

# **From Transactional to Transformational: Building Your Major Gifts Program Across Borders**

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## Workshop Faculty



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## How to get the most out of this workshop



**Talk!**



**Answer questions, ask questions**



**Be prepared to apply learnings to your organization**

## Learning objectives

- Build your confidence and enthusiasm for raising major gifts
- Address fears or concerns you may have:
  - Starting a major gift program
  - Creating major gift donor relationships
  - Expanding major gift programs across borders
- Share “best practices”
- Give you practical advice you can use immediately



## Agenda

- What is a major gift?
- Understanding major donor motivations
- Defining the essentials of a major gift program
  - Offers
  - Pipeline
  - Accelerators
  - Metrics and impact
- Your next steps



## What is a major gift?

- **Transformational** to organization—and to donor
- **Match interests** of donor with needs of organization
- Need is **reflected in strategic plan and objectives**
- Highly **dependent on donor giving history**
- Cultivation thoroughly **explores donor motivations**
- Each major gift is a **small campaign in itself**
  - Preparation
  - Prospect readiness
  - Appropriate deadlines
  - Acknowledgement



## Transactional vs. Major Gifts

	Transactional	Major Gifts
<b>Appeal:</b>	Same across audiences	Personal
<b>Level of Involvement:</b>	Doesn't affect ask	Greatly impacts size of gift
<b>Focus:</b>	Immediate gift	Significant philanthropic investment
<b>How Ask is Made:</b>	During first communication By "anyone"	By "right" team, after multiple meetings, when donor states "readiness"
<b>Gift Source:</b>	Donor's current cash	Current cash or other assets for best possible gift
<b>Recognition:</b>	Generic for all	Personalized and meaningful

## A Culture of Philanthropy

A shift in thinking from charity to philanthropic development

### Charity (giving)



### Philanthropy (investing)

Problem

Solution

About money

About mission

Short-term crisis

Long-term vision

Organizational needs

Community needs

Impulsive giving

Thoughtful investment

Short-lived satisfaction

Satisfying outcome



# POLL

Join at [menti.com](https://menti.com) | use code 5955 1036

 Mentimeter

What is a "major gift" for your organization?

All responses to your question  
will be shown here

Each response can be up to  
200 characters long

Turn on voting in Interactivity to  
let participants vote for their  
favorites



# DONOR MOTIVATIONS



## Major donors love BIG ideas that are...

- Generated from conversations – not sales presentations
- Aligned with their interests
- Supported by easy-to-understand financial info
- From organizations they trust and have a relationship with
- Able to produce measurable impact



## Truths about major donors in **EVERY** country

- Desire to understand and see:
  - Ambitious causes and visions
  - Impact with measurable results
- Appreciation for collaborations that yield results
- Interest in access to program experts
- Should be involved in:
  - Planning campaign strategies and engagement activities
  - Recruiting other key donors and volunteers



## Major donors



Often global citizens



Care more about outcomes and impact than organizational goals

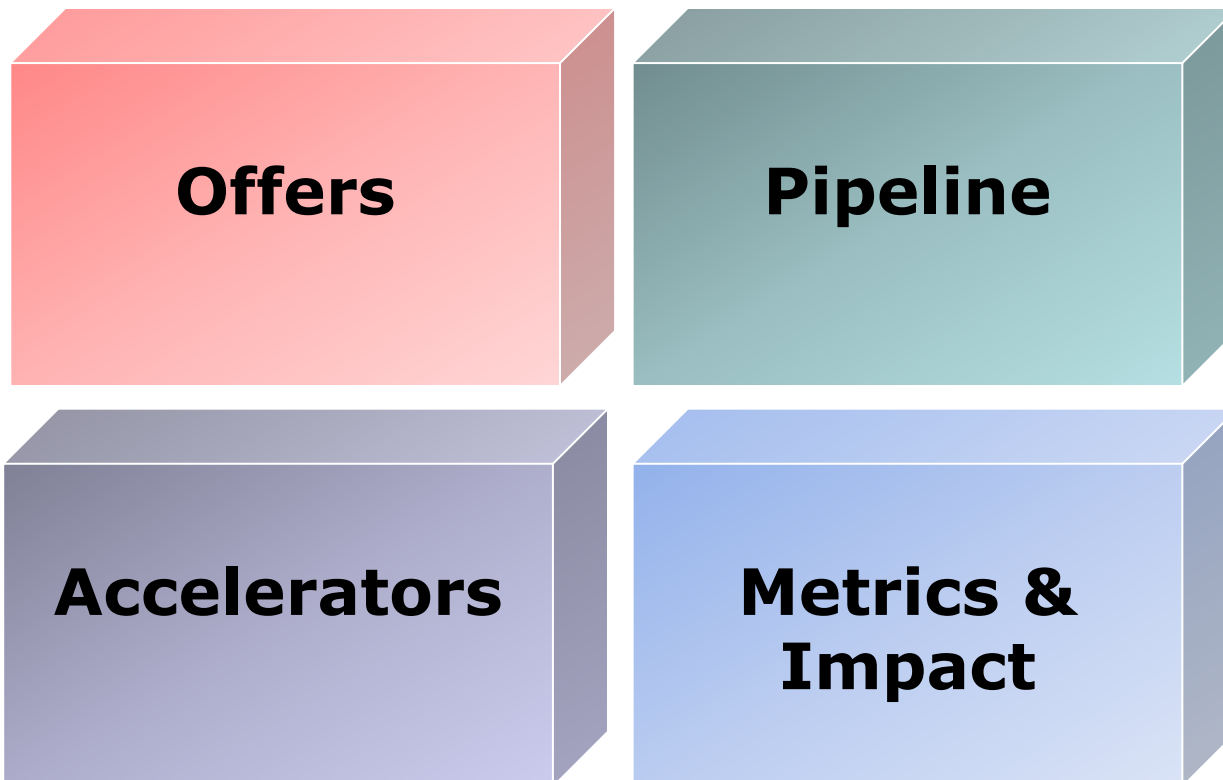


Can be difficult to reach without a connection

## **ELBOW PARTNERS DISCUSSION**

***Do you find consistencies or differences between what your organization wants and what major donors want?***

## Essentials of a Major Gift Program



# OFFERS



## Offers: what is your philanthropic brand?

### This...?

- Monthly giving
- Sponsor a child
- Crisis response
- Scholarships
- Events

### Or this...?

- Big vision
- Big projects
- Big opportunities
- Big gifts

## Major gifts offers



**Visionary**



**Measurable target**



**Backed by evidence-based models**



**Large/high impact**

- People helped
- Geographic area

## CASE STUDY

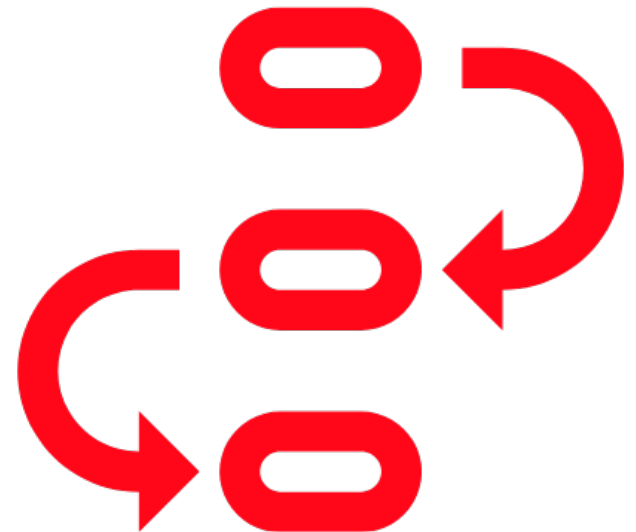


## **ELBOW PARTNERS DISCUSSION**

***Why would someone....***

- 1. Make a first gift to your organization?**
- 2. Make a second gift?**
- 3. Give CHF 5.000.000 to your organization?**

