

Major Gifts and Moves Management

Your Goal

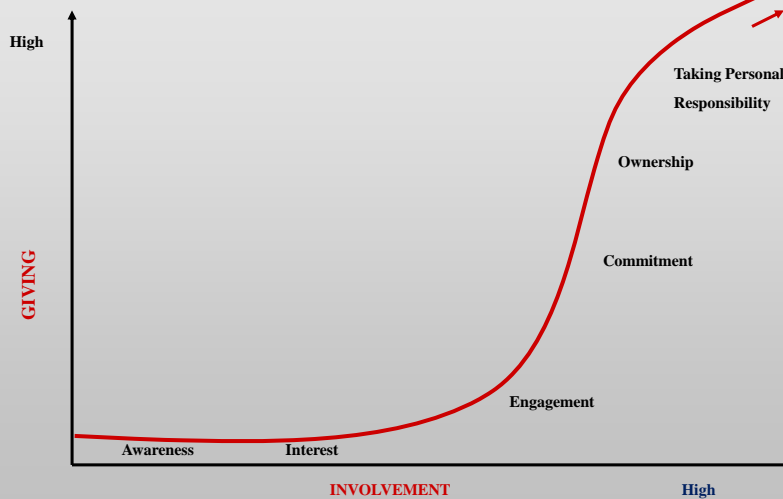
- Determine the Rights, especially the Right Purpose
- Get a yes to purpose before seeking an amount!
- Uncover the Donor Puzzle through strategic conversations!

The Donor Puzzle

- “Right” purpose
 - “Right” amount
 - “Right” solicitors
 - “Right” time
 - “Right” place
 - “Right” participants
 - “Right” materials
- Capacity, inclination, readiness
 - Motivation, values and interests
 - Where on Tarnside Curve
 - Knowledge, impressions of your institution
 - Where your org is on his or her list; what orgs on top and why
 - Philanthropic decision makers, process, priorities
 - Natural partners
 - Issues
 - Stewardship and Engagement Preferences

The Tarnside Curve of Involvement

*Developed by Patrick Boggen, Tarnside Consulting, UK



Building Transformational Donor Relationships

- Driven by the values, needs and motivations of the donor
- Managed through the donor cycle.
- Key person responsible for maximizing that donor's relationship with the institution

Donor Cycle

Identification and Rating

Discovery and Research

Strategy Development

Strategic Engagement

Solicitation and Closing

Thanking and Recording

Stewardship and Strategy Development

Intentional and Strategic

- 4 to 7 strategic steps or “moves” over 6 to 18 months



Donor Initiatives or “Moves” Increase Motivation and Overcome Objections

Motivation
Engagement

Objections
Engagement

Measurable
Has Built in Follow-up

Need a Suite of Engagement Opportunities

High Touch Long Term

Offline

High Touch Short Term

Offline
Online

Low Touch Short Term

Offline
Online

Determine 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	Provides high level advice	Provides high level expertise
3 points	3 points	8 points	4 points	4 points

*Based on the experiences and behaviors of your donors

HNWI 2014 Study* *Bank of America, University of Indiana

- 98.4% gave (65.4% general population)
- 75.1% volunteer
- 14.3% as a family
- 44.4% using their professional expertise

Factors*

*Bank of America, University of Indiana 2016, High net work donors w/\$200K+ income and \$1,000,000 in liquid assets

- | | |
|-------------------------------------|---------------------------|
| • Attending religious services | • \$111,137
– \$76,112 |
| • Volunteering | • \$124,267
– \$35,127 |
| • Using professional expertise | • \$158,194 |
| • Engaging children in philanthropy | • \$243,935 |

Collect “Yeses” Along the Way

1. To your institution being high on the donor’s list
2. To knowing and trusting the CEO
3. To passion for the vision and trust in the plan
4. Is aligned with values
5. Believes that the organization needs philanthropy (doesn’t think the government or a few big donors or the huge endowment is enough)
6. Concerns addressed
7. To PURPOSE & IMPACT

Develop Written Strategies

- **Motivation** – what will you (or someone) do by when to increase the donor’s motivation through engagement and strategic conversations
- **Obstacles** – what will you (or someone) do by when to neutralize or eliminate possible obstacles to a yes prior to solicitation

How will you deepen meaningful and productive engagement
How will you determine The Rights

Track the Moves

Name	Capacity	Inclination	Readiness	Next Move	Date	Who

A move isn't necessarily a next step
Not a Move: "Make appointment" "Send invitation"
Has to meet the criteria

Ask When The Rights are Lined Up!



The Upside Down Triangle[©]

Yes to Institution

Yes to CEO Vision, Plan

Yes to Role of Philanthropy

Yes to Concerns
Addressed

Yes to Scope,
Purpose

**Would you
consider...?**

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- Questions? Email me at sethr@goteamimpact.org

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