Secrets of Maximum Major Donor Engagement

Pat McLaughlin, President & Founder

theTIMOTHYgroup
30 years of growing gift income
Winning Donors’ Hearts

1. God, The Donor, & You
2. Fundraising Facts
3. Fundraising Plan
4. Donor Engagement
5. Holy Boldness
God, the donor and you.
GOD, THE DONOR, & YOU

GOD REIGNS

• God blesses us abundantly. (2 Cor 9:8)
• God answers our prayers. Ask, seek, and knock. (Matthew 7: 7-12)
GOD, THE DONOR, & YOU
DONORS GIVE

Individuals 69%  
Foundations 17%  
Bequests 10%  
Businesses 5%

Source: Giving USA Foundation 2019
GOD, THE DONOR, & YOU

YOU ASK

• If you fail to plan, you are planning to fail. (Benjamin Franklin)

• Your job is to connect God’s people to God’s work through your institution and invite them to give.
The fundraising facts.
Bigger dollars add up faster.
You’ve got to fish in the right ponds.
Mega-major donors account for 90% of your campaign dollars.
HISTORY

• The first major donor campaign took place during the Exodus. (Exodus 25)

• The bible is rich with stories and scripture related to asking and fundraising.

• Seek encouragement from Elijah & the Widow, The Friend at Midnight, and Nehemiah.
Some fundraising planning basics.
FUNDRAISING PLANNING EVENTS

• Should you host a (virtual) mega-major donor event?
• What makes (virtual) events successful?
• Events vs. other donor engagements
FUNDRAISING PLANNING TIMETABLES

• How often do you reach out to mega-major donors?
• Do you utilize a planning calendar and solicitation timetable?
The 6R’s of donor engagement.
DONOR ENGAGEMENT
OVERVIEW

Identify

Cultivate

Solicit
DONOR ENGAGEMENT RESEARCH

• Who do you know?
• Utilize the Link – Interest – Ability method.
• Look for stewardship focus, heart for ministry, appreciation for the work you do, and relationship openness.
• Beware of stereotyping donor prospects.
DONOR ENGAGEMENT RESEARCH

- Segment your donor list.
- Identify your Top 50 – 100 donors.
- Utilize the Top 10 – Next 20 method.
- Screen donors with Wealth Engine.
## WEALTH ENGINE SCREEN

### Wealth Summary

- **Gift Capacity Range:** $5MM+
- **Gift Capacity Rating:** 20
- **Influence:** 1
- **Planned Giving:**
  - Bequest: Y
  - Annuity: 2
  - Trust: 2
- **Inclination Affiliation:** Older w/ Strong Political, Charitable
- **Inclination Giving:** Giving Data Not Provided
- **Board Member:** Yes
- **Income:** $100K-$250K
- **Pension:** Unable to rate
- **Real Estate**
  - **Total Value:** $2MM-$5MM
  - **Properties:** 10
- **Stock**
  - **Total Value:** $100MM+
  - **Direct Holdings:** $100MM+
- **Donations**
  - **Political:** $1MM+
  - **Charitable:** $20K - $50K

### EGC Breakdown

<table>
<thead>
<tr>
<th>Component</th>
<th>Actual Values</th>
<th>Calculated Values</th>
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<tbody>
<tr>
<td>Income Component</td>
<td>$224,999.50</td>
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<td>Real Estate Component</td>
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<td>Stock Component</td>
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<td>Pension Component</td>
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<tr>
<td>Giving Component</td>
<td>$1,934,600</td>
<td>$1,934,600</td>
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</tbody>
</table>

**Estimated Giving Capacity:** $91,844,168.75
DONOR ENGAGEMENT

RELATIONSHIP

• Cultivating donor relationships is key.
• The donor relationship is a marriage between your mission and their values.
• Know your donors (store contacts, birthdays, kids’ names, pets, interests, etc.)
DONOR ENGAGEMENT RELATIONSHIP

Major gifts require 3 components:

Head

Heart

Call To Action
DONOR ENGAGEMENT REQUEST

Who? The right prospect.
What? The right project. The right gift amount.
When? The right time.
Where? The right place. The kitchen table.
Why? The right person.
DONOR ENGAGEMENT REQUEST

F: FUNNY, I COULDN’T HAVE SWORN THERE WAS SOMEONE WITH THE STEWARDSHIP DRIVE HERE A MINUTE AGO.
“I do not like to have anyone tell me what it is my duty to give. But I do like a person to say to me, ‘We are trying to raise $4,000,000, and are hoping you may be desirous of giving _____ dollars.’”

~John D. Rockefeller
“Based upon your understanding and appreciation for our ministry, would you consider a gift of $1,000,000?”
DONOR ENGAGEMENT

RECOGNIZE

Thank you!
Donors are both customers and salespeople.
DONOR ENGAGEMENT
RECRUIT

“Let me get this straight. I’m a little old lady with money and you want me to ask other little old ladies for money?”

“Yes, I can do that.”
DONOR ENGAGEMENT REPORT

• How is the gift being used?
• What is the eternal impact?
• Share stories of how their gift is making a difference.
• Share answered prayer.
5 Holy Boldness
HOLY BOLDNESS
SCHEDULE APPOINTMENT

• Thank them.
• Update them.
• Share your excitement.
• Offer a glimpse of the vision.
• Cover them in prayer.
• Ask for a face-to-face (virtual) meeting.
HOLY BOLDNESS
THE ASK

• Share your gift proposal.
• Will you pray?
• Will you give?
• Will you friend-raise?
• Will you remember us in your estate?
HOLY BOLDNESS
FOLLOW-UP

• Answer questions.
• Share additional information.
• Check on their gift decision.
• Pray together.
HOLY BOLDNESS
STRENGTHEN RELATIONSHIPS

• Make personal contact (if permitted).
• Make phone or virtual contact.
• Email, text, or personal message.
• Follow, connect, and like/share posts on social media.
• Send handwritten notes & special occasion cards.
"Once we are prayerfully committed to placing our whole trust in God, and have become clear that we are concerned only for the Kingdom; once we have learned to love the rich for who they are rather than what they have; and once we believe that we have something of great value to give them, then we will have no trouble at all in asking someone for a large sum of money."

~Henry Nouwen~
QUESTIONS?

Please reach out anytime to chat.

Pat 616.437-5508

THANK YOU!