

Stairway to Heaven

Working the Higher Ed Gift Pyramid

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March 23, 2016

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James Plourde, CFRE
Senior Consultant

- 25+ years in the field; 11 in Higher Ed
- Clients in all sectors, strong focus on education and youth
- Major gifts, board development, campaign strategy



Carrie Dahlquist
Director, Strategic Information Services

- 17+ years in the field; 7 in Higher Ed
- Clients in all regions and sectors
- Strategic planning, analytics, relationship management

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Our agenda...

A strategy for segmenting your donors
Lead - Major - Community

Using data to identify prospects

Qualifying prospects

Mobilizing staff/volunteers

Poll:
Where are
you in your
campaign
cycle?



If you remember one thing...



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Traditional view of campaigns

Based solely on university needs

Little effort to learn donor needs

Overly focused on dollar goal

Elaborate volunteer structure

Cultivation “on the fly”

Multi-initiative

Little to no foresight to next campaign

Alternate view of campaigns

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Potential pitfalls

- Poor sense of donor interests
- Narrative = 'bunch of projects'
- Lack of due diligence
- Lack of volunteer *leadership*
- Too *few donor prospects*
- *Staff* not motivated

CAUTION!

Poll:
Which of
these rings
truest?



Campl

The role of data in fundraising

A magnifying glass with a grey handle and frame is positioned over a puzzle piece. The puzzle piece is dark grey and stands out against a background of lighter grey puzzle pieces. The magnifying glass is angled from the bottom right towards the center, highlighting the puzzle piece it covers.

