



developing a **MAJOR GIFTS PROGRAM**

SHANE KOHL, CFRE & ERIN TYINK, CFRE

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THOUGHTFUL LEADER OF PEOPLE &
MATCHMAKER OF DONORS

introducing **SHANE KOHL**

He's had the honor of helping individuals and organizations express their visions and passions through giving for nearly three decades. He is a talented leader and mentor with endless coined phrases that stick.



**ASSOCIATE VICE
PRESIDENT OF
PHILANTHROPY**

**THEDACARE
FAMILY OF
FOUNDATIONS**



BUILDER OF RELATIONSHIPS & RADICAL
GRATITUDE EXTRAORDINAIRE

introducing **ERIN TYINK**

She uncovered her love of major gifts after wearing a number of hats in a variety of non-profits, from healthcare to basic needs. She's driven by meaningful relationships and the delight of thoughtful gratitude.



**REGIONAL
DIRECTOR OF
DEVELOPMENT**

**THEDACARE
FAMILY OF
FOUNDATIONS**





recognizing our
AUDIENCE



developing a

MAJOR GIFTS PROGRAM

YOUR ORG

Consider your organization's history, size, and scope. How do you define a major gift?

YOUR DONOR

Consider the individual's capacity and affinity. Then listen for what they'd like to get from your relationship with them.

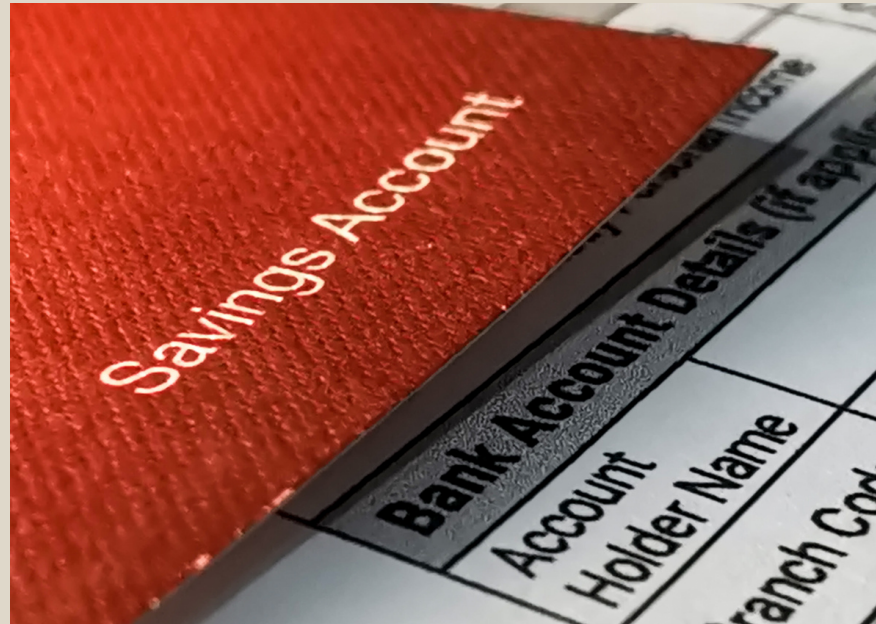
They aren't your donor... *You're their charity.* Let them lead the dance whenever you can.



DEFINING A MAJOR GIFT



FACE-TO-FACE



FROM SAVINGS



A MATCH WITH IMPACT



Valuable, not **VOLUME**

Major giving prospects should be a relatively small group of your organization's donors. This allows you to focus on meaningful relationship building.



how do you know if you've found a **MAJOR DONOR PROSPECT?**



PEER SCREENING

Ask for help! Get opinions & suggestions from your organization's best friends (think board, volunteers, advocates) about who to spend your time with.



USE CONTEXT CLUES

Look around for indicators of wealth: the address on the check, the car they drive, the things they spend their time doing.



DON'T WASTE TIME - DISQUALIFY!

Move folks out of the major donor pool if they aren't a good fit. Spend your time with the ones that are!



ASK THEM

Get good at asking thoughtful qualification questions (this is going to come up again and again).

SOME REMINDERS

You don't need to be coy or shy about this.

