



Fundraising Workshop

Secure Major Gifts & Transform Your Nonprofit



InstantPoll

What's your fundraising target for 2025?

On a scale of 1-5, how confident are you in fundraising?

Share your answer in the comments!





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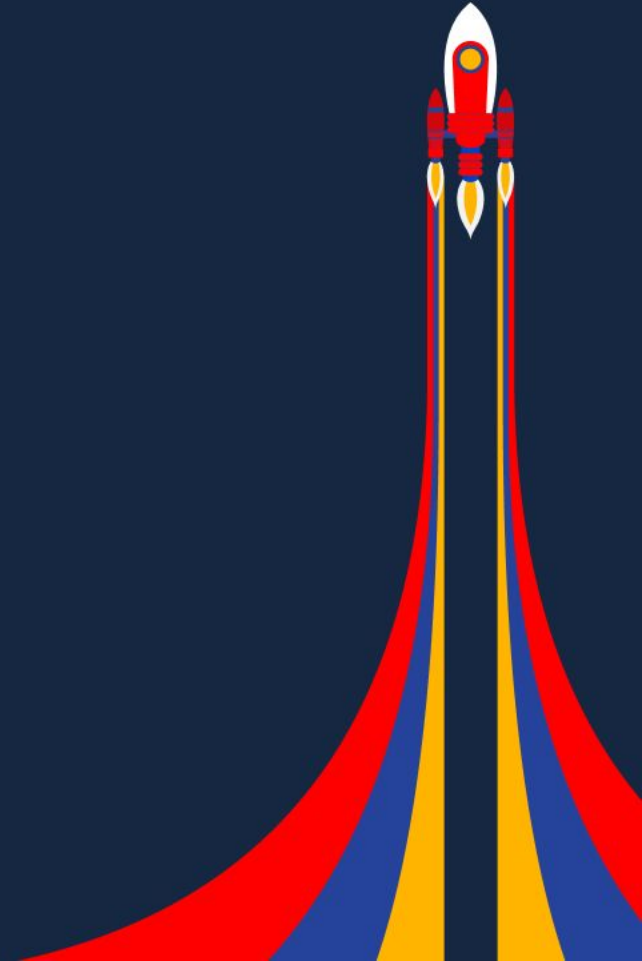


What to Expect in This Workshop

- **We'll take you from square one to your first handful of donations.**
 - **Workshop Exercises:** Activities created to begin putting the "puzzle" together.
 - **Key Principles:** Defining a new MINDSET for successful fundraising.
 - **Takeaway Resources:** Resources and tools to take with you beyond the Workshop!

Let's get into some...

Mythbusting





Three Common Fundraising Myths

- **Myth of Scarcity:**
 - There's not enough money out there.
- **Myth of the "Natural-Born Fundraiser"**
 - Some people are built to be better fundraisers.
- **The Myth of Mission vs. Relationships**
 - People only give because they care about your mission.



Fighting Myths with Fundraising Truths

- ~~Myth of Scarcity:~~
 - Truth: There's plenty of money available.
- ~~Myth of the "Natural Born Fundraiser"~~
 - Truth: Fundraisers are made, not born.
- ~~The Myth of Mission vs. Relationships~~
 - Truth: People give to early-stage nonprofits because of relationships, not mission.

2023 Giving USA Report (FY2022)

\$499.33 billion

In 2022, Americans gave \$499.33 billion to charity, a 3.4% decline compared to 2021. Adjusted for inflation, total giving declined 10.5%.

Where did the generosity come from?

Contributions by source
% share of total

64% \$319.04 billion

Giving by Individuals

↑ declined by 5.4% over 2021

21% \$105.21 billion

Giving by Foundations

↑ increased 2.5% over 2021

9% \$45.60 billion

Giving by Bequest

↑ increased 2.3% over 2021

6% \$21.08 billion

Giving by Corporations

↑ increased 3.4% over 2021



*95% of the total giving reported - provided source information. Items were not included in 2022, 2021, and 2020 reports. All values are in U.S. dollars.

Where did the charitable dollars go?

Contributions by destination



Donor-advised funds are getting the fastest growing rates of giving. Learn more about where gifts from DAFs go in the chapter on donor-advised funds.

