



# Your Donor Priority Plan

# About Today's Webinar...

- Mid-level and major gifts focus
- Submit questions via the Q&A
- Follow up with us if you have more questions

# Unquestioned Priorities



Organize donor projections and priorities



Communicate impact



Identify major gift donors and prospects and create strategies



Identify mid-level donors and create strategies



Engage and deploy your board

# Overall Table of Gifts

<b>\$1,000,000</b>										
<b>Gifts</b>						<b>Number of Prospects</b>				
	<u>Amount</u>	<u>Number of Gifts Needed</u>	<u>Subtotal</u>	<u>Cumulative</u>	<u>%</u>	<u>Needed</u>	<u>Identified</u>	<u>Closed Gifts</u>	<u>Prospects Still Needed</u>	<u>Needed Factor</u>
	\$100,000	1	\$100,000	\$100,000	10%	3			3	3
<b>40%</b>	\$50,000	2	\$100,000	\$200,000	20%	6			6	3
	\$25,000	6	\$150,000	\$350,000	35%	18			18	3
<b>40%</b>	\$10,000	15	\$150,000	\$500,000	50%	45			45	3
	\$5,000	25	\$125,000	\$625,000	63%	75			75	3
	\$2,500	45	\$112,500	\$737,500	74%	135			135	3

# Sample Name-by-Name Table of Gifts

<u>Realized Table of Gifts</u>					<u>Projected Table of Gifts</u>						
<u>Giving Level</u>	<u>Last Year's Donors</u>	<u>Last Year's Totals</u>	<u>This Year to Date - Donors</u>	<u>This Year to Date - Totals</u>	<u>Potential Donors</u>	<u>High</u>	<u>Low</u>	<u>Probable</u>	<u>Solicitation By Date</u>	<u>Relationship Manager</u>	<u>Solicitation Type</u>
<b>\$50,000</b>		<b>\$55,000.00</b>		<b>\$0.00</b>	<b>\$50,000</b>						
	XYZ Foundation	55,000			XYZ Foundation	100,000	25,000	50,000	9/30/16	Jane Smith	Face-to-Face
<b>\$25,000</b>		<b>\$30,000.00</b>		<b>\$0.00</b>	<b>\$15,000</b>						
	Bob & Mary Smith	30,000			Bob & Mary Smith	40,000	10,000	25,000	8/15/16	Carl Carlson	Face-to-Face
					John & Jill Jones	30,000	10,000	25,000	8/31/16	Jane Smith	Face-to-Face

# Prioritization Considerations

- Where are they on the table of gifts?
- What is their capacity (short-term & long-term)?
- Where is your organization on their list of philanthropic priorities?
- Is there are chance that standing could change?
- Are there opportunities with particular individuals or groups?

# Working Your List

## Research

- What do you know? What don't you know?
- How will you find out?

## Plan

- What outcome do we expect?
- How will that outcome best be achieved?

## Engage

- What is the next step (who, when, what, how)?
- Prepare, execute, follow-up

# Good Donor Planning Hasn't Changed

## Goals & Outcomes

- Major Gift Ask Amount
- Annual Gift Ask Amount
- Engagement Goal
- Other Desired Outcomes

## Current Status

- What do we know?
- What else do we need to know?
- What needs to happen before we can achieve our outcomes?

## What are your next three steps?

- Research
- Engaging Partners
- Engagement
- Stewardship
- Solicitation



# Moves Tracking Worksheet

Donor	Measurable Objective	Move	Who	When	Result in a yes to:
Margaret Smith	Continue momentum created at February event with tangible next step	Phone Call	Bill (CDO)	April 15	Yes to hosting vision meeting in June
Mike Jones	Find out how business is being impacted and what their philanthropic outlook is for the rest of the year	Email	Anne (CEO)	April 17	Yes to taking phone call from Bill next week
		Call	Bill	April 24	Yes to attending virtual discussion forum on 5/3

# Engagement Criteria

Is two-way and interactive

Advances the mission and vision, concretely helpful

Personally meaningful and satisfying to the donor

Has “think” “feel” & “do” components

Opportunity to achieve a strategic donor initiative or “move”