# PIPELINE



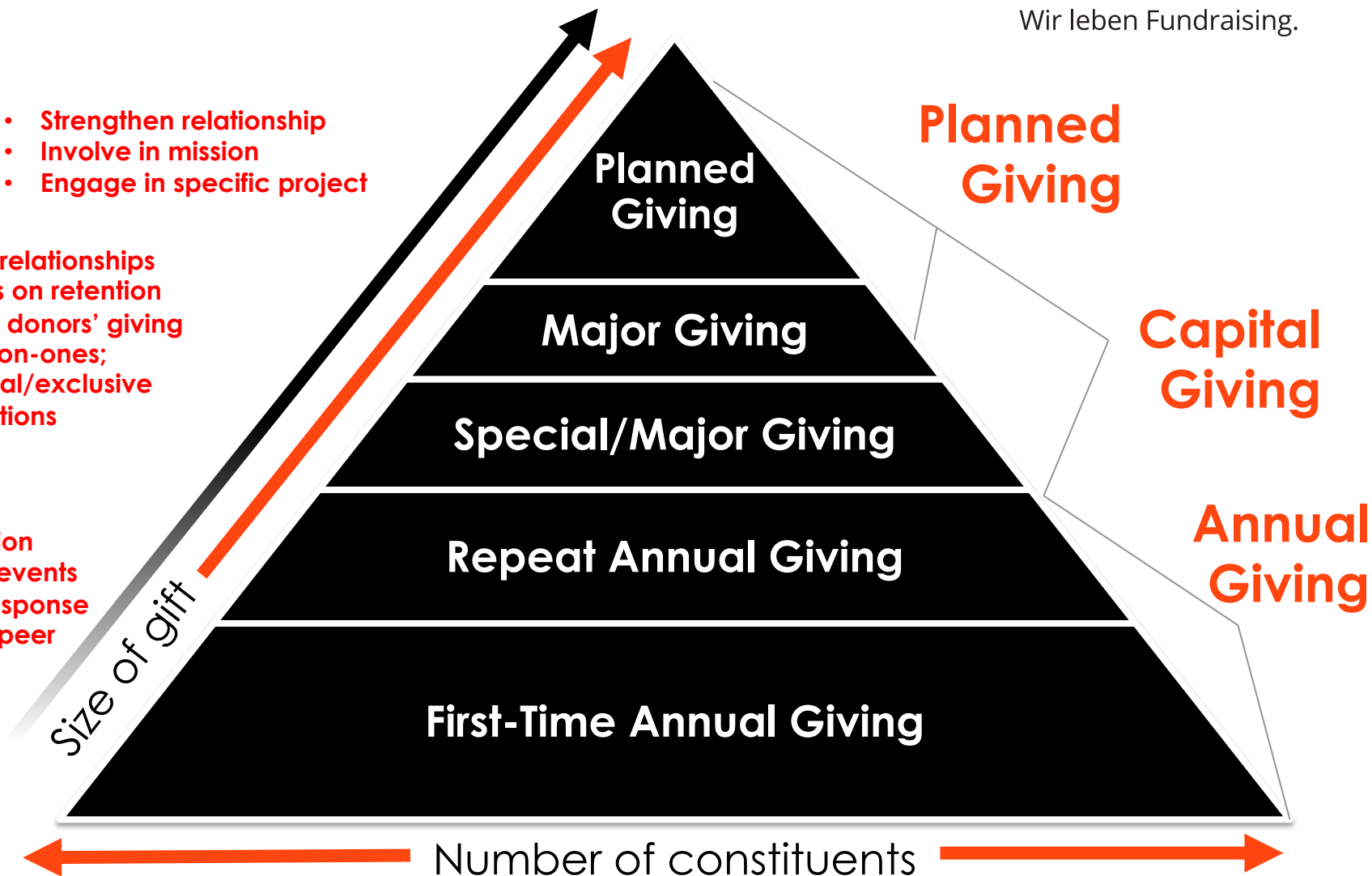
# Pyramid of Giving

swissfundraising<sup>+</sup>  
Wir leben Fundraising.

