

St. Peter's Episcopal Church, Seward, Alaska.
Photo courtesy Jim Witkowski.



PROJECT RESOURCE

TRAINING SPONSORS



Major Gifts

The 5 W's

Notes:

When Do Donors Give Major Gifts?

- **Annual Stewardship (and end-of-year gifts)**
- **Life Event (birth or death, marriage, etc.)**
- **Capital Campaign**
 - Lead gift / matching gift
 - Naming opportunities
- **Planned Gift**
- **Direct Ask for a Special Project**
 - Building/maintenance project not associated with a capital campaign
 - New ministry
 - Specific need (e.g., new banner or chalice; furniture for a Sunday School room)

Major Gifts

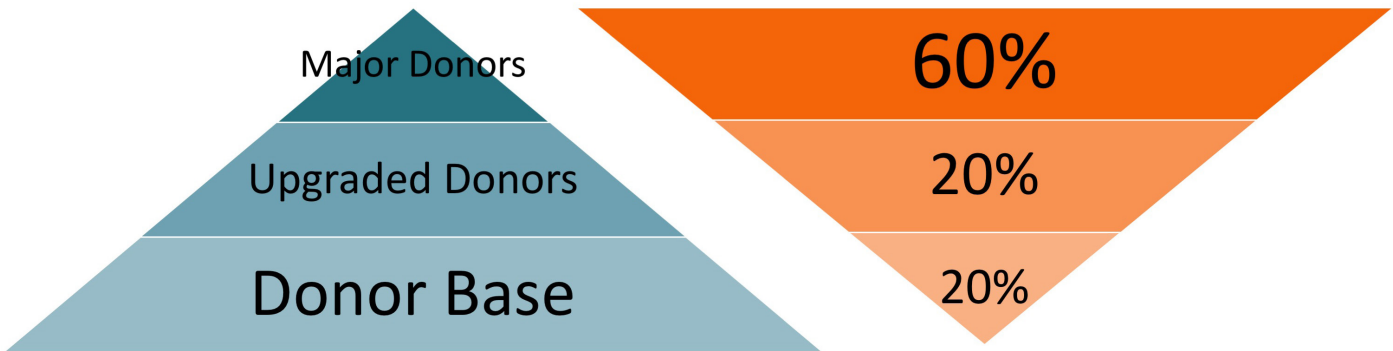
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What Is a Major Gift (for you?)

- **Hint: It's All Relative!**
- **Rules of Thumb:**
 - Top 10% of all donors (could be 2-3 individuals/households)
 - Top 60% of all dollars given (around 5-10% of total campaign goal)

Notes:



***Over the past year, this has transitioned to 90% of income raised by 10% of membership. It remains unclear if this is episodic or a long-term shift in major giving. This does impact the threshold of what a major gift is.



Discuss:

What qualifies as a Major Gift to your congregation or diocese?

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Notes:

Who Gives Major Gifts? (Good...)

- **Linkage** – Is the donor connected to the congregation or faith community?
 - Strong prospect: Attends worship
 - Weak prospect: Your neighbor
- **Ability** – Does the donor have the financial capacity to make a large gift?
 - Strong prospect: All research points to wealth
 - Weak prospect: All research points to financial difficulties
- **Interest** – Is the donor interested in the project or program that needs funding?
 - Strong prospect: Already funds a similar program at a local nonprofit
 - Weak prospect: Has never expressed interest in the project

Who Gives Major Gifts? (Better!)

- **Linkage** – How deeply is the donor connected to the congregation or faith community?
 - Strong prospect: Former vestry member; head of Altar Guild; third-generation member...
 - Weak prospect: Christmas and Easter worship
- **Involvement** – Is the donor involved in planning and strategy?
 - Strong prospect: Participated in strategic planning process
 - Weak prospect: Has little idea how congregation or faith community is run or decisions are made
- **Advocacy** – Has the donor been an active voice for the congregation or faith community?
 - Strong prospect: Has volunteered in past annual stewardship campaigns
 - Weak prospect: Has never attempted to promote church to others

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The Constituency Model

Friends of members
Former members
All Episcopalians



Source: Modified from The Fundraising School (2011)

Where Do Donors Give Major Gifts?

Organizations that matter most to them!

Notes:

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Notes:

The Wheel of Roles & Responsibilities



Source: Modified from The Fundraising School (2011)

Research

Giving USA: Where donors give gifts

<https://givingusa.org/tag/giving-usa-2018/>

Episcopal Church Community Profile: demographics & giving trends

<https://www.episcopalchurch.org/research-and-statistics/>

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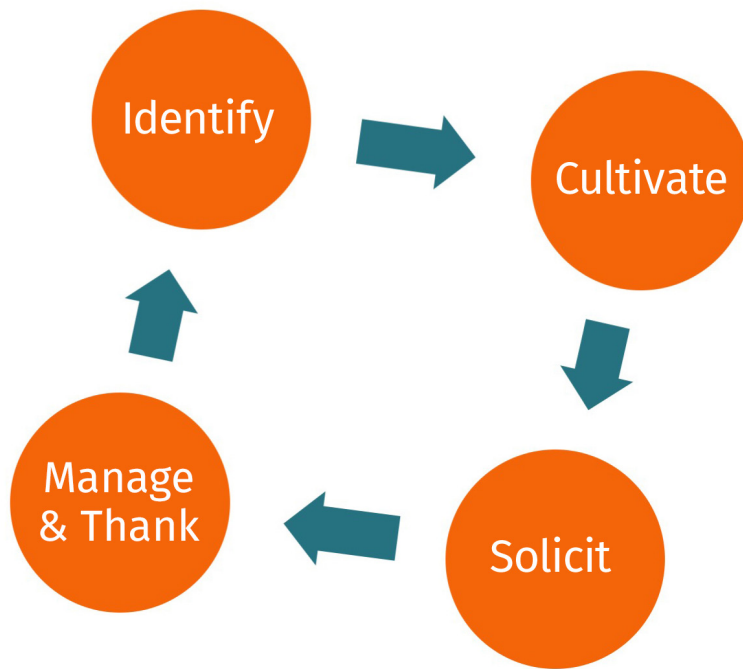
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Why Do Donors Give Major Gifts?

Top Three Reasons:

1. Being asked by someone you know well.
2. Because you volunteered at the organization.
3. Being asked by clergy to give.



Source: Independent Sector

Notes:



Discuss:

Recall a time when a major gift has transformed your congregation/diocese OR has transformed the donor.

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Notes:

The 8-Step Process

Prep

1. Prayer
2. Identification/Qualification
3. Development of a Strategy and Timetable

Action

4. Cultivation
5. Solicitation and Negotiation
6. Acknowledgement and Follow-up

Follow-up

7. Administration
8. Renewal

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The 8-Step Process: Identifying and Qualifying Prospects

#1 Prayer

Holy God,

There was Eden, and then there was east of Eden;

Which is all to say—this world is not what you intended it to be.

You planted a garden and dreamed of Sabbath—and it was good.

It was so very good.

However, when we look around today, we know that we have lost our way.

So today we bring our hearts, minds, and money back to you in hopes that you will sow good. This is the work of restoration, for we want to be a restoration people.

Use these gifts for your hurting world.

Restore us to you, oh God.

Amen.

* from *Sanctified Art*, 2020

#2 Identification/Qualification

How do you draft your list of potential major gift prospects?

- Careful thought
 - Use the Constituency Model
 - Pastoral discernment and knowledge of prospect's life circumstances
- Research
 - Consult annual giving history
 - Search online for publicly available philanthropy

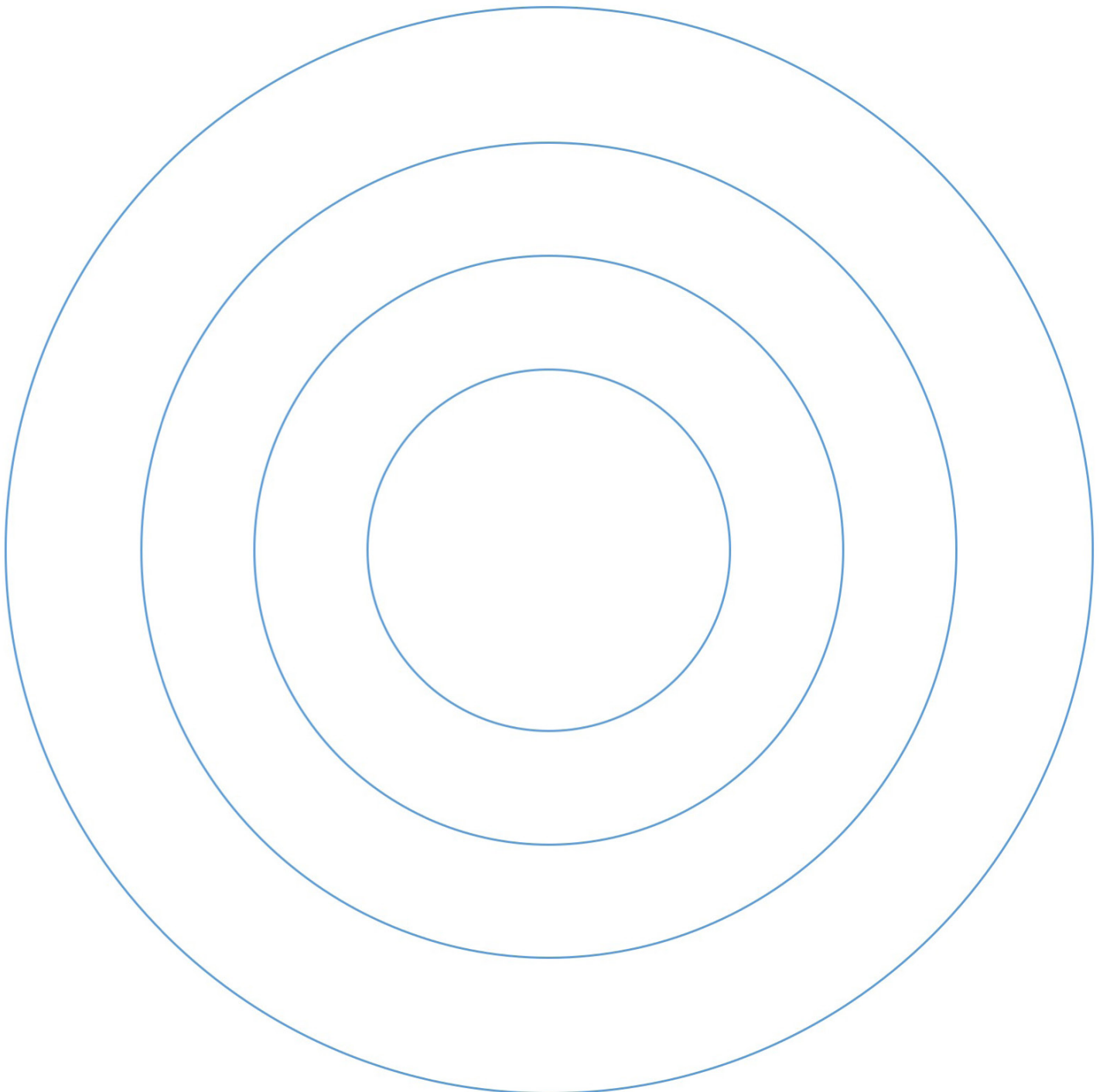
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Your Turn: The Constituency Model

Identifying your potential major donors



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Your Turn: Constituency Model Activity

Work alone or in pairs to label each ring for your congregation or diocese.

Generate names of three individuals in the inner three circles (9 total names).

Notes:



Discuss:

Which rings are the most consistent and generous givers?

How might you draw individuals toward the center?
(Hint: think LIA. See page 54 for ideas.)

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Notes:

The 8-Step Process: Strategy

#3 Develop a Strategy and Timetable

1. Articulate the Why

- a. Mission and vision of congregation/diocese
- b. Connect the need to your Why, the mission, and vision
- c. The 4 Questions:
 - What is the project?
 - How much does it cost?
 - Who decided?
 - What do you want from me?