The data
landscape
today

How things
have changed

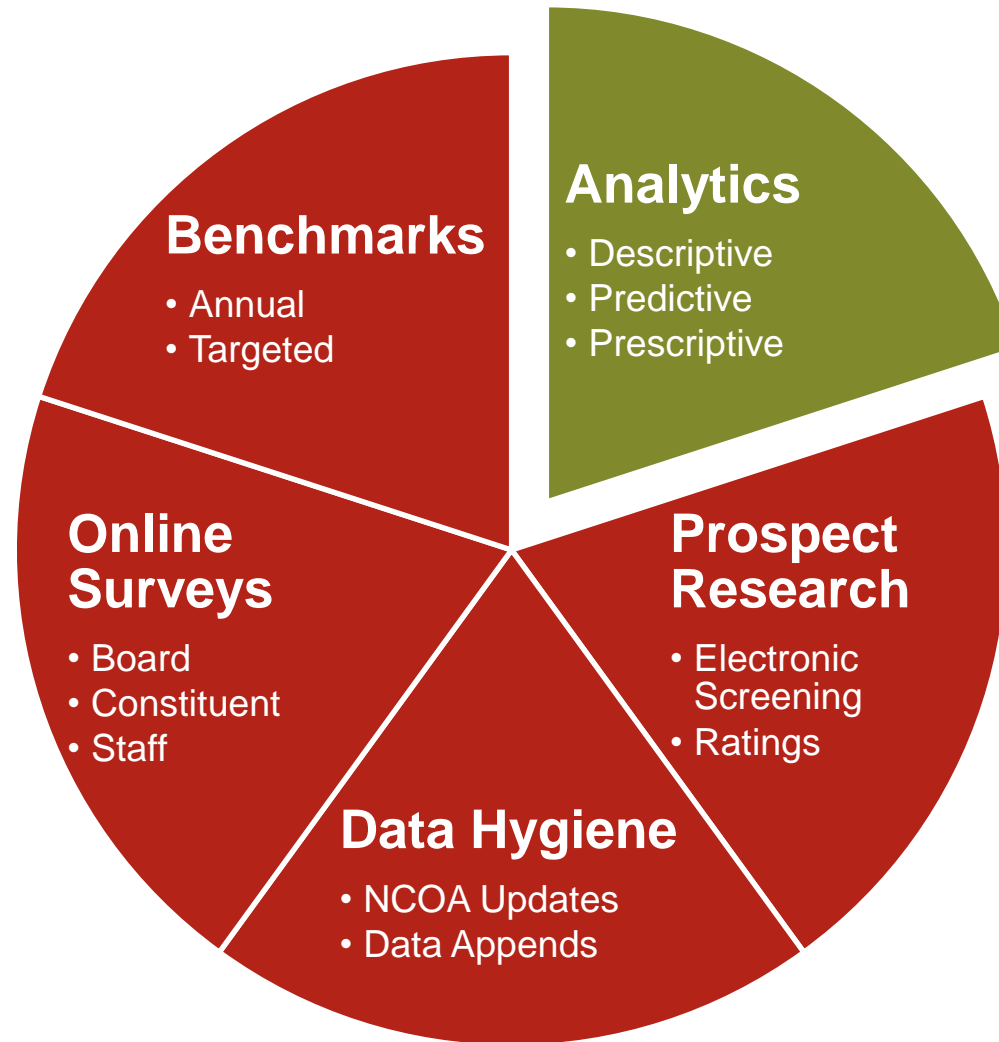
Role in major
campaign

How to plan

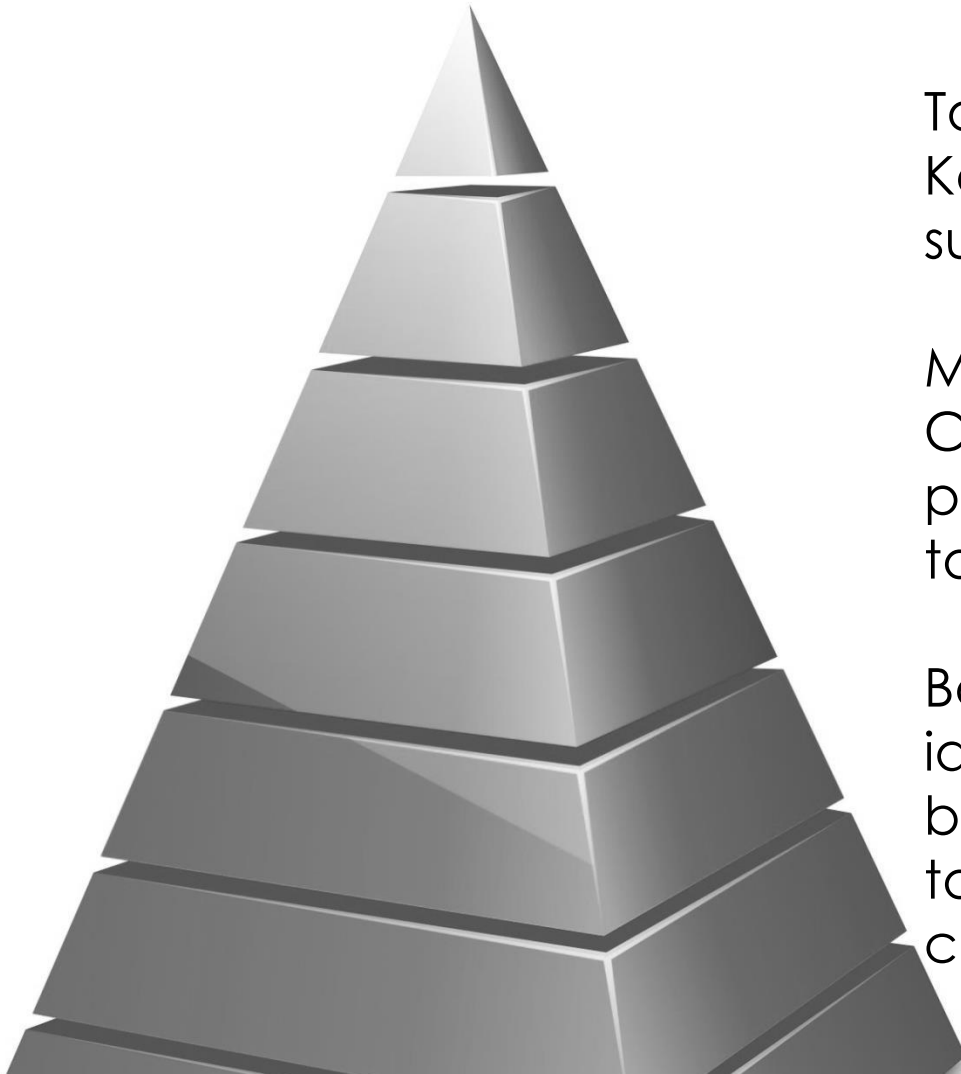
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So many different kinds of data



Data supporting fundraising



Top of the pyramid:
Key Stakeholder knowledge,
supported by prospect research

Middle of the pyramid:
Capacity + Affinity uncovers
prospects (and future prospects)
to qualify and manage

Bottom of the pyramid: Affinity
identifies others to
be cultivated, as a group,
to see who self-identifies (surveys
can also be very useful here)

Using data to identify your gaps



Gift Level	Gifts Needed	Qualified Prospects Needed	Prospects Identified	Prospect Gap	Future Prospects Identified
\$5M+	5	15	10	(5)	15
\$1M	15	45	50	5	75
\$500K	25	75	50	(25)	150
\$100K	100	300	400	100	250
\$25K	325	975	600	(375)	1250
>\$25K	Many	Many	Many	Many	Many

- Where are additional prospects needed?
- Where will they come from?
- How many need to be qualified and moved into active management?

Poll:

How would
you rate your
effectiveness
using data?



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Top of the pyramid: Art not science



Known prospects



Few who have the ability to give keystone gift



Do you know their personal mission statement?

- Background/history
- Pivotal life events
- Other charities
- Key motivations

Top of the pyramid: Art not science



Integral to your
campaign planning

Where donor interests
meet university needs

“Launching gift”

Secure prior to study
or announcement

Middle of Pyramid: Science



Analytics to develop
management system



Pipeline management



Portfolio balancing



Reports are critical



Donor qualification



What is a qualified donor?

Art vs. Science



What is your process?



Deploying staff resources

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Questions for Qualification

Was I able to confirm initial thoughts about capacity?

Did I learn information about linkages – who the prospect may know, or how they may ultimately connect?

Did I learn preliminary information about the prospects areas of interest, which may ultimately map to our priorities?

Did the prospect demonstrate an inclination to support us at a major gift level, in the near future, with the proper cultivation?

Lower end of pyramid

Records and numbers

Segmentation
using scores

Communications
and events

Helping donors to
self-identify

Positioning for next
campaign



Preparing Staff



You need to inspire them!

Meeting with
campaign chair



Evangelists vs MGOs



Feasibility Study role



Training and support



Clear metrics

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Campaign volunteers: finding

Biggest asset;
biggest pain in
your asset

Find your
champion; build
around her/him

Close-in, hand
picked group

One good
volunteer worth
all the effort

Don't skimp on
training

Inspire, don't
scare

In Conclusion



Simplify your donor pyramid

Keystone/Lead Gifts
Major Gifts
Community Gifts



Simplify your volunteer structure



Use data wisely to identify prospects



Qualify!



Questions?

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Fundraising Materials that Work
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