Giving to international affairs organizations grew by 10.9% in 2022, in part due to donors responding to world events. Despite uneven results in 2022, 5% of time-submitted amounts to exceed pandemic lows, even when adjusted for inflation.



First we need to answer...

What is a Major Gift?





What Is a Major Gift?

- **Definition:** A personally cultivated direct request for a larger gift that drives the mission and organizational objectives.
 - Major Gifts typically refer to gifts of at least \$5,000.
 - Your threshold may be different depending on various factors such as annual budget, goals, etc.



Instant Activity

Using your major gifts fundraising goal, calculate what a major gift looks like for you.

- An easy Rule of Thumb is to take 0.5-1.0% of your total major gifts fundraising goal, up to \$500K.



And now we can...

Create a Donor Table





Donor Tables 101

- **Definition:** A framework providing a strategy for the number of gifts needed to meet fundraising goals.
 - **Purpose:** Calculate gift amounts & fix a number of prospects and fundraising asks.
 - All this occurs before looking for actual donors.

Sample Donor Table

# of Gifts	Gift Amount	# of Prospects	# of Asks	Total Giving



Instant **Activity**

Set your major gifts fundraising goal.

- Can be based on your annual budget, a major project, program, or hypothetical.
- Knowing this number will help you get the most of the Workshop.



Sample Donor Table: Setting Your Goal

# of Gifts	Gift Amount	# of Prospects	# of Asks	Total Giving
				\$100,000

Sample Donor Table: Gift Breakdown

# of Gifts	Gift Amount	# of Prospects	# of Asks	Total Giving
	\$25,000			
	\$10,000			
	\$5,000			
	\$2,500			
	\$1,000			
				\$100,000

Sample Donor Table: Gift Breakdown

# of Gifts	Gift Amount	# of Prospects	# of Asks	Total Giving
1	\$25,000			\$25,000
2	\$10,000			\$20,000
4	\$5,000			\$20,000
8	\$2,500			\$20,000
15	\$1,000			\$15,000
30				\$100,000

Sample Donor Table: Prospects & Asks

# of Gifts	Gift Amount	# of Prospects	# of Asks	Total Giving
1	\$25,000	5		\$25,000
2	\$10,000	10		\$20,000
4	\$5,000	20		\$20,000
8	\$2,500	24		\$20,000
15	\$1,000	45		\$15,000
30		104		\$100,000

Sample Donor Table: Prospects & Asks

# of Gifts	Gift Amount	# of Prospects	# of Asks	Total Giving
1	\$25,000	5	2	\$25,000
2	\$10,000	10	4	\$20,000
4	\$5,000	20	8	\$20,000
8	\$2,500	24	16	\$20,000
15	\$1,000	45	30	\$15,000
30		104	60	\$100,000

Completed Sample Donor Table

# of Gifts	Gift Amount	# of Prospects	# of Asks	Total Giving
1	\$25,000	5	2	\$25,000
2	\$10,000	10	4	\$20,000
4	\$5,000	20	8	\$20,000
8	\$2,500	24	16	\$20,000
15	\$1,000	45	30	\$15,000
30		104	60	\$100,000



Instant Activity

Create Your Own Donor Table!

- Using the provided template, fill out your fundraising goal, create brackets of major gifts, and begin inputting the number of gifts, prospects, and asks needed.





Major Gift & Donor Activity Roundup

1. Define a Major Gift in Your Context

- Based off of your current goals, what does a major gift look like for you?

2. Set Your Fundraising Goal

- What's a reasonable goal? This can be for the year, your next project, or a hypothetical example if you're unsure.

3. Create a Donor Table

- Use the Handout to Create a personalized donor table based on the previously established fundraising goal.

