The Seven Keys
to a Successful Major Gift Program

An article from Veritus Group to help you succeed at major gift fundraising.

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What you will learn
1. What are the attributes of a successful major gift program
2. How to evaluate a major gift program's success
3. The key foundations for creating a great major gift program.
People often ask us what we think makes for a really good major gift program. Sometimes this question comes from their frustration with how things are currently going. Often it’s about wanting to make their program better.

In this document you will learn seven indispensable categories of work that we at Veritus believe are required for any major gift program to be successful in raising significant dollars for program, retaining donors and providing meaningful and fulfilling work for major gift officers. We add “retaining donors” and “providing meaningful work for MGOs” to the “raising money,” creating a list that we call the Major Gift Value Triad – because all three of these are important parts of having a successful major gift program:

1. Raising the money is important, as we all know.
2. But retaining donors is equally important. We see most major gift files losing from 40-60% of their value from year to year, with millions of dollars simply vanishing into air; so keeping donors is a critical value to the major gift effort.
3. And providing meaningful and fulfilling employment is also a critical value. If you are keeping the donors and raising the money but not valuing your MGO, there’s trouble ahead. The tenure of most MGOs lasts just over two years, so we can’t say we’ve learned much about stewarding this important human resource. And there’s a direct connection between losing your MGO and losing donors.

So with that said, let’s examine the first of these important Seven Keys.

**Key #1: Attributes of the Ideal Major Gift Organization**

It all starts with these three critical elements – an ability to raise money (a by-product of a non-profit that is doing good work and a donating public who supports it); a deeply held belief that donors are partners, not just sources of cash (with a strong desire to nurture and retain them); and a business environment and culture that honors its staff and provides them with meaningful and fulfilling work.

If you’re missing any of these points, don’t read any more. Just start working on getting this Major Gift Value Triad into your organization.

The next critical area that the ideal major gift organization has is a clear understanding of the difference between direct marketing, public relations, events and major gifts.

By “clear understanding” I mean that the leaders of the organization have organized work in a manner that recognizes that major gifts is not direct marketing, although at times it may use some DM strategies; is not public relations, although it will seek to preserve and promote the brand; is not events, although at times it will use an event (sparingly, please) to relate to caseload donors; but it is a one to one, very personal strategy where the sole objective is to match a donor’s interests and passions to the needs of the organization.

There are so many non-profits that do not have this right. Major gifts reports to the manager of direct marketing. Or public relations, events and major gifts are all lumped into one management structure. Or
the events manager leads the major gift agenda. Crazy things like that. Just crazy. Why do managers/leaders do this?

All that can be concluded is that it's ignorance – ignorance about what a major gift program is and how it works. Or there may be a bias towards some other marketing and communication program that keeps the major gift program "subordinate" to its agendas and objectives. Whatever it is, it's pure foolishness – a recipe for disaster and failure. Major gifts should be an entity by itself, reporting directly to the Director/VP for Development – even if it's a one person department. It should not have PR, Events, Volunteer Management – any of those things – mixed in. It should be solely dedicated to managing, nurturing, upgrading and relating to major donors. Period.

Who makes up the major gift team? Professionals who relate to individual major donors; others who relate to foundations; gifted team members who handle corporations and businesses; and talent that handles other institutions like other non-profits, churches, synagogues, parishes, social service clubs, etc. All of these "types" of major gift sources have one thing in common: they require a one-to-one, personal approach. That is why we include them in the major gift "house." Everything else belongs in another house – yes, a house on the same "development" street – but, assuredly, a different house.

Many times when we present this concept to management and leadership, a great deal of angst, debate and downright arguments ensue. It's almost as though we've been promoting fundraising heresy and should be banned from the discipline. It's only when we can show how millions of dollars are lost each year and hundreds, sometimes thousands, of donors are going away each year that our voice can be heard as one of reason and practicality. Our relationship to donors is a sacred trust. It is a mysterious and mystical thing. It is something to be valued and treasured. Believe this, and then take steps to align your organization so that it can properly and effectively house the ideal major gift program.

