



SHENANDOAH, VA CHAPTER

**Don't Leave Money on the Table –
Maximize Major Gift Opportunities for
your Organization**

**Timothy M. Winkler Sr., CFRE,
CEO Winkler Group**



- Trends
- Giving USA Stats
- Most effective use of development staffing and fund raising dollars spent
- More difficult but still effective



Trends

- “The majority of Americans will make their 2011 donations online rather than through the mail, in response to telemarketing calls, or other techniques.”
- “Online giving is now such a strong habit that donors at every age level prefer it. More than half of donors 65 and older said they would give online, the first time a majority in that age group said they would give via the Internet.”
- “Three-quarters of people 35 to 64 said they would give online, while 86% of those under



WINKLER GROUP

What is a Major Gift?



WINKLER GROUP

**Major Gifts take donors to the
next level of involvement with
your organization.**



WINKLER GROUP

**Cultivation and stewardship more important
than ever.**



WINKLER GROUP

Discovery calls.



WINKLER GROUP

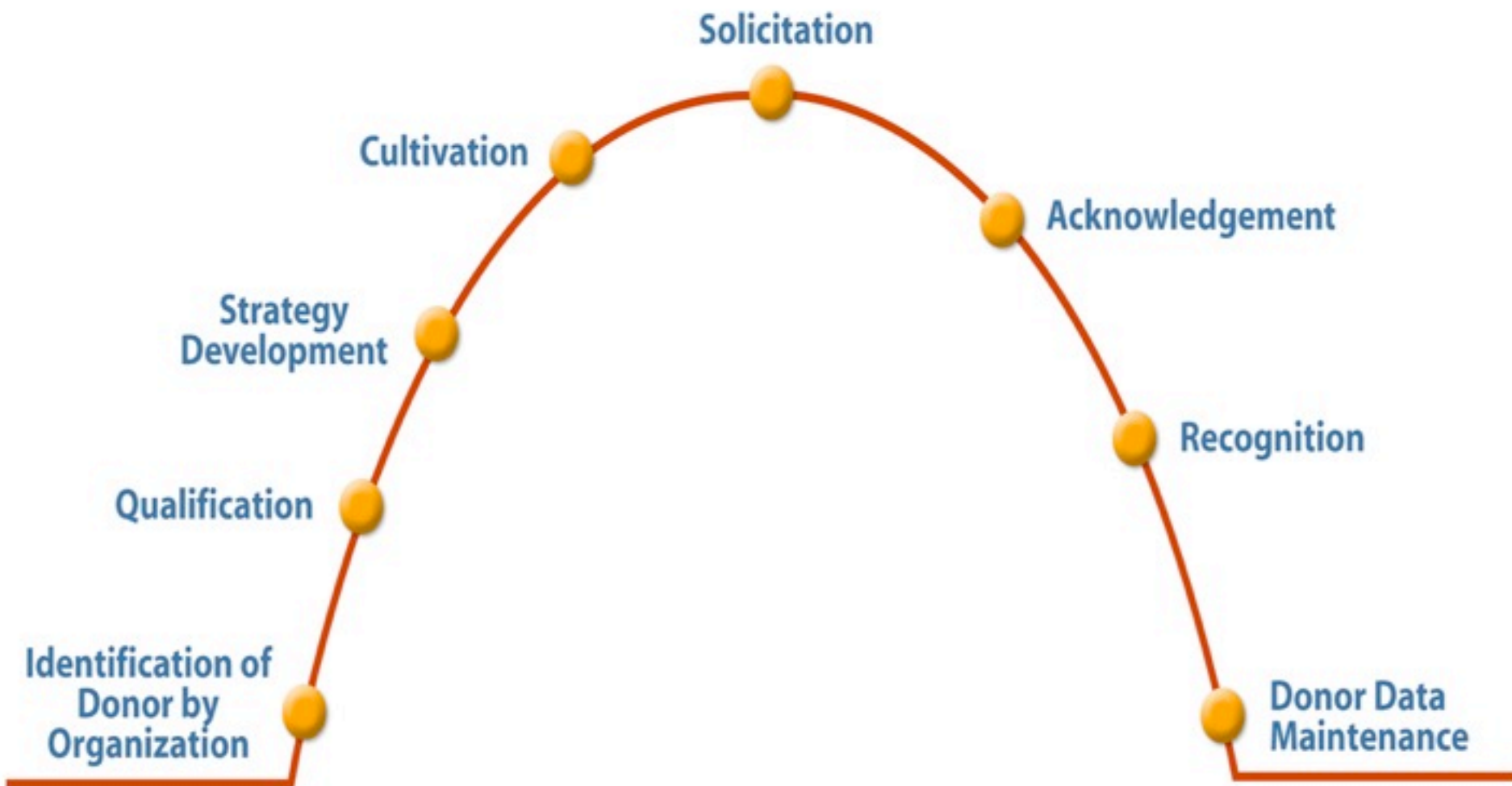
Biggest mistake organizations make is not having
prospects

PROPERLY QUALIFIED.

