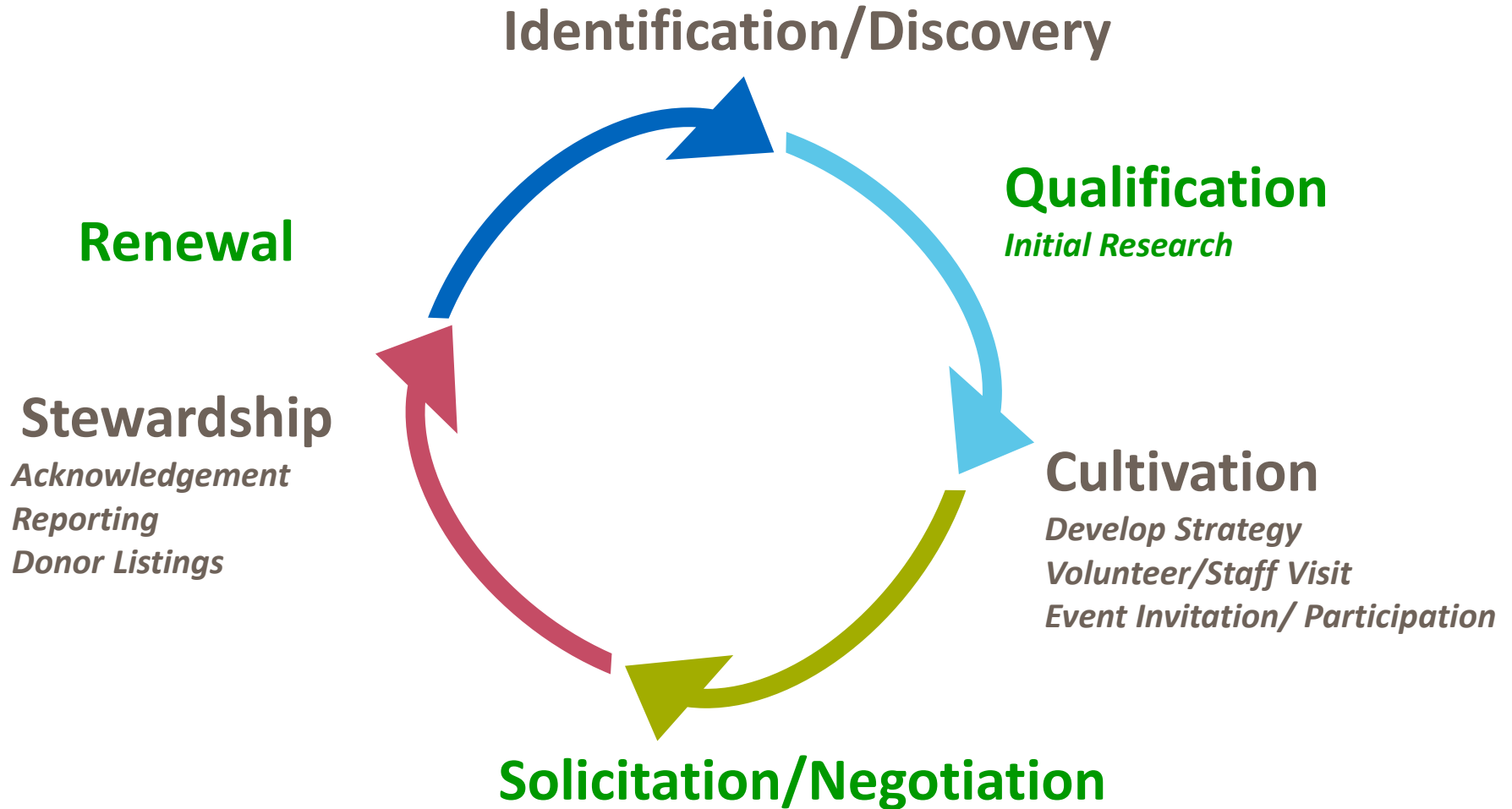

Maximising Major Gifts: The Art & Science

Working with your people: Discovery and Engagement

Ann Badger & Clare Pullar

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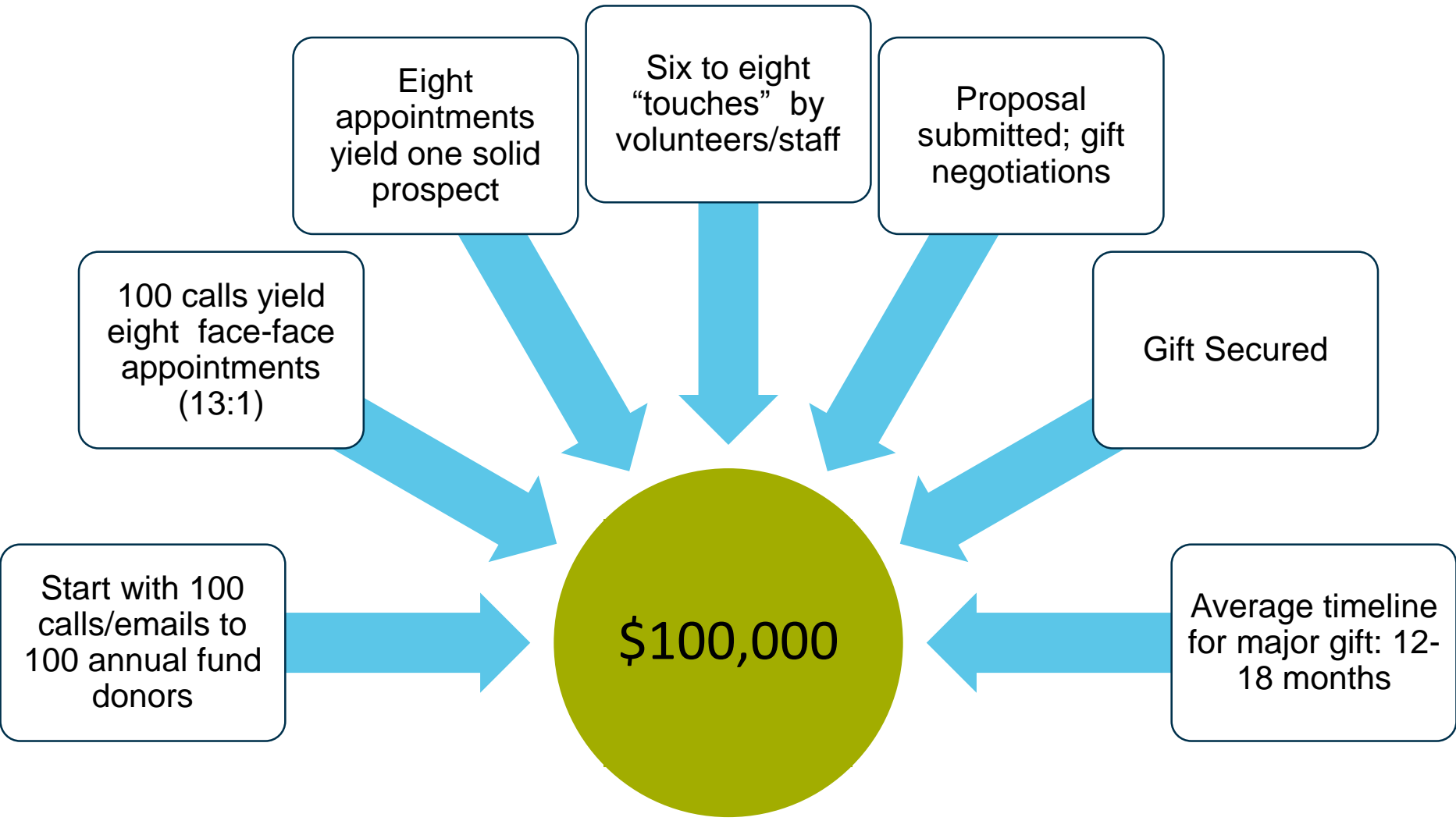
How Donors Engage



What Major Gift Donors Expect

- 1 A **personalised relationship** that fits their giving interests, priorities and needs, and is respectful and appreciative of their generosity.
- 2 The chance to make a difference and receive regular feedback about the **impact** of their gift.
- 3 The **chance to learn** about your organisation's work and overall organisational functioning.
- 4 The opportunity to get to **know and trust your organisation's Board and staff leadership.**
- 5 Thoughtful, **personalised stewardship** of the relationship

What it typically takes to secure a \$100K gift



Plan for Success... Prospect Management

- Each prospect requires a specific plan. One size fits one.
- Plan, record and monitor
- Adjust and evolve the plan: be flexible
- Think about moves and next steps
- Think investment and intent, not time or expense
- Consider who is the best person for each step
- Listening skills
- Consultation as cultivation (and, in time, funding)
- Compelling story telling
- Use inspirational people

Cultivation

- Build a meaningful relationship
- Communicate face-to-face at least **two or three** (can take many more) times
- Involve others as appropriate
- Determine interest (e.g. emerging artists, new productions, excellence, exhibitions, etc.) and passion
- Gather feedback
- Build involvement and ownership
- Look for capacity meeting passion

Qualification and engagement

- Prospect portfolios need to be managed carefully to ensure that qualification is an ongoing process. Churn is good

Monthly activity...

- Dedicate one-half day per week or one time period per day to calling prospects and get discovery meetings scheduled for 1-2 days per month.
- Month's activity: Week 1-calling. Week 4-visits off site.
- Build momentum and confidence by starting with the best attachment/affinity relationships and commit to the schedule.

Process of Qualification: Engagement Programs

Engagement opportunities for your prospects and suspects:

- Individual Discovery visits (how many per month – 10-12)
- Invitations to events - lectures, rehearsals, concerts, behind the scenes visits, etc. Make the program sustainable. Leverage what's already happening.

CEO's consultations for top individuals:

- HNW prospects
- Influencers
- Potential volunteer leaders



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