

A stylized graphic of a rocket launch is positioned on the left side of the image. The rocket is red and white, pointing upwards. It leaves a long, narrow trail of yellow and red, which widens as it goes up, creating a sense of motion and energy. The background is a solid blue color with a large, curved red and yellow shape on the right side, suggesting a rising sun or a large arc.

March 12th Coaching Session

Secure Major Gifts & Transform Your Nonprofit



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!



Where should we focus our

Philanthropic Efforts?



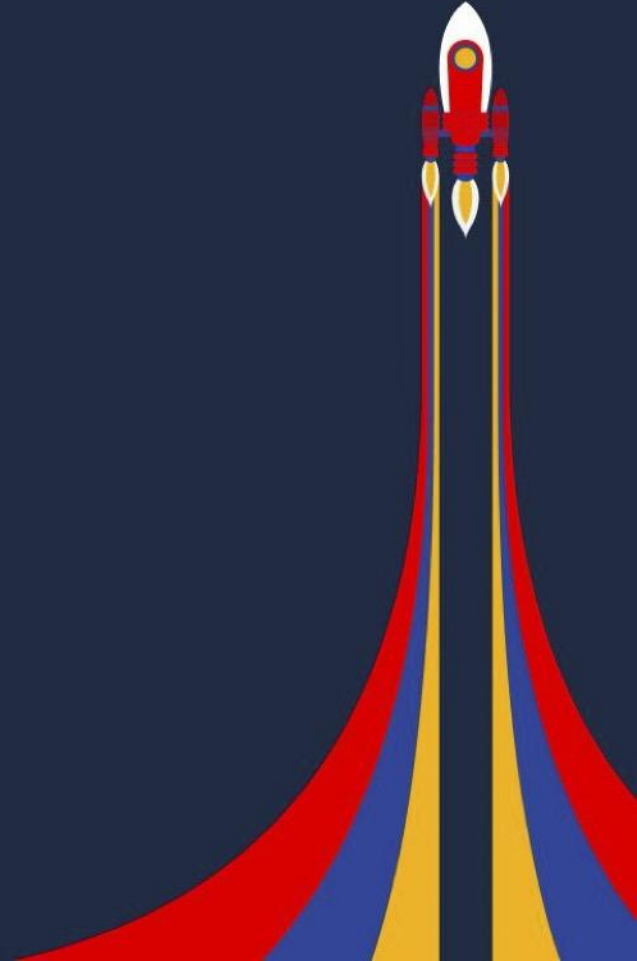


Effective Philanthropists...

- Understand the fundraising mindset
- Are excellent storytellers
- Set fundraising targets and know the organization's mission
- Identify, invest, and inspire potential donors
- Utilize tools to help steward their portfolio
- Track and measure their success
- *Are authentic*
- *Have grit*

Let's get into some...

Mythbusting





Three Common Fundraising Myths

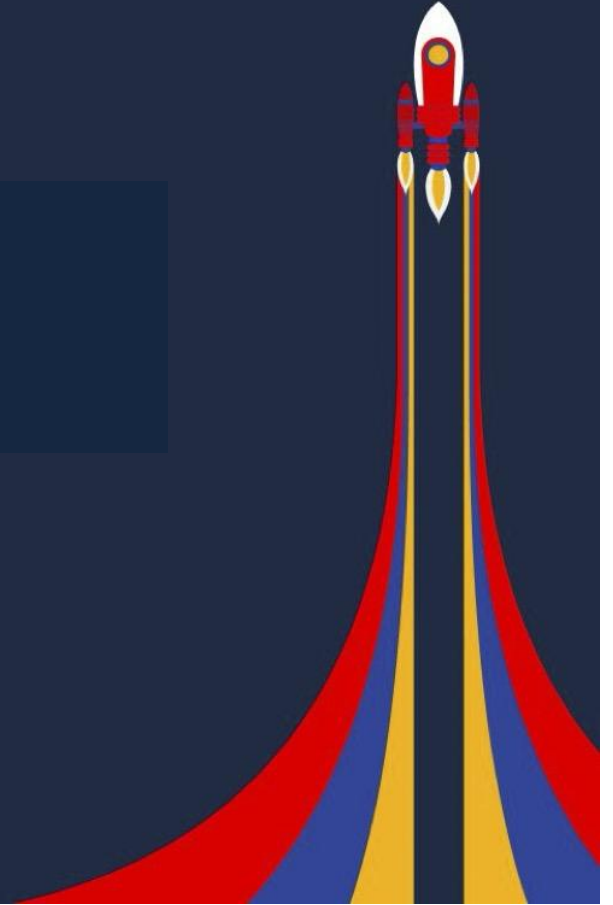
- **Myth of Scarcity:**
 - There's not enough money out there.
- **Myth of the "Natural-Born Fundraiser"**
 - Some people are built to be better fundraisers.
- **The Myth of Mission vs. Relationships**
 - People only give because they care about your mission.



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.

What are the top ways to
Fundraise?



We must raise money...but how?

Lots of confusing “experts and opinions” out there.
Let’s review the top 5:

- Crowdfunding (online)
- Grant writing
- Events: Public presentation, dinners, auctions, etc.
- “Outbound” Marketing: Email, direct mail, and phones
- A “Major Gifts” Program

Identifying and Activating
Donor Support





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:

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





Just a bit of homework

- Write it out! Create a list of all those who you can share your mission with. Think of the 4 F's and come up with a list.
- Create a way to "rank" those contacts by who needs to hear about your nonprofit
- Write out how they are connected to you and your team. This will help you build a strategy for talking with your prospective supporters

Finally we'll discover the key to...

Securing Major Gifts

Moving Prospects from
"Interested to Invested"



The Stages of Giving: **Active Portfolio**



Missional vs. Relational Giving Mindset





Relationship is the Key!

- Every stage of moves management requires you to be in relationship with your donors.
- You must be intentional to stay engaged with your donors.
 - Build a cadence of communication
 - Use tools to track interactions and capture notes
 - Be personable and authentic
- “Pay it back” mentality

Let's review some

Fundraising Tools



Sample Donor Table

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

Active Donor Portfolio Template

| Team Member | First name | Last Name | Phone | Organization or Company | Type | Current Stage | Previous Gift / Indicator | Expected Ask Amount | Ask Quarter | Last Action | Next Action |
|-------------|------------|-----------|----------|-------------------------|----------|---------------|---------------------------|---------------------|-------------|-------------------------------------|---------------------------------------|
| | Liam | Lewis | 456-7890 | Smithco | Business | Qualification | \$250 | \$750 | | Emailed info packet on 4/2/23 | Follow up via phone call on 6/1/23 |
| | Emma | Wilson | 653-7276 | WorkSpring | prospect | Cultivation | \$1,500 | \$4,500 | | Met for coffee, requested \$5000 | Send personalized thank-you note |
| | Noah | Parker | 867-5309 | Retired | MG Donor | Stewardship | \$1,000 | \$3,000 | | Sent donation acknowledgment letter | Schedule follow-up meeting on 5/15/23 |



Organizational needs:

- A financial goal and budget
- Accounting software
- A way to track donations and donors (CRM)
- Fulfillment and receipting processes
- Marketing tools (Email and Mailing Capabilities)
- Donation processing (online and manually)
- Commitment to the mission