ABILITY **and** PROPENSITY

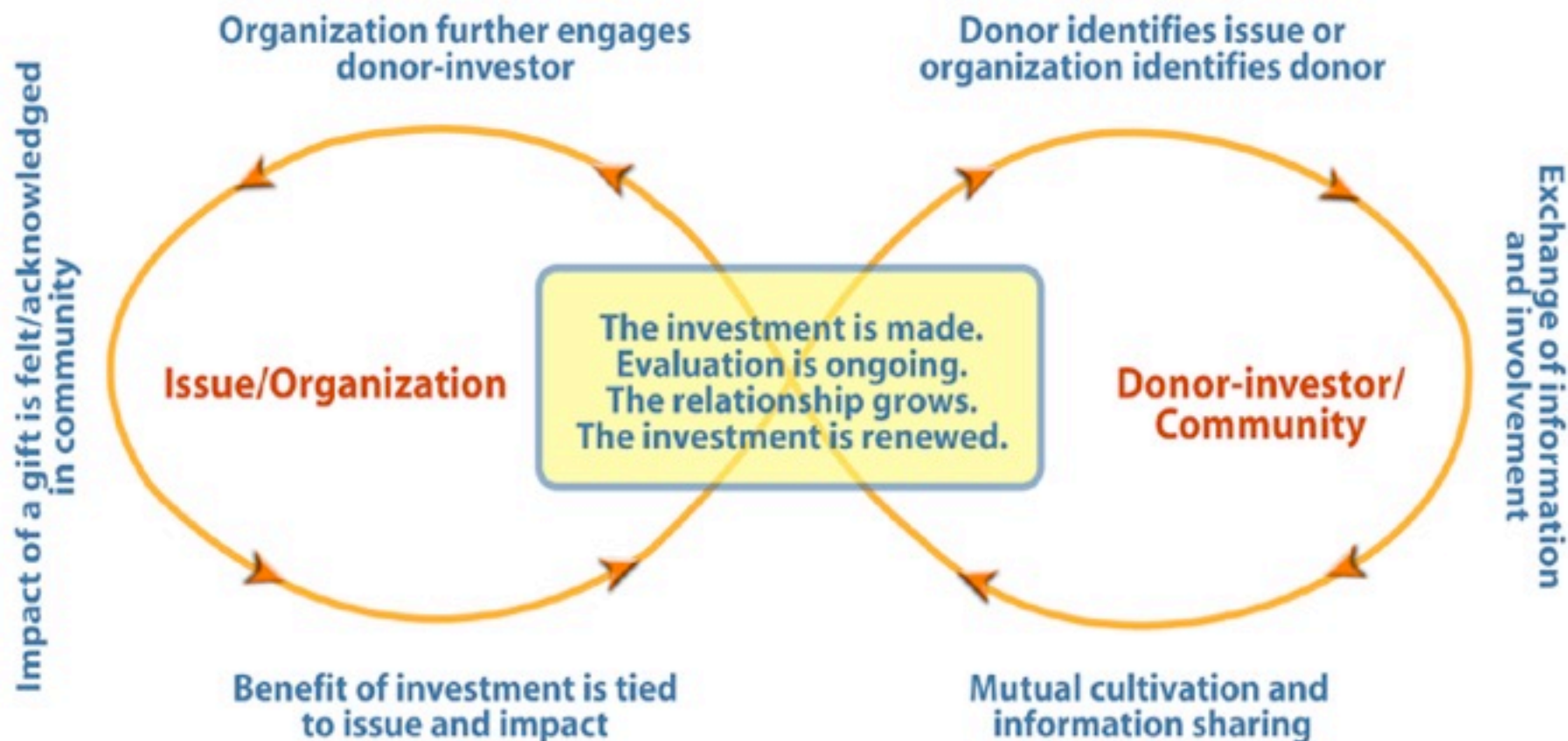


Transactional Giving: The Bell Curve





Transformational Giving: The Infinity Loop





- Top “25” list (remember to qualify)
- Determine amounts
 - 10x annual gift
- Donors give after 7 meaningful contacts
- 3 solicitations yield 1 gift
- Gift cycle of 90–120 days



Art of the Ask

Adages about asking, ALL TRUE!:

- You almost never get a gift if you don't ask
- You (or someone) must ask
- You must earn the right to ask (relationship, 7 meaningful contacts)
- Most common response to question, "Why didn't you make a gift?" is "No one asked me!"



No Is Never No, It's Just Not Right Now...

- **Timing**– might be bad
- **Project**– might be wrong
- **Amount**– might have missed the mark
- **Person**– might have been wrong



WINKLER GROUP

If you do your homework, believe in your cause,
and conduct yourself professionally, then you
have nothing to apologize for...

* More so now than ever.



WINKLER GROUP

Involvement = Ownership = Gifts



Benchmarks / Guidelines

- **First Year**– break even
- **Second Year**– 3–5x salary
- **Third Year**– 10–20x salary



WINKLER GROUP

CAUTION!!

Avoid “perpetual” cultivation



Remember...

- Steward and Cultivation
- Listen
- Involve
- Create ownership opportunities
- