

Fundraising Workshop Resources & Workbook





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What to Expect

In this Workshop, we'll take you from square one of major gifts fundraising to giving you everything you need to get your first handful of donations. Everything in this Workshop and Workbook comes from our proven A to Z method of starting your own Major Gifts Fundraising program outlined in our Iconic Income course. You can sign up for that training at <https://www.instantnonprofit.com/iconic-income>.

Our Workshop will cover three main areas to help you start the journey to becoming an Elite Major Gifts Fundraiser. These areas are **Workshop Exercises** (hands-on activities we'll do together to begin putting the "puzzle pieces" of fundraising together), **Key Principles** (the defining characteristics and MINDSET behind all successful fundraisers), and **Takeaway Resources** (toolkits and templates to take with you beyond the Workshop)! Everything we'll cover can be scaled to your Major Gifts Fundraising program.



Mythbusting

There are **three common myths** that can often be an obstacle to fundraisers early on. We'll bust each of these through revealing the truths of philanthropic trends, donor relationships, and fundraising principles.

The Myths:

- **The Myth of Scarcity:** The idea that there's not enough money to go around.
- **The Myth of the "Natural-Born Fundraiser":** The idea that some people are simply better fundraisers by nature.
- **The Myth of Mission vs. Relationships:** The idea that people only give because they care about your mission.

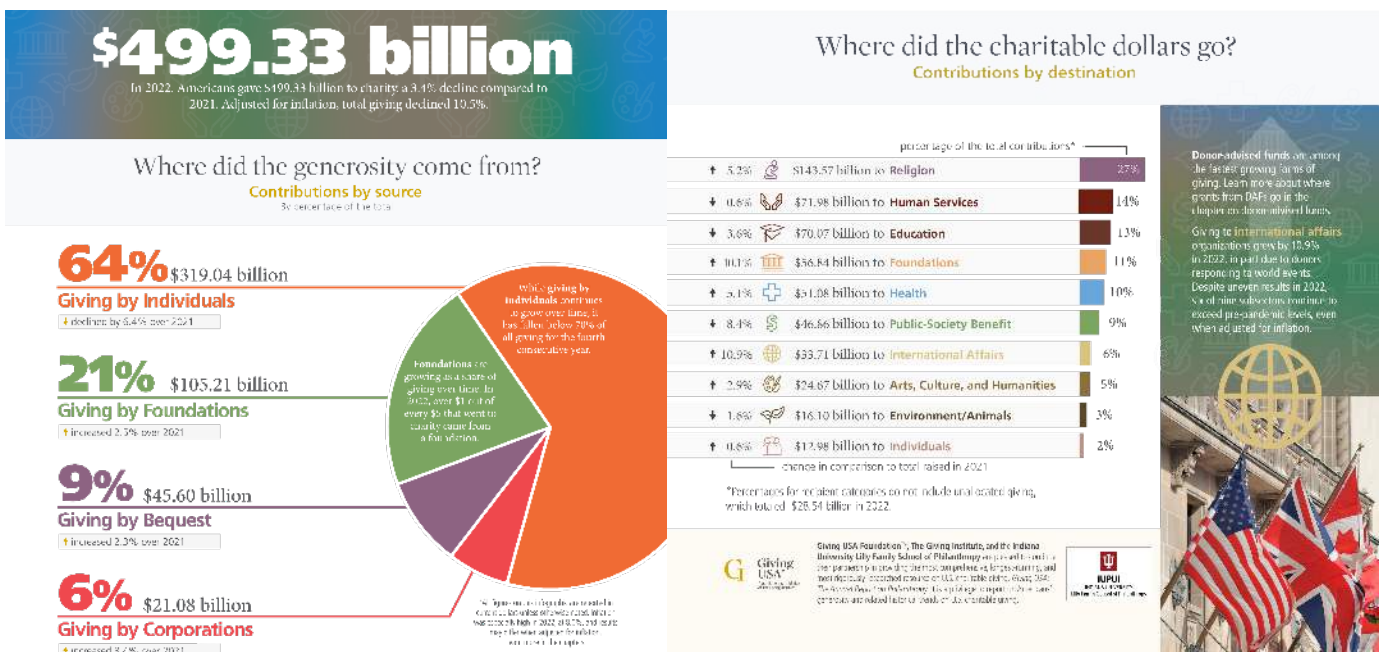
The Truths:

- **There's Money for Everyone:** Giving USA's Annual Giving Report showed nearly half a trillion dollars given to philanthropic causes and nonprofit organizations.
- **Fundraisers Are Built, Not Born:** Fundraising is a process that anyone can learn and master to be an elite fundraiser.
- **Relationship Matter:** People give to early-stage nonprofits because they have a relationship with the founder/fundraiser, not because of the mission.

Major Gifts

Thriving nonprofits rely on Major Gifts given by individual donors (individual people, corporations, foundations, etc). A **Major Gift** is defined as 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. However, an organization's threshold for a Major Gift may vary depending on factors such as annual budgets, projects, programs, or goals. An easy **Rule of Thumb** to set your major gifts fundraising goal is to take 0.5-1.0% of your total major gifts fundraising goal, up to \$500K.

To help get the big picture of major gifts giving, check out Giving USA's Annual Giving Report that shows how much was given last year to nonprofit organizations, where the money came from, and where the money went categorized by various causes.





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

My Donor Table Template

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

Stages of Giving


There are **Five Stages of Giving** that bring donor prospects through your donor portfolio. Each stage serves a specific purpose and their function should be understood to effectively lead donors through the process.

Stage 1: Identification - Major Gifts only happen when we're able to **identify potential donors** who can provide them. When you first start your fundraising efforts, it's helpful to start with the **Four F's**. These are **Family, Friends, Fans, and Followers**. You can imagine these groups as four concentric circles, with the innermost circle being the people closest to you, working out to your broader network and audience. The idea is to start with the people closest to you and work your way out from there. If the relationship is already established (e.g. They're on your "Holiday Card List"), it's easier to begin a conversation about giving.

Stage 2: Qualification - Once you've identified prospective donors, we need to determine the likelihood of them giving to your organization. To do this, we use the "Donor Qualification Equation", as seen below.



Capacity is a donor's capability to make a single gift of at least \$5,000. **Propensity** is a donor's demonstrated philanthropic giving (previous gift of \$5,000 to a similar cause).



As you move to circles that you don't have a relationship with, this process is often called **Donor Prospecting**, and follows many of the same steps and guidelines. Donor prospecting is defined as the evaluation of prospective donors according to the probability of giving. Taking the time to find the right donors will make your fundraising efforts infinitely more effective.

Stage 3: Donor Cultivation - No matter who you're asking a major gift from, relationships are important. While the people on your "Holiday Card List" should all have an established relationship with you, people outside of your family and friends will need to be cultivated. During this stage, you'll take steps to getting donors relationally comfortable with you, will build credibility with the organization, and determine the right project to share with them and how much to ask. When starting with your family and friends, it's a good idea to start by trusting your gut. What seems reasonable to ask that relative or friend? How often do they go out to eat or pick up coffee on the way to work? You'll likely have an idea of their ability to give before even asking.

Stage 4: Donor Solicitation - If a donor has worked their way through all of the previous stages and wants to continue talking, they're ready for donor solicitation. The goal of this stage is to secure the gift. This will typically happen with the submission of a gift proposal, as well as open up the door to answer any final questions before finalizing the terms of the gift.

Stage 5: Donor Stewardship - Moving forward, there are steps you can take to continue building your relationships with donors. We dive deeper into this in our Iconic Income Major Gifts Fundraising course.



Donor Portfolio Template

First Name	Last Name	Phone	Relationship	Org/Company	Stage

*View the digital version of this resource to see a more detailed version of the portfolio.



Additional Resources

APPOINTMENT SETTING SCRIPT:

[Always smile, even though the person cannot see you. They can tell!]

Hello, this is [your name]. Have I reached [their name]? **YES / NO**

How are you [first name]? ***Answer*** Good. I'm glad to hear it! [Or sorry to hear that - let me see if I can brighten your day a bit.]

(Very brief small talk - don't go on!)

Am I reaching you at a good time? ... [OPTIONAL VELCRO ADD: "When is it ever a good time, right?"]


The reason I am calling is that I know you [mention shared community/interest/cause, relationship connection etc.], and I want to acknowledge you for that.

I think we all can say we care about [cause] - and that is a set of values I deeply share with you.

[If they may not know you've started a 501c3, you can use the following]

I wanted to let you know I've decided to do something big - by starting a nonprofit that will actually address the problem of [cause] - and I've discovered some eye-opening things in the process.

I want to respect your time today - what I would like to do is buy you a coffee and get your feedback on our plans to [execute mission of _____], and share what we've already done to start that process.



Do you mind if I share some dates with you to see when it would be convenient to get together? **YES**

Great, thank you.

[IF YES, SET APPT AND SAY YOUR GOODBYES]

[IF THEY CANNOT GET TOGETHER, SET A TIME TO PRESENT YOUR PLANS BY PHONE - AND IF THEY WANT TO DO IT NOW, MAKE SURE THEY HAVE ENOUGH TIME (say, 30 minutes) AND CONTINUE WITH "FUNDRAISING BY PHONE" SCRIPT]

Three Possible Outcomes [Structure]

1. DESIRED/YES: They set a meeting time and date
 - a. Stop selling/talking
 - b. Nail down the time, repeat it
 - c. Confirm ALL contact info (even if you think you have it - is there alternate email? Phone? Assistant? Spouse?)
 - d. Ask if they have someone who manages their schedule, and if any other decision maker; if anyone else should be in attendance
 - e. Book on your digital calendar & send invite
 - f. Send follow-up / confirmation email
2. MAYBE: They say maybe but they are unable to schedule an appointment right now
 - a. Ask for a tentative time just to "get something penciled in"
 - b. Get a good time to call back and confirm
 - c. Ask if they have someone who manages their schedule
 - d. Repeat back the window or specific time and day to call back
 - e. Send a follow-up email
3. NO: They say no or they are unavailable in the near-term
 - a. Retreat to asking for a small donation
 - b. If no, retreat to suggesting sending info (they will always say yes)
 - c. Send donation request materials
 - d. Follow up (via volunteer if possible) later



DONOR QUALIFICATION EMAIL

Dear (Prospective Donor's Name),

My name is (insert your name) and I'm hopeful you remember me from (connecting event). We talked briefly about my dream of (share consolidated mission statement). You provided some great feedback and I left our brief encounter even more motivated to put the dream into action.

I would be deeply grateful for the opportunity to meet with you, even briefly, to inquire about ways in which you might be willing to help advance our shared mission.

Please let me know what may work for you in the next few weeks and I'll make it happen.

Sincerely,
(Your Name)



APPOINTMENT CONFIRMING EMAIL TEMPLATE

Subject: Confirming Our Appointment

Dear (Prospective Donor's Name),

Thank you for your willingness to meet with me and learn more about solving [problem] - I am excited about our appointment!



Date: [Appointment Date]



Time: [Appointment Time]



Location: [Meeting Location or Online Link]

During our meeting, I look forward to sharing with you the incredible progress our nonprofit is executing to make a positive impact for (insert cause).

If there's anything specific you'd like us to cover during our time together or if you have any questions beforehand, please don't hesitate to let me know. Your insights and perspective are highly valued.

Looking forward to our meeting on [Appointment Date]!

Warmest regards,

(Your Name)

(Your Title/Role at Nonprofit)

(Nonprofit Name)

(Your Contact Information)



GIFT PROPOSAL TEMPLATE



Gift Proposal and Program Overview

Prepared for
Philip Walsenburg
April 30, 2023

Introduction

Org Name is honored to have such passionate and committed partners. Our shared mission is noble: to increase the role of philanthropy in our society. I deeply appreciated both the time you've given me and, more importantly, the depth of engagement you've offered. As we discussed, below is a proposal for your consideration. Included are the potential funding opportunities, gift details, and expectation for the impact of your gift.

Mission


[Org Name] seeks to inspire generosity in the world by challenging and equipping the professional fundraiser.

Gift Opportunities.

- Feed the Children Awareness Drive
 - Project Description: XXXX
 - Project Goal: XXXXX
 - Program Cost: XXXX

- Save the Whales Plastic Cleanup Program
 - Project Description: YYYYY
 - Project Goal: YYY
 - Program Cost: YYYY

Gift Overview:



1. Feed the Children Awareness Drive 2023-2024 / \$50,000 total	\$25,000 annually / 2 years,
2. Save the Whales Plastic Cleanup Program 2023 / \$50,000 total	\$50,000 one-time gift /
TOTAL:	\$50,000 in 2023 \$25,000 in 2024 \$75,000 TOTAL

Conclusion

Philip, you can make a lasting impact on the world of philanthropy by inspiring others to inspire generosity. Planet Protectors believes the future of philanthropy is bright, but only if we act now and work together. We are humbled by your friendship and partnership and would be honored to partner with you on your philanthropic goals



DONOR INFORMATION

Name: Philip Walsenburg
Address: 123 Colorado Blvd.
Denver, CO 80206

Phone: 303-111-1111
Email: Philip@something.com

PLEDGE INFORMATION

I am pleased to confirm my pledge of \$75,000 to [Org Name] to be divided each year as follows:

- \$25,000 to the XXXX Drive
- \$25,000 to the YYYYYY Program

ACKNOWLEDGMENT INFORMATION

I would like to be listed as a friend of [Org. Name] in your publications:

- o YES, please list me as follows: _____
- o NO, please keep the gift anonymous

I would like to honor someone with this gift:

- o YES, please honor _____ on your [Org Name] honor wall

Philip Walsenburg

Date _____

([Name], Founder & President)

Date _____



DONATION THANK YOU LETTER TEMPLATE

<Organization Name>
<Organization Address>
<City, State Zip>

<Date>

<Recipient Name>
<Recipient Address>
<Recipient City, State Zip>

Dear <Name>,

Heartfelt thanks for your generous donation! I appreciate your support for our work to (ENTER PROBLEM YOUR ORGANIZATION IS SOLVING).

Here at <ORGNAME>, our goal is to make sure that <BRIEF MISSION STATEMENT>.

Your generous donation of \$<AMOUNT> will go a long way to helping in that effort!

Our EIN number, should you need to make that reference for purposes of tax deductibility, is <EIN NUMBER>.

<NAME>, thank you once again for your donation. It means the world to us!

With gratitude,

SIGNATURE
<SIGNER NAME>
<SIGNER POSITION>



Space for Notes