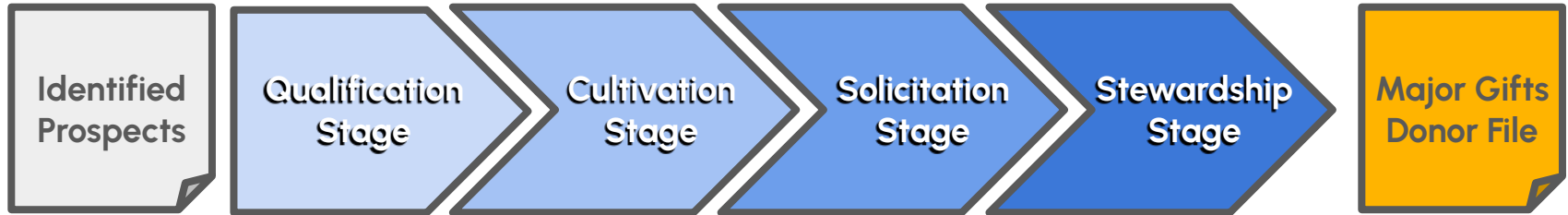
Finally we'll discover the key to...

Securing Major Gifts

Moving Prospects from
"Interested to Invested"



The Stages of Giving: **Active Portfolio**



All Prospects Start at...

Donor Identification





Stages of Giving: Identification

- **Definition:** The evaluation of prospective donors according to probability of giving.
- Taking the time to find the *right* donors will make your fundraising efforts more effective.
 - Skipping this step often results in frustration and the false notion of failure.

Who Are My Donors?

- The “Four F’s” tell us where to begin looking for potential donors or supporters when starting major gifts fundraising.
- Imagine 4 concentric circles of supporters.



The Four F's: Family

Recall: People initially give to a nonprofit startup because of relationships.

- **Circle 1: Family**



The Four F's: Friends

- Circle 1: Family
- Circle 2: Friends



Who Are My Donors? The Four F's:

- Circle 1: Family
- Circle 2: Friends
- Circle 3: Fans



Who Are My Donors? The Four F's:

- Circle 1: Family
- Circle 2: Friends
- Circle 3: Fans
- Circle 4: Followers





Instant Activity

Begin Your Donor Prospect List

- **Use the Template to Build Your Donor Prospect List**
 - Brainstorm a list of everyone and anyone who might give. Begin with your inner circle and work out.



Evaluate Potential with...

Donor Qualification





The Stages of Giving: Qualification

- **Goal:** To determine if an identified prospect is willing to engage in a philanthropic relationship with the organization.
- **For this Workshop:** Taking prospects from the "Holiday Card List" easily covers the qualification stages, as these people should be already open to having a conversation with you.

Donor **Qualification Equation**



Donor **Qualification: Capacity**



Capacity

- **Criteria:**
 - Capable of making a single gift of \$5,000+
- **Wealth Indicators**
- **Research Tools**
 - Your own knowledge of the prospect

Donor Qualification: Propensity



Propensity

- **Criteria:**
 - Demonstrated philanthropy:
 - At the \$5,000+ level
 - To similar causes
- **Propensity Indicators**
 - Previously made gifts
- **Research Tools**



InstantActivity

Organize Your Donor Prospect List

- **Rank Your List of Prospects**
 - Organize your list of major gift by qualification
 - (i.e. capacity and propensity levels).



Form relationships through...

Donor Cultivation





The Stages of Giving: Cultivation

- **Goal:** To execute actions that build relationship with a prospect, to achieve the following:
 - Relational comfort with YOU
 - Credibility with the ORGANIZATION
 - Determine the right project
 - **Determine the right amount to ask (good practice with family and friends)**
 - *Start with your gut.*
 - *Consider their lifestyle (e.g. How often to do they buy Starbucks, go out to eat, etc?)*

When it's time, make the...

Donor Solicitation





The Stages of Giving: Solicitation (The Ask)

- **Goal:** To secure the gift
- **Guidelines:**
 - **Number of actions:** 1-4.
 - **Nature of actions:** To submit a gift proposal, clarify questions, and finalize terms.
 - **DROP:** If unresponsive after 4 contacts.
 - **MOVE:** When the gift arrives.



Instant Activity

Create and Use Your Donor Portfolio!

- Using the provided Donor Portfolio template, choose 10 identified prospects from your Four F's list and label them "Active" under the Qualification Stage.
- Set a goal to contact all 10 prospects to request a meeting and move them along the stages of giving.



Missional vs. Relational Giving Mindset

