



Building a Powerful and Reliable Major Donor Program

With Kim Klein

KLEIN & ROTH CONSULTING

Real money. Real people. Real change.

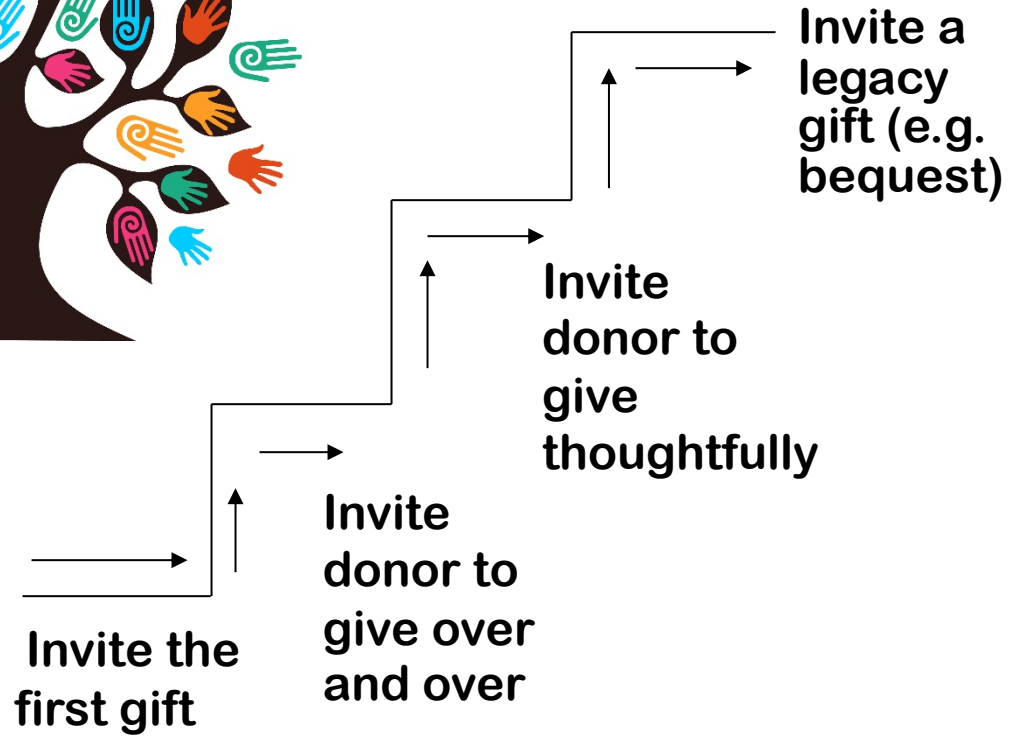
About the Presenter

Kim Klein is a principal at Klein and Roth Consulting and the author of five books. Her classic text, Fundraising for Social Change, now in its seventh edition is used widely in the field and in university programs. She has provided training and consultation in all 50 United States and 22 other countries. She recently retired from teaching at the School of Social Welfare at the University of California, Berkeley. She lives in Point Reyes Station, CA.





The Purpose of Fundraising is to Build Relationships



Giving is Changing



- ▶ Gifts can start at any size
- ▶ Donors will be episodic
- ▶ Fewer regular annual donors
- ▶ Many people bypassing nonprofits altogether
- ▶ Competition with disasters and political campaigns

Does Every Entry Point Invite a Donation?

If I found out about your organization from:

- ▶ your website
- ▶ your newsletter
- ▶ a friend
- ▶ an event
- ▶ dropping by your office



Would I know that you raise money from people like me?

Talk about Money



Giving is an Exchange of Values

Go from this:

“Please, please, please...”

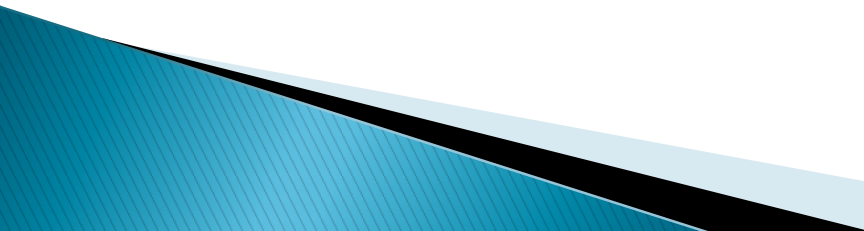


To this:

“I think you would be interested....”



Steps to a Great Major Donor Program

1. Have a clear case for needing bigger gifts.
 2. Keep useful information about your donors in a well functioning database.
 3. Build a team of people who each have a portfolio of donors and prospects.
 4. Provide “touches” for portfolio managers.
 5. Ask donors for money directly and clearly at least once a year.
 6. Rinse and Repeat.
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Case is Easy to Understand



You have a GOAL and a PLAN

Goal: \$50,000

# of gifts	Size	# of prospects*
2	\$5,000	8
4	\$2,500	16
10	\$1,000	30
20	\$ 500	40
40	\$ 250	80
76 gifts		174 prospects

** You will need at least 2 times the number of prospects as the number of gifts.*

Recruiting Team Members

What makes a good fundraising team?