- Strengthen relationship
- Involve in mission
- Engage in specific project

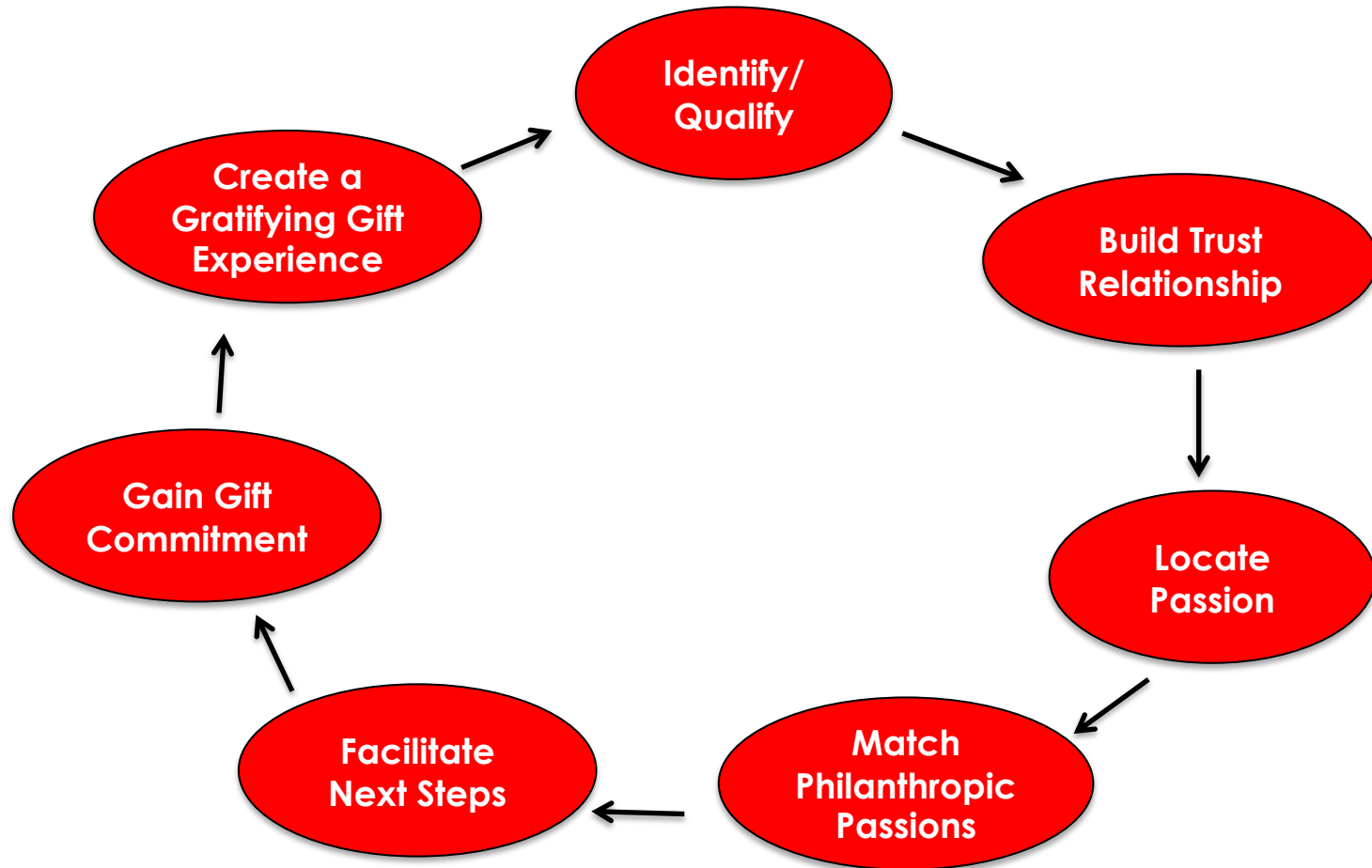
- Build relationships
- Focus on retention
- Grow donors' giving
- One-on-ones; special/exclusive invitations

- Acquisition
- Special events
- Direct response
- Peer-to-peer



Adapted from James M. Greenfield,  
*Fundraising Responsibilities of Nonprofit Boards*, 2<sup>nd</sup> edition

# Pipeline: The Donor Continuum



Not about the **money**. About what is **meaningful** to the **donor**!

## Pipeline development

Each “contact” should accomplish at least 2 of the following 3 goals:

### After this contact:

- **The prospect will feel...**
- **The prospect will know...**
- **I will know...**



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# ACCELERATING THE JOURNEY



## **How to make an exponential difference...**

- Identify donors' philanthropic priorities
- Introduce donors to subject-matter experts
- Involve donors in identifying others
- Involve donors in “making the ask”