**Key #2: Make Sure You Have the Facts!**

I always like to start any endeavor or any plan with fact gathering. What is true? What is real? Those are important questions before you jump into action. In major gifts, we get so focused on getting the money and reaching management goals that we hardly stop to figure out who we should be relating to. "Fire! Ready? Aim!"

I know the pressure to reach your management goals is bearing down on you. Even if it isn't, you have that internal pressure to achieve, to prove you have value, and, to do good work. But hang on! Stop! Analyze first. What is true? What is real?

At Veritus, we spend a great deal of time talking about analysis and how important it is as the major driver in caseload donor selection and performance. Why is this so important? Because not just any donor on the caseload will do. If you're going to have, as we suggest, 150 qualified donors on your caseload, you'll need to start with at least three times that number from your donor file to qualify a caseload pool down to the 150. And, of all the donors on your file, you will need to know which ones to select. So how do you get to what is true and real? How do you get to the facts? Here is what we think you will need to do:
1. Look at your donor file and find those donors who are consistently giving $1,000+ cumulatively over recent calendar years (donors think calendar, not fiscal) – at least the current year plus three past years.

2. Pair that information to any wealth/asset information you have, to determine capacity.

3. Organize this information by types of donors (individual donors, foundations, corporations/businesses, other organizations).

4. Select recent high givers (actual giving) that have high capacity.

5. Keep an eye on recently-lapsed high givers that have high capacity.

6. Put all those donors that have the highest recent giving, plus high capacity, onto your caseload pool list.

7. Put this list through a qualifying process to arrive at your qualified pool.

This is how you get to the facts about WHO to put on a caseload pool which will then be put through a qualification process. Then, we suggest, once you have a qualified caseload, you do this same analysis with the caseload every month to keep an eye on how the donors are performing and what remedial steps you should take in managing the caseload.

Notice that this whole process is about continually crunching the data. Why? To uncover what is happening with donors and then use THAT as your guide to action and planning. To be sure, all of this analysis is complex, and it takes time. But it is an important key for success in major gift fundraising. There’s the old axiom, “facts are friendly.” And they are. But sometimes they are really hard to come by. If you pursue them with discipline and energy, you will find that they truly are the friends people say they are.

**Key #3: Do You Have the Right Moves?**

Have you heard of the very capable MGO whose every donor on his caseload has the same interests and passions? So you hear him say that there’s no need to be digging around for more information, no need to create a unique moves management plan for each donor, because “all they want to do is help.” Well, of course, all they want to do is help! Isn’t that what giving is all about?

But this person, who is so good in so many ways, is so lost on this point. And so are many other MGOs in too many non-profits here in North America and Europe. That’s why this Key is about having all the right “moves.” Because having the right strategy springs from a clear understanding of the donor’s interests and passions. If you will secure that information, then you can be about DOING the right things with the donor.

Once your caseload is set, a contact plan should be created for every donor – a plan that is specific to them, their interests, and their giving patterns. Our philosophy is that a major donor is only asked once or twice during a year, and that the ask is buttressed throughout the year by a stream of what we call “touch points.” These touch points, a minimum of one per month (sometimes more), include tactics such as:
• A report from the “front line” which matches their interests and assures the donors that their gift has made a difference.
• An internal memo that addresses some problem or situation in the program area that the donor would be interested in. This gives the donor an insider’s view.
• An appropriate gift.
• Invitations to special briefings.
• A newspaper or news magazine clipping that either describes a problem that you are dealing with and/or talks about the organization.
• A copy of an actual letter from a person helped by your organization.
• Invitations to visit program sites.
• Personal visits.
• Telephone calls or postcards.
• A report from the Chronicle of Philanthropy that says giving is down, etc.
• A video or audio clip that either shows a problem or shows a solution.
• A birthday or anniversary card.
• A book that deals with compassion or caring.
• A note from various leaders in the organization.
• A picture of a person that has been helped in their area of interest along with a post-it note from the MGO that says something to the effect of: “Here's a picture of Joe – a person your giving has helped in the X area” along with a brief project report.
• An e-mail that gives a success story or sets up a problem.
• A note on the donor’s Facebook wall (once they have accepted you as a friend) that reports on what their giving is doing.

...and scores of other “touches” that show the donors that you are present with them in this relationship, that you care, that you notice when they give, that you are open to their questions and concerns, and that this relationship is about partnership, NOT an economic exchange. All of these predetermined moves should strategically serve three objectives:

1. To tell the donor how his or her giving is making a difference.
2. To give the donor an insider’s view of what you are doing.
3. To set-up the ask.

In fact, we suggest that you make a list of all your planned moves for each donor and place each move into one of the three categories above to see if you have enough moves for each one. And ask yourself the following questions:

1. Am I telling the donor often enough that his giving is making a difference? How often is too often? OK, if you told him every day, that might get to be a little much. But two or three times a month in simple, low-cost ways might be just right. It doesn’t need to be a fancy typewritten letter – it can be a handwritten note. It can be a post card – or an e-mail, which costs nothing but your time.
2. Am I giving the donor an insider’s view of what we are doing? Am I letting her know how the project or program is going, good and bad news, how a technical approach to the problem is working, or not working? Insider stuff. Not just high-level blather, but real down in the trenches stuff.

3. Am I properly setting up the ask? This is about knowing where you are going, as it relates to the ask. Have you been talking about a problem the donor is interested in solving or addressing? Have you been doing it for months, sharing info on why the problem or situation needs to be dealt with, providing technical info on the causes and possible solutions, and sharing third party opinion on what they think and how to deal with it? Setting up the ask is not just a one time event – it is a sequential and logical process that spans many months and builds.

Having the right moves is so critical to success in major gifts, as it is in all relationships. You just can’t be thoughtless in your relationships with your boss, partner, spouse, subordinates, friends, etc. and expect them to be meaningful. We know this! But too often, we just put our hands out and go for the money.

When you stop and think about it, that’s pretty offensive. As we all know, donors are partners, not sources of cash. So they deserve a thoughtful and caring approach from you – a strategy that springs from their interests and passions – one that is tailor-made for them and honors the unique and wonderful people they are.

**Key #4: Develop Offers that Donors Want**

"Donors are approaching philanthropy in a completely different way. They are making decisions more thoughtfully. Their gifts are following their own intended purposes. Donors are seeking a return on their philanthropic investments. And they desire an increased level of personalization. Organizations embracing this change are climbing a mountain of success with zenith, while others, forcing their own models onto their donors, are fighting in the foothills." *(Fundraising Analytics* by Joshua M. Birkholz)

It is a fact that donors are changing. They are expecting more in their relationships with their favorite charities. Gone are the days when a donor just blindly gives without requiring accountability and information related to that giving. That is why forward-thinking nonprofits are spending more time figuring out how to develop offers that donors want.

Now if you don’t think you need any offers to present to the major donors on your caseload, then stop reading – you are all set. But if you are like most MGOs, this area is a serious problem. You have a very good program. You have a group of great major donors who are eager to help. And you have nothing to talk to them about. OR, if you do, it is packaged in such a weak way that it will be difficult for you to present it. If this describes what is going on with you, then stay with me while we go through how to solve it.

First, let’s start at the beginning. A non-profit exists to serve humankind through a variety of programs. There are direct program costs associated with these efforts. And there are overhead costs – nasty overhead costs – at least that’s how many of us think about them.
The sum of all these costs equals a budget. For sake of illustration, let's say this budget is $1 million. This budget is funded through a variety of means: some government grants, some foundation grants, some corporation gifts, some individual current gifts and planned gifts, etc. For sake of illustration, let's say there are 10 donor source categories who give $1 million to fund the budget. This budget is drawn up for organizational purposes with organizational categories and labels. The broad categories are program and administration.