2. Create the Congregation's Wish List

- a. Project
- b. Cost
- c. Timeframe

3. Plan your contacts

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The 8-Step Process: Shepherding Process Tracker

#4 Cultivation → #6 Acknowledgement and Follow-up = Shepherding Process

- 6 Cultivation Contacts
- 1 Ask
- 1 Follow-up

Take-Home Activity:

The meeting between the desires of the donor and the desires and needs of the congregation

| Name | Cultivation 1 | Cultivation 2 | Cultivation 3 | Cultivation 4 | Cultivation 5 | Cultivation 6 | Ask | Follow-up |
|------------|-------------------------|--------------------------------|------------------------------|--|---------------------------------|---|-----------------|----------------------------------|
| Smith, Joe | Dinner with Harry Walsh | Visit site of the new building | Lunch with Rector at Rectory | Meet with the architects to review plans | Meet with donor of similar gift | Visit similar church which has new building | Walsh, & Rector | Personal visit by Campaign Chair |
| | | | | | | | | |
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Notes:

The 8-Step Process: Designing the Ask Visit

#5 Solicitation and Negotiation

Where will the ask occur?

- Face-to-face
- Appropriate setting

Who will do the ask?

- Clergy
- Friend or individual with close connection

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Take-Home Activity: Designing the Ask Visit

Write bullets which outline the ask you are going to make to a specific person for a specific ask.

Notes:

The solicitation should take about 15 minutes.

1. The introduction (2 minutes)
 - a. Why are you here?
 - b. What is your common ground?
2. The preliminary to the ask (6 minutes)
 - a. Review the case.
 - b. If the donor gets bored, ask questions in which the donor states the case.
 - c. Ask if you have been understood.
3. The ask (2 minutes)
 - a. A specific amount is asked for and silence follows.
 - b. Conversation and negotiation (3 minutes) (imagine possible negative responses and how you would face them in conversation.)
4. The ending conversation (3 minutes)
 - a. Restate the case summary.
 - b. Restate the ask.
 - c. Restate the benefits of the gift.
 - d. Establish the next step.

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Notes:

The 8-Step Process: Thanking & Administration

#6 Acknowledgement and Follow-up & #7 Administration

How will you thank the donor?

- Receipt vs. thank you

Receipt sent by the CFO/treasurer/administrator

Thank-yous are written by the bishop/rector/clergy/warden

Ideas:

- Phone calls
- Hand-written notes
- Email or mail newsletters
- Videos and photographs
- Appreciation events
- Annual reports

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The 8-Step Process: Renewal

#8 Renewal

Beginning again from the beginning...

- When should you ask a donor to give again?
- Hint: It depends!

Notes:

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Notes:

Your Turn: “Make the Ask” Activity

- Find a partner. Take one envelope from the table for the two of you.
- Open the envelope. Read together the sheet in the envelope labeled “SCENARIO.”
- Choose who will be the “ASKER” and who will be the “DONOR.”
- Read the corresponding “DONOR” or “ASKER” card from your stack.
- Annnnd.... ACTION!



Discuss:

- How did the practice ask go?
- What was challenging about being the “ASKER”?
- What was challenging about being the “DONOR”?
- What was the most fun or satisfying part of the process?

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A Few Reminders...

- **Spirituality of Fundraising**

- For the Donor: Making a Major Gift offers donors an opportunity to draw deeper into the faith community and what they see as their part in building the Kingdom; their vision of being an “instrument of God’s peace.”
- For the Asker: Asking for a Major Gift allows the “asker” to use his/her gifts and passions to grow God’s work in this world.



For more on this topic, see Henri Nouwen’s book, *A Spirituality of Fundraising*.

- **Generative Mentality and Attitude of Gratitude**

- Being positive, hopeful, faithful, and grateful will always bring more success than attitudes that are negative, fearful, unfaithful, and ungrateful. See Christ in each other!

Notes:

Week 5 Homework

Notes:



Team Exercise:

1. Fill out your constituency model (page 9 of Virtual Binder)
2. Role Play by teams of 2 (page 14 of Virtual Binder)
3. Create a list of major gifts/dream list
4. Create a list of individuals with connections to passions and your congregation's needs

Taking Project Resource Further



Questions: Taking Project Resource Further

1. Establishing metrics: How will we establish baselines and analyses?
2. Accountability and transparency: How will we make this ministry a priority in our church/diocese?
3. How will we set measurable goals for systems change and increased giving?
4. Where might we experience barriers?
5. What new habits will we implement to live into a new narrative?

Notes: