



# Tips & Techniques

## How to Blend Annual, Major & Planned Gifts

Presented for: National Capital Giving Planning Council  
September 14, 2016

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## What's Up?

### Integration of Gifts

- Trends, Tradition & Turning to the Future
- 3 Concrete Ways to Promote Blended gifts
- Collaborative Recognition & Stewardship
- Wrap-Up

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## Current Giving Trends (AFP/Urban Institute 2016)

- **46%** average donor retention No change from 2014
- Every **100** donors gained in 2015, offset by **96** lost due to attrition


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## Current Giving Trends (AFP/Urban Institute 2016)


- Orgs. raising **\$500,000+** had a median **10.7%** rate of growth
- Orgs. raising **\$100,000 - \$500,000** had a median **.6%** rate of growth
- Orgs. raising under **\$100,000** had a median loss of **-11.8%**

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**Old School Approach**

Drives donor engagement & experience solely by gift size & financial capacity



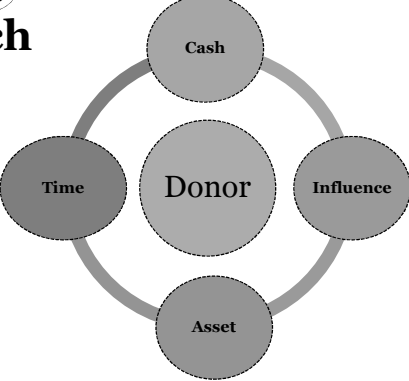
**Planned Gifts**  
**Major Gifts**  
**Annual Giving**  
**1<sup>st</sup> Time + 1 Off**

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**New School Approach**

Donor-Centered:  
Allows for engagement based upon demonstrated gift (beyond \$)  
\* Gift size still influences organizational investment



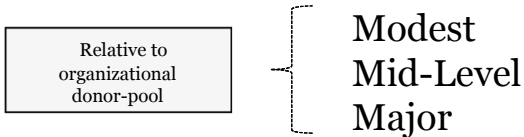
**Cash**  
**Time**  
**DONOR**  
**Influence**  
**Asset**

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## Tip One: Extend Engagement

Quantify: Set & Meet Annual Donor Retention Goal  
- Segment goal by gift size for 3 general types



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## Tip One: Extend Engagement

1. Create a base line for modest, mid-level & major gifts
2. Set sub-goals for each gift classification & define the collective goal
3. Link goals to defined measures of success for board or fundraising committee

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## Tip Two: Think Transformational

Quantify: Set & Meet Individual Fundraising Goals through inspiring donors to give above & beyond

- Set by gift size for 3 general types

Relative to current donors/partners



Modest (i.e. above \$500)

Mid-Level (i.e. above \$2,500)

Major (i.e. above \$5,000)

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## Tip Two: Think Transformational

1. Craft & share transformational success stories (lift from real donor/partner investments)
2. From your Strategic Plan create transformational calls to action for modest, mid-level & major giving (not yet funded/invested)
3. Partner with Communication & Programmatic teams

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### Tip Three: New, New & Newer

Quantify: Set & Meet New Donor Acquisition Goals

- Segment goal by either

Relative to  
organizational structure

Channel  
Segment  
Portfolio

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### Tip Three: New, New & Newer

1. Track & record where new donors come from
2. Review calendar & leverage face-to-face opportunities
3. Involve volunteers, board members & current donors/partners

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## Tip Four: New, New & Newer

Quantify: Set & Meet New Donor Acquisition Goals  
- Segment goal by either

Relative to  
organizational structure

Channel  
Segment  
Portfolio

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# Getting to YES!

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## Framing Your Call to Action

*“A need is an essential required to achieve an outcome versus an output”*

Output: Amount of something produced

Vs.

Outcome: A consequence, aftereffect or result

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## Undergird Requests

**Mission  
Statement**

**Values  
Statement**

**Vision  
Statement**

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## Inside the Mind: Planned Giving

Dr. Russell James, Texas Tech University

- Use visual autobiography (reconfigure messages, speak in 3<sup>rd</sup> person)
- Forget the term “bequests”; it reminds people of mortality—people will postpone these conversations; talk “retirement” or “planning”
- Adopt annual strategies to heighten awareness & ease fear; frame it as preparedness for the future

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## How to Adopt Annual Strategies

- January: New Year, New You!  
Target: 1<sup>st</sup> time & annual donors
- April: National Financial Literacy Month  
Target: Major donors (demonstrated capacity; regardless of age)
- October: National Estate Planning Awareness Week (Oct. 19<sup>th</sup>-25<sup>th</sup>)  
Target: Major donors over 60 years of age
- December: Giving Tuesday (Dec. 1<sup>st</sup>)  
Target: Collective

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## Recognition & Stewardship

- Meet with donors 1:1 to share the impact of the annual gift
- Celebrate donors who increase annual giving (privately & publicly)
- Maintain solid records in order to reference lifetime giving totals (incorporate within moves management plans)
- Emphasize the impact of a financial gift & not the mechanics of the gift
- Highlight how donor's have influenced others to give

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## Questions?

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Thanks for joining me; Happy Fundraising!

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