# Making Interactions Count

## Activities

Can happen in any order

Have no end goal toward which you are working

May or may not be personalized

## Moves

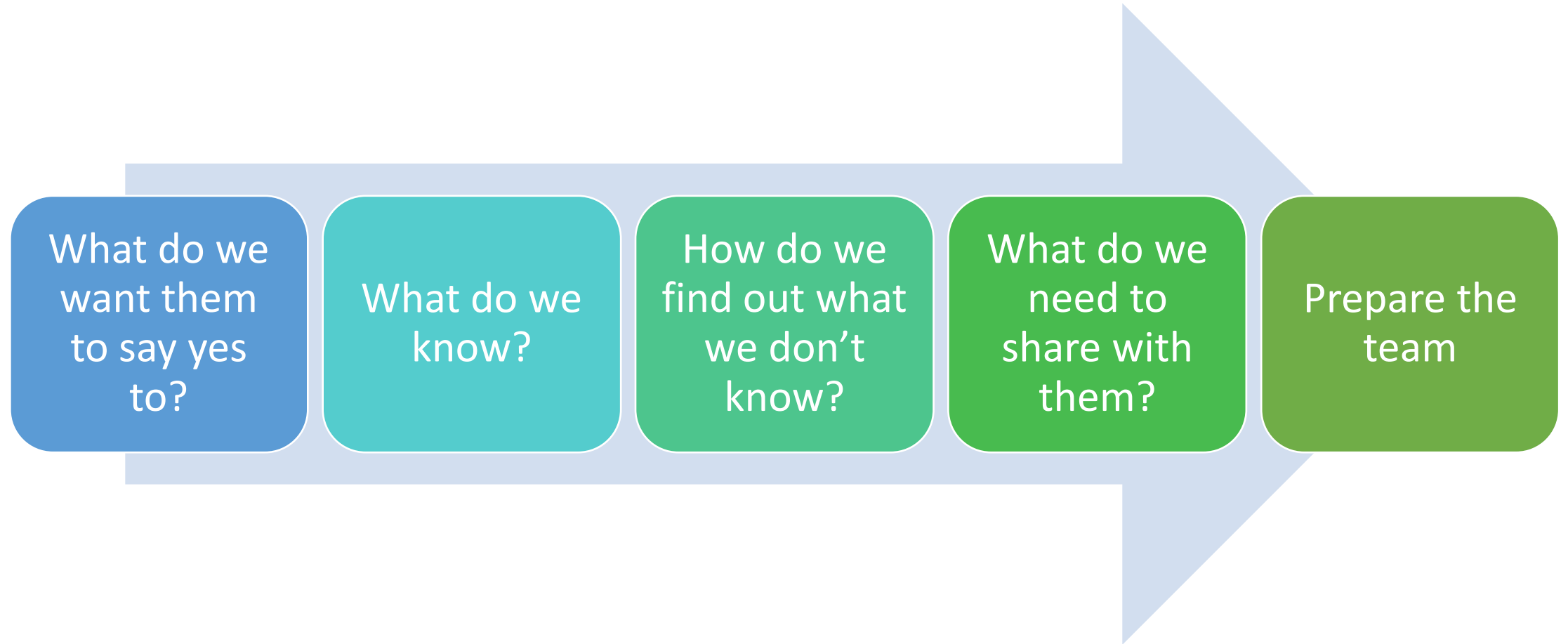
Are strategic - planned and adjusted as a sequence

Have an end goal in mind

Are personal & tailored

What is your current  
suite of engagement &  
stewardship  
opportunities?

# Five Step “Visit” Prep



# It's a 30/70 Conversation



# Rules of Board Engagement



Be realistic



Be specific



Be supportive



Be proactive

# Assessing Roadblocks

Have I bitten off more than I can chew?

Ask for Help

Delegate



Is this actually important or necessary?

Re-Prioritize

Stop



Do I have the tools I need?

Find Resources

Assess Timeline



Is this about self-confidence?

Talk It Out

Diagnose & Address Challenges



# Creating Urgency

Recognize Lack  
of External  
Urgency

Make Priorities  
Public

Identify  
Incentives

High Drive  
State

Price of  
Inaction

Questions?  
Want to learn  
more?



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