



Tips & Techniques

How to Blend Annual, Major & Planned Gifts

Presented for: National Capital Giving Planning Council
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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



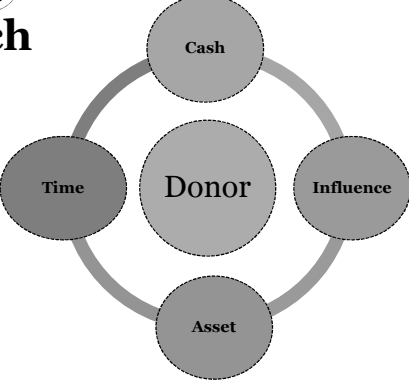
Planned Gifts
Major Gifts
Annual Giving
1st Time + 1 Off

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New School Approach

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



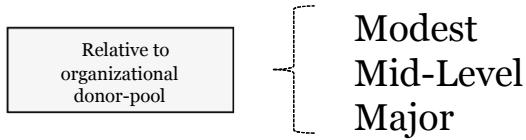
Cash
Time
DONOR
Influence
Asset

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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 3rd 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: 1st time & annual donors
- April: National Financial Literacy Month
Target: Major donors (demonstrated capacity; regardless of age)
- October: National Estate Planning Awareness Week (Oct. 19th-25th)
Target: Major donors over 60 years of age
- December: Giving Tuesday (Dec. 1st)
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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