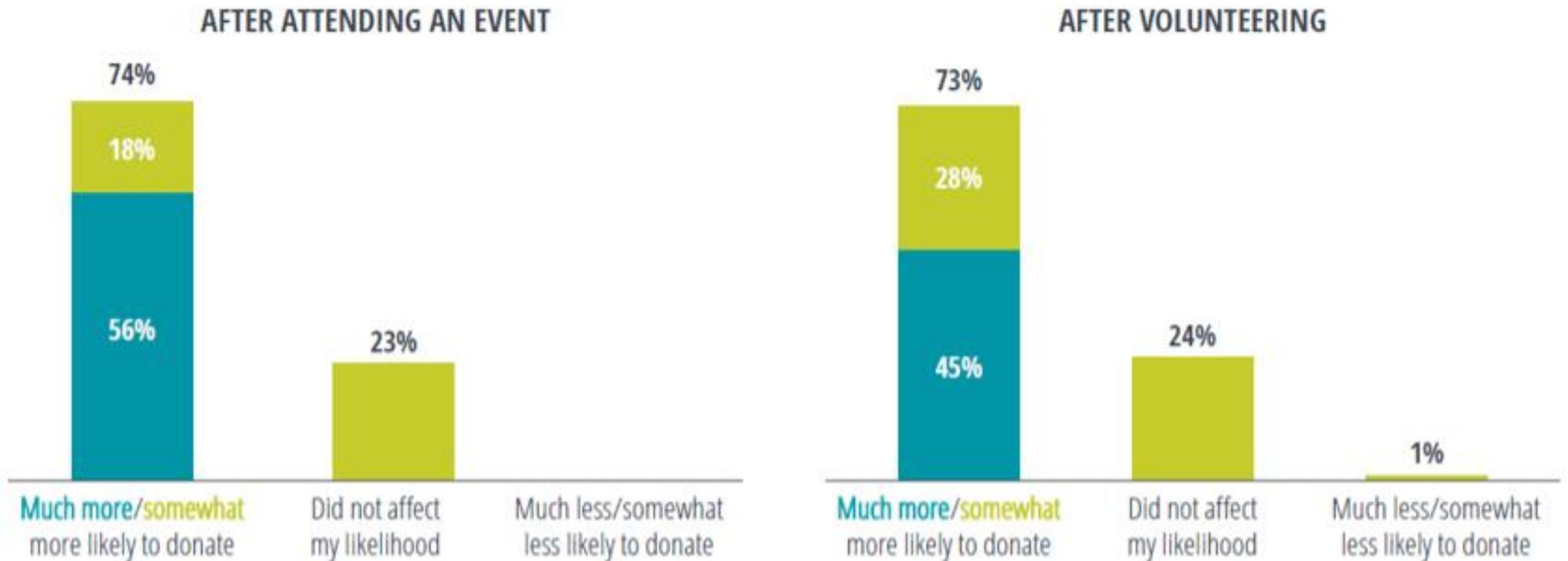
Personal visits result in larger gifts

High sights + managed expectations = success

People give because they believe their gift can make a difference

EVENTS AND VOLUNTEERING ARE MOTIVATIONAL

Volunteering and events factor into the donor loyalty equation and correlate closely with increased giving and engagement.



GROWING PHILANTHROPY THROUGH COMPELLING MESSAGES

How are you talking to supporters about these four core areas?

EMOTION

NEED

SUCCESS

IMPACT

WHAT'S YOUR CASE FOR SUPPORT?