## Major gift formula

$$ST(C+R+PC)=MG$$

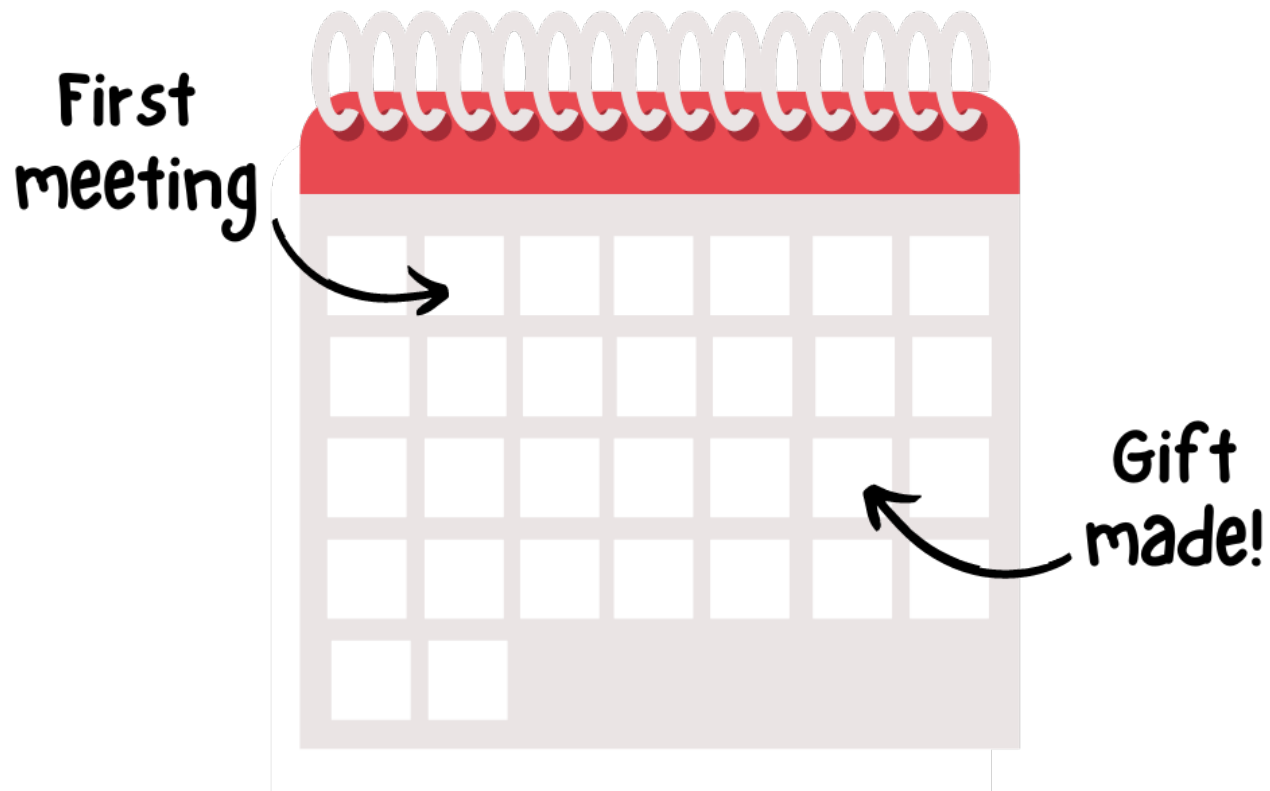
ST = Solicitation Team

C = Case for Support

R = Relationship with Organization and Solicitation Team

PC = Philanthropic Capacity of Donor

## CASE STUDY



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Choose one "accelerator" that is your top priority for improving at your organization.



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Identifying  
donors'  
philanthropic  
priorities

Introducing  
donors to  
subject-  
matter  
experts

Involve  
donors in  
identifying  
others

Involve  
donors in  
making the  
"ask"



# METRICS AND IMPACT



## Metrics and impact

- Agreement about how to collect metrics and provide seamless reporting
  - Where is the money going?
  - What impact is the money having?
  - How do you show individual donors their impact?
- Alignment is required across the entire organization
  - Leadership, development, field staff, finance, etc.
  - All offices - HQ, national, regional, local, etc.



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 Mentimeter

# How well-equipped is your organization to provide individual donors with the impact of their gift?



Needs significant improvement

My organization...

Is very well-equipped

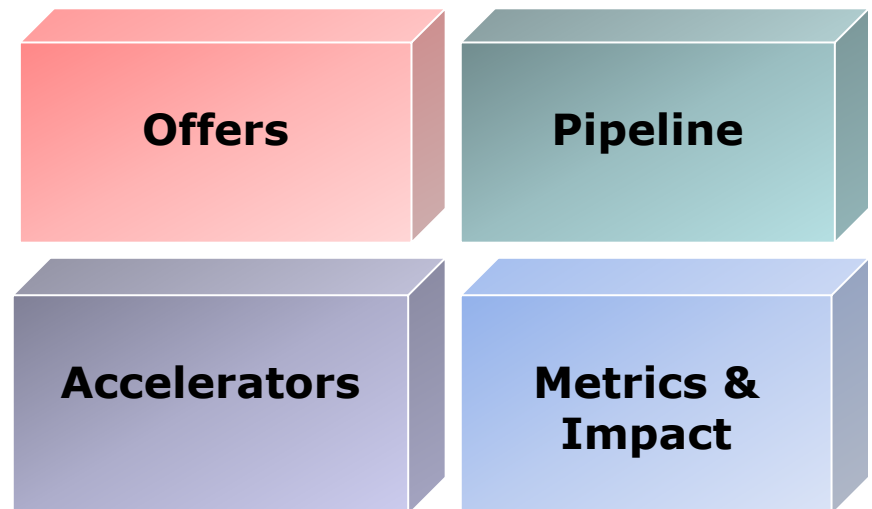


# YOUR NEXT STEPS



## Reviewing the flipchart

- Key themes and takeaways from your responses
- Commit today to 2-3 next steps to grow your major gifts program
- Any questions?



**Thank you! And let's stay in touch!**

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