Again, for sake of illustration, let's say $1 million is spent on the sum of these categories and for the program part there are 10 major program categories where we spend $700,000. What we have, as a result of this exercise, is $1 million coming in from 10 major sources to fund a $1 million budget of which $700,000 is spent on program and the remaining $300,000 is spent on overhead. There are seven problems that currently exist within most non-profits as it relates to budgeting:

1. The budget is drawn up for organizational purposes, not for donors. In this sense, the budget is not donor-driven. Even though the majority of the funds come from donors, it is very difficult for a donor to see how the $1 million divides down into the 10 program categories.
2. The program part of the budget is understated, and therefore the fundraisers in the organization will be focused not on raising $1 million, but $700,000. This will cause financial problems. While this dynamic does NOT occur at a conscious level, because the budget is organized this way, the net result is that the fundraiser actually uses the program target of $700,000 as the amount to raise, rather than the whole amount. This just happens as a natural outcome or result of the structure that has been set up.
3. While it is important to understand the difference between overhead and direct program costs, the danger is that overhead, over time, will be seen as a necessary evil and not as an integral part of program.
4. It is almost impossible for fundraisers to represent what the organization does and quantify it, because they cannot get to the numbers. The result of this dynamic is that donors are not given the right information that will make them satisfied donors. And dissatisfied donors go away, which is why, in our work on the major gift programs around the country, we have uncovered a very large and disheartening attrition of good donors in most major gift files.
5. It is difficult for fundraisers to raise funds because the budget cannot be presented in ways that the donor relates to and supports, i.e., in terms of what is being done for people.
6. Because of this situation, fundraisers and donors will tend to want to fund programs that are outside the budget, causing even more problems internally.
7. All of this creates a financial situation that younger, more inquisitive and business-minded donors will find troubling and sloppy, and the organization runs the risk of losing support from this very important and growing public.

While these seven points seem ominous and may, on the surface, be overly dramatic, the truth is that as the charity donor population becomes younger and more sophisticated, unless these situations are addressed, many non-profits will face difficult financial times. Why? Because donors will want to see things their way, and they will demand more accountability for how their money was spent. Gone will be
the days when a donor just gives because “I trust them.” There may be trust, but they will want to verify how things operate and, more importantly, they will be thinking about what your organization does in terms of its end result, not just in accounting terms. This is why at Veritus we have created a process and protocol called the Program Support Portfolio (PSP). We have chosen these words because of the special meaning assigned to each word:

- **Program**: This is strictly about program – CURRENT program the organization does for people in an integrated manner. And this view goes down to the smallest operating unit, so that donors can grasp and support what is happening at the smallest organizational level. We have highlighted the word *current* here to emphasize that the PSP program is about existing budgeted programs, not new programs. The purpose of the PSP program is to help fundraising and communication personnel secure funds for budgeted programs.

- **Support**: This is also about how a current program is supported. And it means that ALL the costs are included, both direct and overhead. It also means that donors support the totality of the program, not just one part of it. In the example earlier, it means that $1 million is covered, not just $700,000.

- **Portfolio**: There is a broad selection of things a donor can support in the current program. It could be children, youth, young adults, couples, seniors. Or the donor could look at it as drug rehab, single parent care, child care, job training, spiritual work, housing, feeding, etc. – any number of ways to help. The donor could also look at it as all of the above PLUS a specific PLACE that he or she is interested in. It also means that there are different ”price points” to any and all categories of help. So, if the donor wants a $1,000 project, she can find it. Or if it is $10,000 or $3 million, she can also find it.

We want to have a “portfolio” of current program opportunities a donor can fund. Portfolio is defined as, “A group of possible investments a donor can have in an area they are interested in.” To be clear, each program for support in the portfolio contains four critical elements:

1. Program category
2. People group helped
3. Location
4. Price point

We must be able to offer the donor a current program to support that meets criteria in EACH of the four areas above. Why? Because that is the way donors think. If one is able to get a donor to say what his interest is, he would, more often than not, say, ”I want to support the education (Program Category) program for children (People Group) in Newark (Location). And I am willing to participate with you at this time at the $50,000 (Price Point) level.” This is why we need to have all of these points of information decided/determined in advance, so we can present our total budget ($1 million) in all the ways that logically fall into the four critical elements mentioned above. This will result in a truly donor-driven budget that will result in gaining full support for what the organization wants to do in a specific area.

Now there is a lot of detail on how to execute this with your finance and program people. But it can be done. And the result will be that you will have a file full of project possibilities to present to your donors –
projects that will match who they are and what they are interested in. That will keep your donors happy. And we all know that happy donors will stay with you.

**Key #5: Turning Planned Giving into Strategic Giving**

With trillions of dollars transferring from one generation to another in the next few decades, planned giving is an important part of the ideal major gift organization. If you don’t have planned giving as a central part of your major gift organization, you must put one in place, not only to help your good donors in the critical planning they must do in this area, but also to secure additional funding.

We at Veritus are fortunate to have a colleague, Anne Nash, who specializes in Strategic Gift Design and Asset Based Fundraising. While a lot of good can be said about traditional planned giving strategies, the progressive non-profit is adding strategic giving advice to their portfolio of offers to donors. Anne’s concept is about helping affluent major donors structure their wealth now for partial distribution while they are living, so that it can benefit them economically and bring a lot of joy and fulfillment as well.

It’s sort of like turbo-charging the donor’s annual and legacy giving. In this concept, you not only engage with the donor and his or her attorney, but often with the donor’s family, business associates and advisors – in fact, anyone who is or could be part of the donor’s economic landscape. This approach takes you far beyond the traditional asking and giving models and, using tax and financial planning tools, helps the donor think creatively about how to use the assets they have and control as a critical part of their giving.

Another thing Anne is obsessed with is the intersection of major gifts and planned giving. Let’s face it, these two “camps” are often managed separately, compete with each other for “credit” and generally do not talk to each other. It’s like your family doctor, the general practitioner, not ever talking to or relating to the specialist! Crazy. We’re talking about ONE donor here – one donor who has cash and assets, and who is currently living but eventually will pass. It’s one thing, not two. But we often don’t manage it that way. That’s why Anne feels so strongly about how these two come together, and why the passage between them must be navigated carefully – since it is populated with your very best donors who must be treated with great care and have the professional attention and interaction they are accustomed to. So the first critical points in turning planned giving into strategic giving are:

1. Make sure the functions of planned giving and major giving are totally integrated. Eliminate the usual competition in these areas. Treat the donor as one person, not two halves.
2. Enhance your planned giving program with the Strategic Gift Design and Asset Based Fundraising approach.

There is one more reason to beef up your planned giving efforts beyond the two points above. Your good service in this area will also protect some of your most valuable donors from abuse. Let me explain.

Lisa Gibbs, writing in the August 2011 issue of *Money Magazine*, tells us that seniors lost nearly $3 billion in 2010 to financial predators. She goes on to tell the story of how a local insurance agent “persuaded Art Tener, 79, a retired auto dealer service scheduler, to roll $113,000 in savings he had in annuities into new deferred annuities that handcuffed the money for up to 16 years despite a terminal illness that doctors
said meant Art had less than two years to live.” Art's son Jim, 52, said: “Instead of enjoying what turned out to be the last nine months of his life, he didn't have $100 to spare.”

The article goes on to say, “One out of every five older Americans has been sold an inappropriate investment, paid excessive fees for a financial product or service, or been a victim of fraud, according to a 2010 study by the Investor Protection Trust.” Let me bring this home to you in a very personal way. If your parents are still with us, and elderly, ask yourself this list of questions (from Money Magazine) which are designed to determine if they are at risk of being defrauded out of their hard earned money:

1. Do they own high risk investments such as penny stocks?
2. Do they vet the financial pros they hire (say, checking their credentials or disciplinary records)?
3. Have they attended a “free lunch” seminar?
4. Have they called 800 numbers in response to ads offering free information?
5. Have they signed up for a Do Not Call list?
6. Do they read their junk mail?
7. Do they have a formal financial plan in place?
8. On financial decisions, do they listen to the latest tip rather than seek professional advice?
9. Have they recently experienced a financial setback, serious illness, death in the family or another life stress?
10. Do they live far from other family members and not have a wide circle of local friends?

Here's the reason I am including the topic of abuse in this post. Don't think for one moment that every major donor on your file has available to them the services of advisors that will help them not only plan but also avoid getting taken advantage. Many do. But many do not. And, if you accept Anne's premise that major gifts, when holistically applied to your good donors, includes ALL the advice related to the wealth of an individual, then you have to include in your services to donors everything that looks at current cash and assets, future disposition of cash and assets, plans that are in place or need to be put in place AND protections against fraud.

Does all of this sound like your donor has a very good friend watching out for every aspect of their finances? Yes! That's the point – a partner who walks with them – and someone who thinks holistically about it all. Now, to be clear, an MGO or PGO should never take the place of a legal or professional advisor. The role I am suggesting here is that you are a good friend who, in essence, is “another set of eyes” to make sure things are in order and done right. Along with Anne Nash, our good friend and colleague, Doug McDaniel, a planned giving guru with The Salvation Army, has helped us understand the important role of planned giving in the organization. His input has helped frame some of the questions you should ask yourself when evaluating your program:

1. Are you operating with the right philosophy? By this we mean a holistic approach that truly cares for and serves the individual, even if it means helping them give to organizations other than yours. Included in this is a service that is watching out for your good donors and making sure they are not victims of fraud.
2. Do you have the right program design? Besides all the traditional planned giving methods and approaches, do you have in place a form of Anne’s Strategic Gift Design and Asset Based Fundraising approach? And is the program totally integrated with the major gifts program? It must be!

3. Is your communications/marketing plan strategic? Do you have a case for support for planned giving and regular consistent messaging? Do you have a lead generation and follow-up strategy that actually works and is effective? Most plans we see in this area are not effective and do not work. It’s no wonder that planned giving revenue is practically non-existent!

4. Do you have a wide array of gift options? There are so many of them – you need to be able to offer alternatives to your donor.

5. Do you have the right staff? Selecting the right staff or assigning the planned giving functions among staff is critical. Even experienced staff need ongoing training, and entry level staff will need more.

6. Are you managing properly? The program must be managed to assure best practices, to assure integration of effort, to eliminate competition between MGOs and PGOs, and to make sure every area of planned giving is executed properly.

7. Do you have competent and up-to-date technical support? Some level of legal and tax knowledge in a narrow area is helpful within the staff ranks. But what is critical is knowledge of boundaries and access to qualified expertise when required for particular cases.

I can’t emphasize enough how important it is to make sure you are following up in this area, both for the revenue it can bring to your good cause, and also for the great and needed service you can provide to your good donor.

Key #6: Treating Corporations and Foundations Just Like Individuals

“Corporations, businesses and foundations are an entirely different animal,” the Development Director said with solid conviction and no room for discussion. There was no way we were going to convince him of a different point of view. We tried to make the point that corporations, businesses, foundations and other organizations (places of worship, other NGOs, service organizations, etc.) were really no different than an individual major donor, but he would not hear it.

So here is the case for our point of view: why the ideal major gift team must make a concerted effort to treat these important segments of the upper end of your active donor file, namely corporations and foundations, just like individuals.

Many major gift people look at organizations (my catch-all word for corporations, businesses, foundations and other orgs) as these mysterious, impenetrable, impersonal structures that are very difficult to talk to and deal with. We at Veritus have always looked at them as people, pure and simple. Just people. Think about it. An organization is nothing more than a group of individuals. It has a personality, a set of values and a way of doing things – just like a person. We tend to focus on the grantmaking rules of an organization, rather than on the fact that behind those rules and processes are a group of individuals who actually have blood running through their veins, feelings in their hearts and thoughts and values in their heads, just like every one of the major donor individuals on your caseload. Let’s look at this more closely:
• A corporation has a set of values, other than just profit, that drive its need to give some of its money away. There is a growing trend among progressive businesses to be more socially responsible. Leaders are realizing that there is a connection between their charitable interests and activities and their reputation and profit. Bottom-line: a set of values drives charitable giving – just like an individual!

• A foundation was founded by either an individual or a business to fund a set of interests and passions – just like an individual.

• An organization, whether it’s a place of worship, a social club, another non-profit, etc., was organized to pursue a set of interests and values – just like an individual.

• A set of organizations should be on a caseload and managed by an MGO using the same metrics, moves management approaches, performance reporting, etc. as the MGO managing a caseload of individuals.

As we’ve said all along, an effective major gift program starts with the MGO identifying, then serving the interests and passions of an individual. It is no different with an organization! The ONLY thing that is different is the process of securing the funds. Everything else is the same – including reporting requirements. On this point of reporting requirements, it is so interesting that non-profit fundraisers will agree they need to report back to organizational funders with discipline, accuracy and timeliness – but those same people will not set up reporting-back systems for individual donors. And then they wonder why thousands of donors go away and millions of dollars are lost each year!

So the key thing with an organization is to find out what those interests and passions are, and then figure out how to serve them. (Note that there may be a different set of interests and passions for different divisions, departments or offices of the organization.)

Here are the steps you can take to develop or improve this area of your major gift program:

1. Make sure that organizational fundraisers are part of the major gift team. They should not be isolated from the individual MGOs or managed by a different department. They should be an integral part of the major gift team.

2. Get rid of the notion that you have to get stuffy and intellectual in how you talk to organization representatives. It is true that they will require more process, proof of outcomes, budgets, stats and other numbers and facts. But don’t get away from the core fact that you, through your organization, are changing lives and/or the environment, and that that is the most important thing the two of you can be doing together. This also means that your communication, in addition to the business and process content requirement, should have emotional content as well. You need to find that common ground of shared values, passions and interests, and then talk about those shared interests and values using stories to make your point.

3. Find and connect to the decision-maker in the organization. This may require matching up your CEO or program head with that person.

4. Discover the match between your program objectives and the organization’s interests and values. You really can’t move forward without this critical information. The key question to answer is this: What objective is the organization trying to achieve through their charitable giving?
5. Prepare a proposal that shows how their interests and values match your program objectives, and be sure to meet the proposal, documentation and due diligence requirements they have.

6. Be sure to include how lives or the environment will be changed as a result of their giving, and how their objectives will be met.

While fundraising from organizations can be complex, the process really boils down to these simple points. Follow them, together with the requirements of the funding organization, and you will be successful IF you can successfully show the match of values and the achievement of their objectives. Remember, there are plenty of funds to be had from this important source. One of our clients raises over $10 million a year through the efforts of two MGOs dealing with a relatively short list of organizations! These folks have figured out the code we've outlined here.

You can secure funds from organizations. Make a commitment to manage and relate to all the organizations on your file the same way you have organized yourself to deal with your individual major donors. And don’t forget that an organization has a heart and face. Look for it!

**Key #7: What You Get Done Matters!**

We were shocked when the MGO closed the door and told us about how her manager related to her. "No one ever asked me for a goal for the year," she said. "In fact, I didn't even have a work plan. My job description was vague and general. And – listen to this – my manager hardly ever checked in to see how things were going."

That conversation happened quite a few years ago. As time has gone on, we have become less shocked – actually numbed – to the reality that management and accountability don’t seem to matter much in the fundraising world. That is why this last and final key of the ideal major gift organization has to be the subject of management and accountability.

