



Taking a Step Back Will Lead You Forward

Association of Donor Relations Professionals
Carolyn M. Appleton
Webinar | March 29, 2018

Launching a Major Gift Campaign

- Lots of zeros can be intimidating
- Major gift campaigns succeed by identifying/cultivating the most capable prospects (often a small number)
- Most of your philanthropists may already be within your fold
- Do you need a consultant or consultant firm? Are there things you can do yourself to prepare?

Your Executive Director

- They are enthusiastic believers in what they are accomplishing!
- Do they understand the depth of preparation required
- Casual conversations with donors are not enough
- Consider meeting with constituents to take their “temperatures” about what is possible and to unearth barriers to success
- Include influential friends, peers and elected officials to learn how your organization is perceived.

Assumptions

- Making a major gift decision takes time and thought
- Put yourselves in the shoes of the donor
- What might donors want and need to know in order to make a significant commitment?
- Are your prospective donors absorbing the information in your current communications?
- Assume nothing!



Real Life Story #1

Visit with your donors and prospects privately.

Listen. Have they had a good experience with giving?

Address concerns by responding to questions in writing (to underscore the serious nature of your intent).



Real Life Story #2

Does your organization conduct “rolling” fundraising campaigns? Do donors know the last one ended?

Bringing prior campaigns to a conclusion is essential before moving forward with new ones.



Real Life Story #3

In printed and online communications, have you included solid content about your future plans? Are your documents easy to read in a business sense, without unnecessarily distracting graphic design and imagery?



An Honest Assessment

What has your organization done well? What could be improved? What is the budget for campaign expenditures (have you included contingency funding)? What is your ultimate goal?

Honesty and well thought out projects earn respect. Do not cover up problems - rather, address them head-on.

Review Donor Communications

We often assume we are communicating clearly with donors, that they know our plans and trust us. But this may be an incorrect assumption.

Major gift campaigns require their own documentation (not just pledge cards and snappy looking brochures). The information you provide should be comprehensive.

Talk to Them

“Feasibility studies” conducted by outside entities are supposed to provide an objective “read” on what you can expect to raise. Consider doing this yourself and taking those sensitive discussions in-house. Asking donors for advice - not money - shows you respect and trust them.

Keep a Cool Head

Don't be disappointed if you must take a few steps back and correct prior misunderstandings! If you do so - thoughtfully and methodically - you will indeed move forward.

Your Business Report

- It comes before you launch a campaign
- It should be professional but does not need to be graphically sophisticated
- Celebrate successes, admit problems
- How you will operate after you have attained your fundraising goal
- This will become the basis for your case for support, grant proposals, donor presentations and e-communications going forward.

It Takes Work

Consider hiring someone to work with staff on campaign prep and to manage your campaign. Or, give a seasoned fundraiser on staff a temporary replacement, so they can focus on the campaign.

Don't forget, you have the relationships - you want to deepen and strengthen them going forward.



Thank you!

- Carolyn M. Appleton
- Carolyn's Blog | carolynmappleton.com
- Email | carolynmappleton@gmail.com