

Major Donor Program Updates July 11, 2019



- Program Steps
- Prospect List Progress
- How Committee & BOD can get involved
- Metrics



Major Donor Program Steps



Find them

Develop Prospect List



Assign Relationship Managers

Major Giving Officer,
Prime, Secondary



Record it

Put assigned fundraiser
and prospect status in
Raiser's Edge database



Research & Intel

BOD, Committees, Staff
review the list and give
intel



Prospect Strategy Planning
Map the Relationship

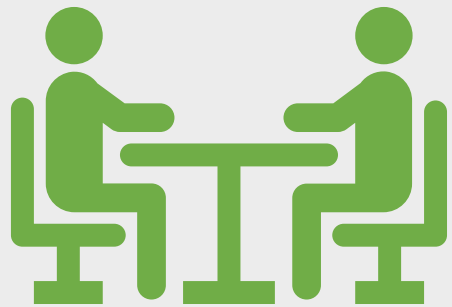
Where are we now?
Where can we go?
What can we do?

Prospect List Developed



- 150 individuals, family foundations, and corporations
 - Criteria:**
 1. Giving history: donors who've given
 - \$10K+ cum. in any given year in past 10 yrs and/or
 - \$50K gift to truck or capital campaigns
 2. High wealth ratings: individuals with
 - wealth ratings of \$1M+, and
 - lifetime giving of \$1,000+, and
 - recommended next ask amt of \$5K+, or estimated assets of \$10M-\$25M
- ** additional constituents added when there is a fit

Committee & BOD help



- What we will need your help with:
 - Provide intel on major gift prospects
 - Share your knowledge of donor capacity
 - Help meeting people we don't know
- When we expect to involve you:
 - **Late Summer/Early Fall** – review prospect list & set up 1:1 meetings to glean your knowledge
 - **Sept/Oct** – assist with Circle to Feed Hope annual appeal – writing notes, follow up calls, etc. (TBD)
 - **End of Year** – reach out to prospects with thanks, follow ups to solicitations, invite for tours/visits/etc. (per prospect plan)

Major Donor Program Metrics



Staff Activity

- # in-person meetings
- # in-person solicitations
- # donors disqualified or qualified
- # prospect research actions completed
- # of donors moved into a prospect management plan

Revenue

- Total \$ by donor segment
- Total \$ vs. Last Year
- \$ raised by donor upgrades
- # of donors upgraded
- % increase in retention and upgrade

Your Thoughts



IS THIS INFORMATION HELPFUL?



WHAT ELSE ARE YOU CURIOUS ABOUT?



WHAT OTHER INFORMATION SHOULD BE INCLUDED FOR THE NEXT BOARD MEETING?