Believe it or not, management of a process and people is as important as getting the money for program. However, you would never know it by looking at the inner workings of many non-profits today. There is so little value placed on setting goals, measuring progress against those goals and holding people accountable to do good and effective work. The whole issue can be extremely frustrating!

We sit with good folks who are trying to help people or the environment through really good programs and all we can see is money being lost, labor being wasted, laziness being rewarded, and a lot of mindless activity being tolerated. So the organization spirals down. It is so sad. That is why this subject is so important. At times, when the subject of management and accountability is brought up, we can see the defensiveness increase, the back stiffen and that preparation for conflict begin. All this as if we were trying to actually ruin someone’s life by suggesting that what they accomplish actually matters; that we have a responsibility to our donors to use their money wisely, and, that it is important to know we are effective.

Let’s stop and think about this for a second. We are all certainly in touch with that part of ourselves that is unmotivated and lazy – the part that wants to play – the part that is just plain sick of working – the part
that just can’t do some of this job as well as someone else can – the part that is tired, gets discouraged and doesn’t know how to go on. We are all in touch with that part. We are also in touch with the fact that how we feel about ourselves is directly related to a confluence of two things: WHO we are (being) and WHAT we get done (doing). If we have the being part right, but the doing is out of whack, we can’t truly love and respect ourselves, which means we’re not happy and we won’t do very well in a lot of areas of our lives.

You know what this is like. You have the nagging feeling that there is a gap between what is expected of you and what you are actually delivering. That gap – that nasty little gap – is what will tear you down.

That is also why it is important for a kind and friendly management process (and person) to come alongside and get rid of the gap, so that you are performing to expectations. We at Veritus have never viewed management and accountability as a punitive and negative thing, although many managers use it that way – to their shame and discredit! Management and accountability systems and processes should be a kind, honest, direct way of helping a person meet expectations – their own expectations, and the expectations of the group.

When management and accountability are done right, it is HELPFUL, not HURTFUL – and that is a beautiful thing! And it is needed. Why? So that every person on the team does his or her part to meet expectations – so that the team will succeed, and the individual person will succeed. Management and accountability, done right, is an important key of the ideal major gift organization because, without it, leaders will not lead as they should, MGOs will not perform as they should, and the funds for program will not be raised as they should.

Our philosophy and approach to management and accountability is quite simple and is covered in the following three points: First, there has to be an economic destination for the team and each MGO. Call it a goal. Second, help needs to be given to individual MGOs so they:

- ...focus on caseload rather than prospecting (none allowed) – love the donor you have, not the one you might possibly acquire.
- ...focus on retention of donors first, then upgrading.
- ...relate to donors on caseload as individuals, rather than as clusters or a group.
- ...keep learning how to deal with objections and problems.
- ...keep learning how to structure asks and proposals.
- ...value, understand and report on their performance in a positive manner, not a punitive one.

And, third, make sure management reporting happens in five areas:

1. How the same donors last year are performing this year.
2. How the donors are performing against individual goals.
3. How many visits, contacts and asks the MGO is making.
4. Report on unusual gains and losses for any donor on the caseload to make sure other numbers are not being skewed.
5. How the MGO is performing.
Just do this, kindly and positively, and you will have happy and productive MGOs. And we all know that happy and productive MGOs equals happy donors. Happy donors means that programs are funded, which is what we all set out to do in the first place!

In this document on **The 7 Keys to a Successful Major Gift Program** we have tried to show that the entire effort is not just about revenue streams and strategy. It is also about how we think, analyze and manage. Put together, the 7 Keys are a powerful combination of “what and how” that, when implemented, will give you the success you are searching for.

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*Veritus Group is a full-service mid and major gift consulting agency serving non-profits all over the world. We help create, build and manage major gift and mid-level giving programs by combining donor-centered strategy with solid management that is focused on accountability.*

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