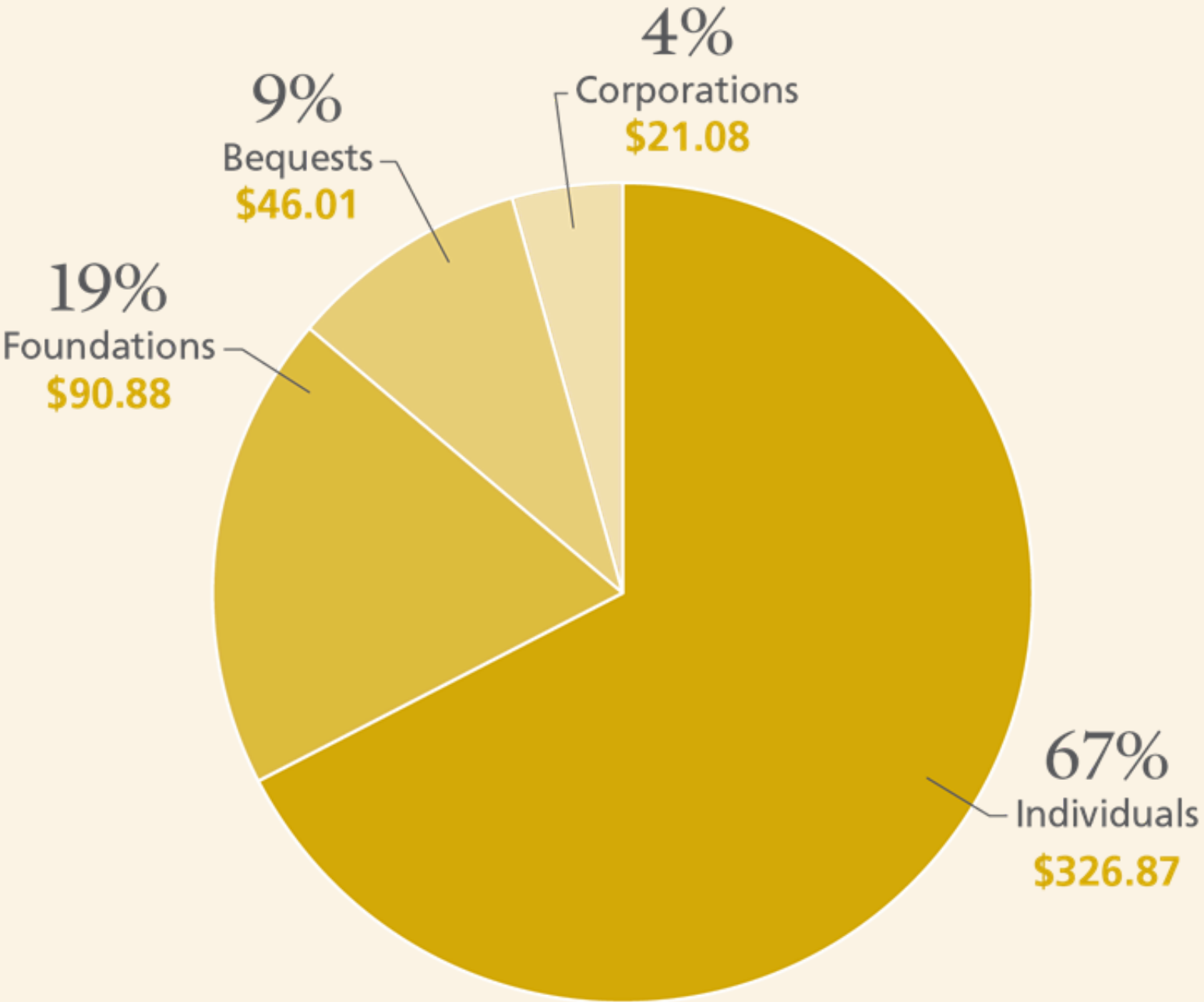
This is what you're paid to do. You work for an organization that needs philanthropic support – go get it!

Don't spend too much time on corporations and sponsorships.



2021 contributions: \$484.85 billion by source of contributions

(in billions for dollars – all figures are rounded)





once you find a major donor,
WHAT DO YOU DO WITH THEM?

be a devout **LISTENER**

Everyone has a great story, if you listen closely enough.

- What inspired your first gift to us?
- Where did you learn to be so generous?
- What kind of project would make you consider increasing your support?
- Tell me about the best gift you've ever given (or received). What made it special?



when is the right time to **MAKE THE ASK?**

This one is pretty subjective, but there are some things to consider...

DO YOU NEED IT?

HAVE YOU SAID THANK YOU?

THEN STOP WAITING!



DO YOU NEED IT?

Do you have a strong case statement?

Can you explain to the donor what you'd be able to do with their support that you can't do without it?

What will the impact of their gift have?



HAVE YOU SAID THANK YOU?

We have to explain to the donor how we've used their last gift before we've earned the right to ask them for another one.

Have you done the work to make them **feel good** about the gifts they've already made?



THEN STOP WAITING!

Just like anything else, there is rarely a 'perfect' time. If you have a strong case statement, you understand their passions & interests, and they have capacity...

Now is the time. If you don't, someone else will.





but, how do I know
HOW MUCH TO ASK FOR?

You can use context clues (gifts to other organizations, previous giving to you, etc.). Ultimately though, this is more art than science so you can make a judgement call here.

WHAT IF IT'S NOT THE RIGHT AMOUNT?

Don't fear. The donor will tell you if you've overshot. There's even some research that says this is flattering to donors.

But don't sweat it if you leave money on the table. This isn't the last opportunity you'll have to engage the donor.





the anatomy of
A MAJOR GIFT ASK

SETTING THE STAGE

Make the meeting brief.

Tell them why you're coming to see them.

Go somewhere private that they are familiar with (home, office, etc.).

Include the right decision makers (don't ignore their spouse!)

Bring along a natural partner.



THE MEETING ITSELF

First 5 minutes: small talk. What's the weather like? How'd the Packers do? (You might be nervous... take some time to shake it off)

Next 5 minutes: review the project. Describe what you've learned & noticed from your previous conversations.

Get the natural partner's endorsement.

Say the magic words.



THE ASK

(donors names), can we count on you for a
(lead/major) gift of \$XXX to support (the
project name/impact)?

own the silence.





and, what happens if **THEY SAY "NO"?**

Ask some questions and **keep listening**. Was it the wrong project? Bad timing? Too much?

What would need to be different to get a yes?

If you're not hearing no, you're not asking enough.



what happens if **THEY SAY "I DON'T KNOW"?**

This is a popular answer; you've done nothing wrong.
In fact, it's a great sign that you're in the right ballpark.

But remember, urgency is your friend – **don't leave without scheduling a follow up.**



what do I do

WHEN THEY SAY "YES"?

hug them. say thank you! congratulations on securing a major gift.

stewardship & **RADICAL GRATITUDE**

Think about the best gift-giver
you know. What makes their
giving **so great?**



THE TEA DRINKER WHO'S WIFE LOVED GARDENING

be very **INTENTIONAL**

- Find ways to show them you've heard what's important to them. Are you using the right natural partner? Giving them the right access? The right exclusivity?
- Help yourself remember: take notes!



**MEANINGFUL &
PERSONALIZED**



**AUTHENTICITY
MATTERS**



AUTHENTIC
MEANINGFUL
UNEXPECTED



The basics are required, but radical gratitude goes above and beyond, and separates the good organizations from the great ones. It's the kind of gestures that the donor talks about with their friends.

BUILDING A MAJOR GIFTS PROGRAM: A ROADMAP

1. Figure out who your existing major donors are. Get to know them.
2. Build a list of prospects who you'd like to add to your list. Start with the people closest to you.
3. Make new friends. Add them to the list.
4. Thank them often. And be genuine.

GETTING TO THE NEXT "YES".

Make the next step bite-sized and attainable.

For example:

Mary and I met today at her home. We discussed the renovation project on campus and I confirmed that it was moving along on schedule and within budget. She mentioned again that she is most interested in helping retain qualified staff.

Next steps: *invite her for a tour before the emergency department opens in May; secure a meeting with the manager to discuss the nurse residency program.*

Potential Funding Opportunity: *\$50,000 for Nursing/Clinical Education*



you already
know your best
prospects

**DON'T
OVER-
THINK
IT**

**GREAT
STEWARDSHIP**

makes this easier. and more fun.

**MAKE MORE
ASKS.**

you've gotta start
somewhere.

fundraising is a

**CONTACT
SPORT**

it happens face-to-face

Does your donor
feel like a

HERO?



any
QUESTIONS?



SHANE KOHL, CFRE

Associate Vice President of
Philanthropy, ThedaCare
shane.kohl@thedacare.org

o: 920.454.1252

ERIN TYINK, CFRE

Regional Director of
Development, ThedaCare
erin.tyink@thedacare.org

o: 920.454.1253



thank you!