Clear expectations

Meaningful work

Time off

Honest discussion



Team Members Take Risks



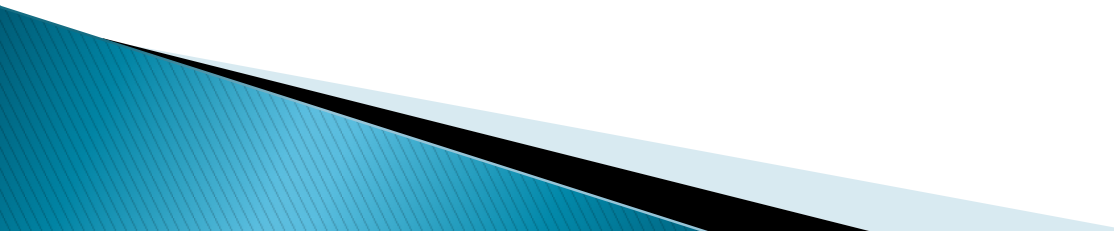
How to Find Team Members

- Former board and staff
- Long time volunteers
- Donors who have recently upgraded their own gift
- Recently retired professionals

No one is insulted to be asked to be on this team.



Building a Portfolio Program

- ▶ 5-15 donors and prospects
 - ▶ Must be in touch 3-4 times a year, including one direct ask
 - ▶ Team members may choose their donors or have them assigned
 - ▶ Team members send in information about contacts, conversations and any other useful data for the database.
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Sample Portfolio Page from Land Conservancy

Donor: Jessica Michaelmas

Giving History: 2010-2016: \$2000 per year, usually in November
 2017: \$5000 at request of board chair
 2018: \$5000

Personal information: mid 80's, decent health, husband died in 2010. No children. Active in League of Women Voters and Library Foundation. Her beautiful garden is her main hobby.

2019 Record of Contact:

1/12; Called to invite to film screening. Doesn't like to go out at night.

3/17: Offered to bring to Appreciation Picnic. Said yes, but got sick and cancelled.

3/22: I stopped by with program book. Had a nice chat at the door.

3/30: Sent \$250 donation. Not clear what prompted that. Called to thank.

6/20: Sent a note letting her know about our new hire.

7/16: Arranged visit to discuss our annual campaign. Niece visiting; we will meet in August.

NEXT STEP: INVITE ON LAND TOUR. STRESS TRAIL UPGRADES.



About “Touches”

Goal: be in touch with donors 4-6 times a year.

“Touches” include:

- ✓ **Thank-you notes**
- ✓ **News about your organization**
- ✓ **Invitations to events**
- ✓ **Requests for advice**
- ✓ **Requests for other engagement**

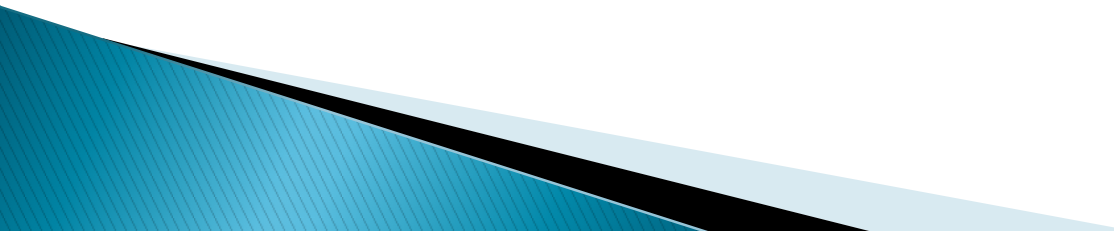
Touches must be authentic and personal.



What Happens In Real Life

Donors vary.

Some:

- never respond.
 - don't respond at first.
 - respond to some things and not others.
 - really appreciate your effort.
 - respond to almost everything.
 - are warm sometimes and frosty others.
 - reach out to you when they have questions.
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Focus on Real Prospects

Access:

Prospect knows you or someone who knows you.

Ability:

Gives away money.

Affinity:

Cares about this cause or something similar.



Gather Information That Helps

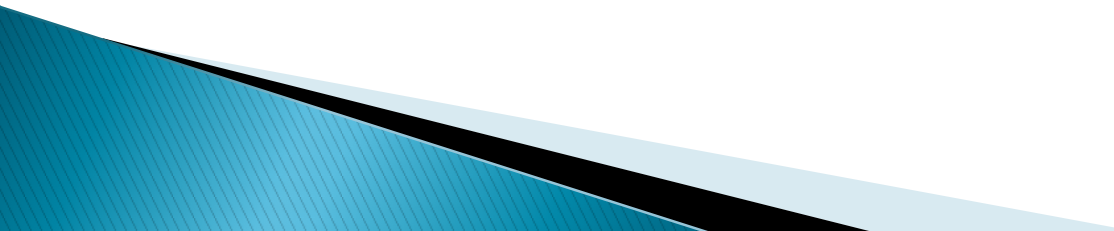
Less Helpful

- ▶ Democrat
- ▶ Active in local politics
- ▶ Very low key about giving
- ▶ Switched from Green Party.
- ▶ Ran for City Council twice and lost.
- ▶ Now prefers giving to community organizing efforts.
- ▶ Does not believe donors should get anything for their giving.
- ▶ Turned down being honored at Gala.

More Helpful



Finding the Time

- ▶ **Create your list, then re-order it as follows:**
 - **People most likely to say yes to giving more**
 - **People most likely to say yes to something**
 - **People we don't know what they will say**
 - ▶ **Every MWF morning at 9 a.m. call two people, starting at the top.**
 - ▶ **Make a bet with another team member that you can find more donors than they can.**
 - ▶ **Go with more experienced people for awhile.**
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Focus on What Is Important

IMPORTANT

LIVE HERE

NOT IMPORTANT

NOT HERE

URGENT

NOT URGENT

What is next for you?

What are the small changes you could make that would lead to big changes in your major donor program?