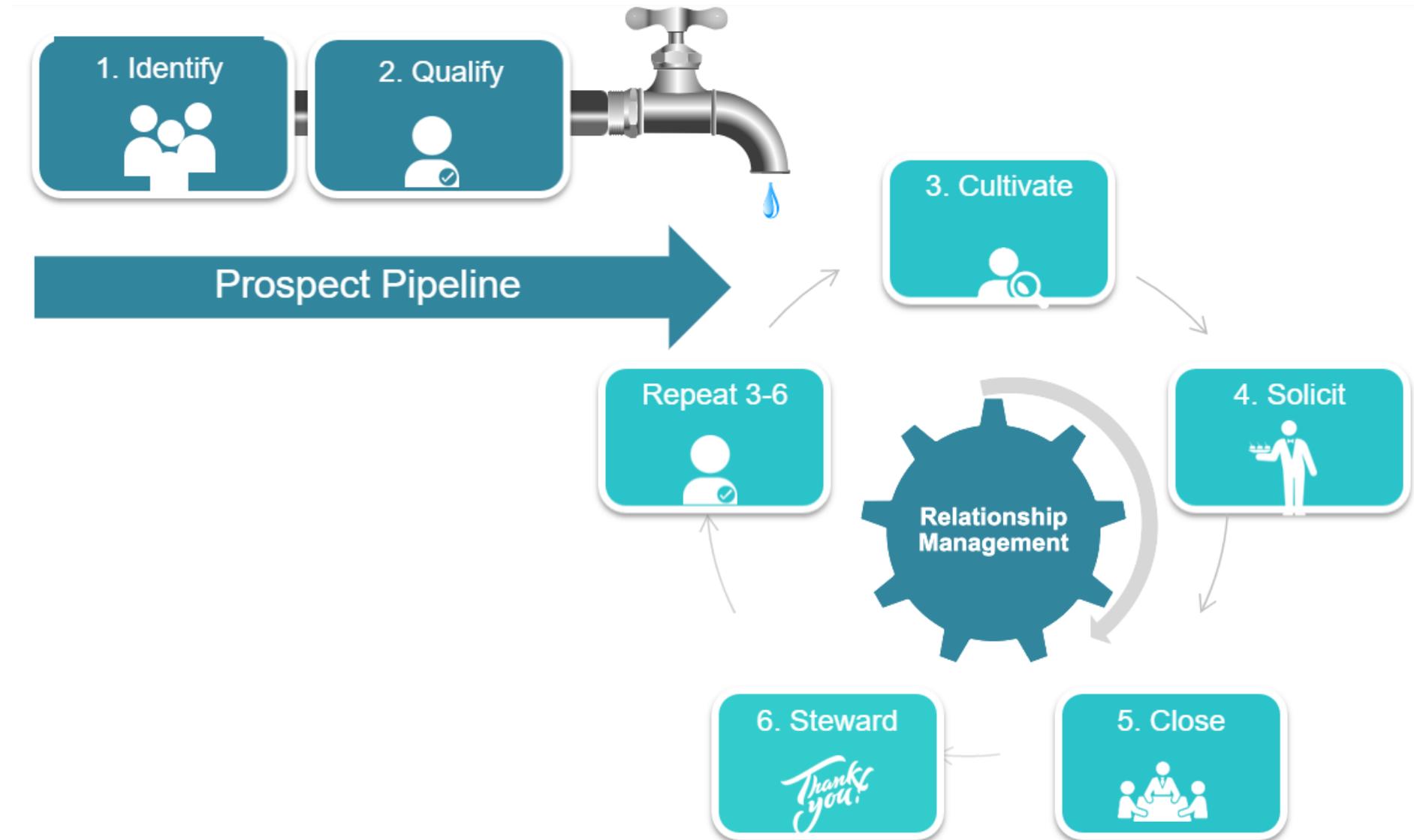
- ❑ Big ideas attract big gifts
- ❑ The “why” for each gift needs to be rooted in the mission and ministry it serves
- ❑ People have their own interests, needs, concerns, and motivations, but...
- ❑ Each major gift is a “campaign” in itself

DEVELOPING A MAJOR GIFTS STRATEGY

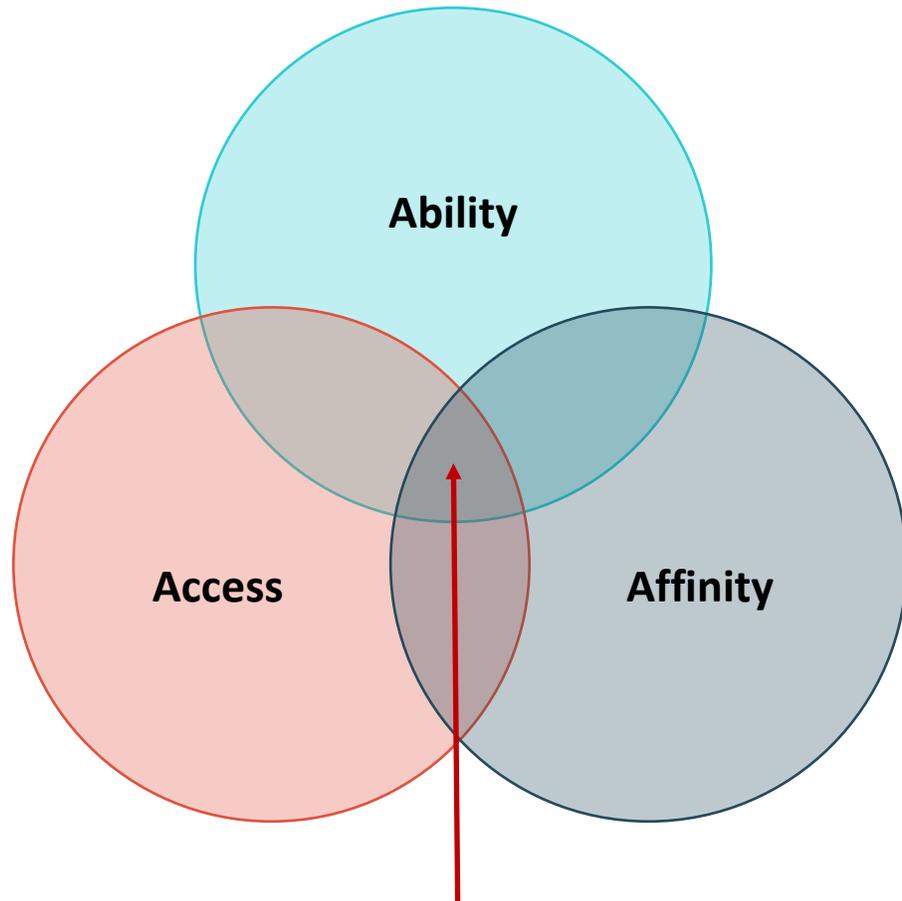
The intentional process of identifying your most capable, ready prospects and determining the best approach to:



PATHWAY TO SECURING MAJOR GIFTS



WHAT MAKES A GOOD MAJOR GIFT PROSPECT?



Top prospects reside in the intersection of all three circles

ABILITY

- Significant financial capacity
- Limited personal commitments

ACCESS

- Direct or indirect relationship with the parish, vestry member, or leadership
- Responds to contact
- Willing to engage

AFFINITY

- Strong philanthropic track record
- Gives to other religious causes
- Gives within geographic region
- Interest

Sample Moves Management Tracker

Resource 3.3

POLL

The meeting between the desires of the donor and the desires and needs of the church

Name	Cultivation 1	Cultivation 2	Cultivation 3	Cultivation 4	Cultivation 5	Cultivation 6	Ask	Follow-up
Smith, Joe	Dinner with Harry Walsh	Visit to the site of the new building	Lunch with the Rector at Rectory	Meeting with the architects to review plans	Meeting with donor of similar gift	Visit to similar church which has new building	Walsh, & Rector	Personal visit by Campaign Chair
Warrant, Harry and Julie								
Jones, William								

From Project Resource

PURPOSE OF A MAJOR GIFT STRATEGY

- Tailors request to the interests of the prospect
- Demonstrates the parish knows and listens to its congregants
- Uses research to determine an appropriate but challenging request
- Anticipates questions before they are asked
- Provides focus
- Gives solicitation team confidence
- Increases likelihood of success

ESTABLISH AN OVERALL PLAN

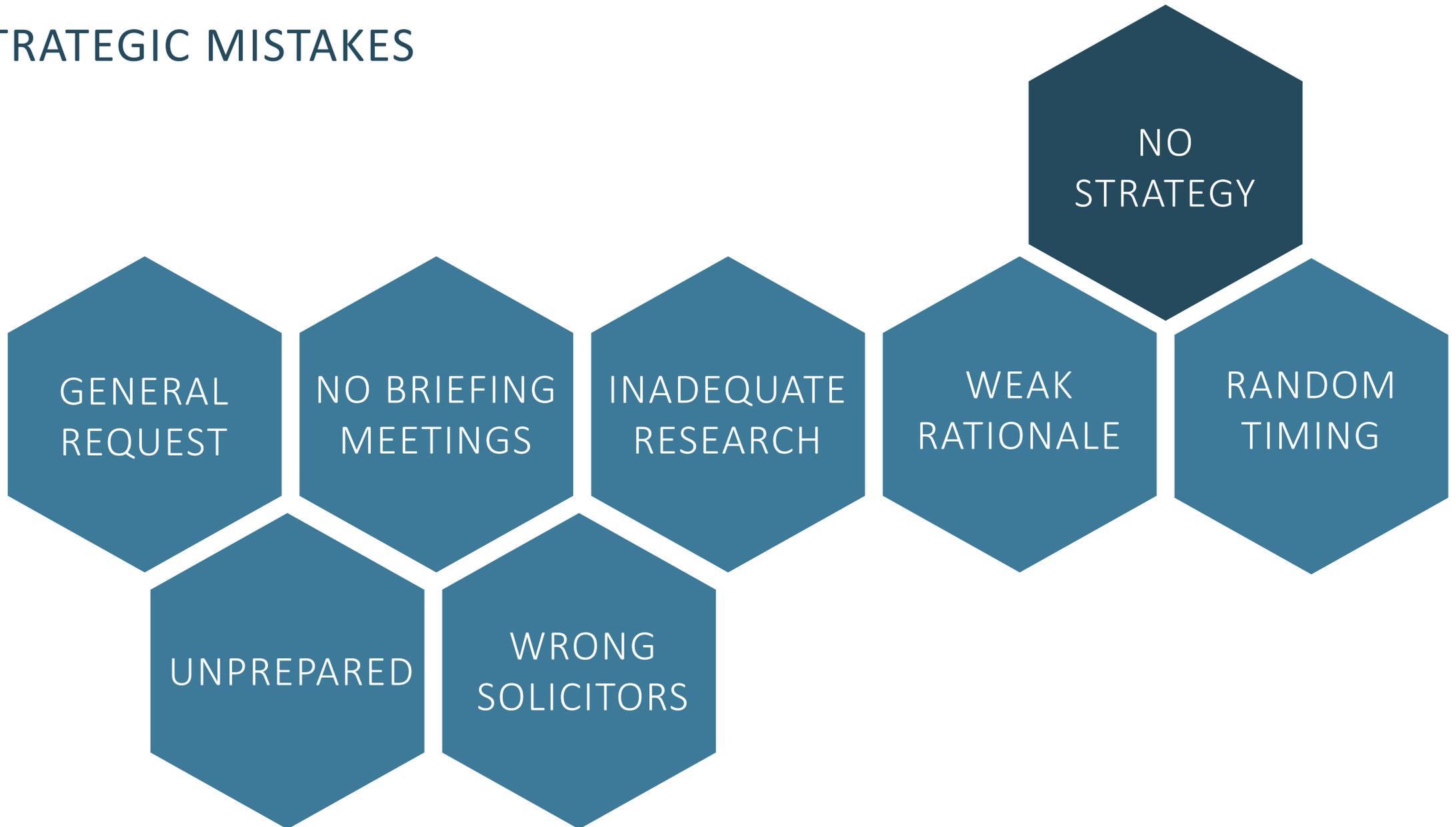
- In addition to monetary goals
- Set measurable, quantifiable activity benchmarks for a successful pipeline management program
- Evaluate program and individual performance against benchmarks



10 STEPS TO BUILDING A SUCCESSFUL MAJOR GIFT STRATEGY



STRATEGIC MISTAKES



NURTURING, NOT PRESSURING: CHECKING YOUR MOTIVATIONS AS YOU ASK FOR MAJOR GIFTS

1. Are you seeking gifts or relationships?
2. Are you seeking an accomplishment or a relationship?
3. Is not getting the gift right now in this “ask” meeting, a lose for you?
4. Are you making a pitch or are you hosting a conversation?
5. Are you trying to impose your will on the donor?
6. Do you ignore conflict or do you work towards mutual solutions?
7. Whose interests are more important? The church’s or the donor’s?
8. Are you willing for the conversation to take a turn towards pastoral care and away from the gift?

BEST PRACTICES FOR GIFT REQUESTS

- ✓ Each potential donor should have their interests fully explored through timely cultivation and briefing actions prior to a solicitation
- ✓ Clergy or peer-to-peer solicitation should be utilized whenever possible and prioritized over staff-initiated requests
- ✓ When not being requested by the priest-in-charge/rector, requests should be made by vestry members or other leadership volunteers who have made commitments equal to or above those they are requesting
- ✓ All solicitations should be made in-person or via video conference should be clear, precise, and carefully thought out to suit the donors' interests and capacity
- ✓ Pledges over a period of 3-5 years should be encouraged to enable the prospect's greatest gift
- ✓ A tailored prospectus with a specific gift request and recognition opportunity (if appropriate) should be developed and prepared for each potential major donor



DISCUSSION

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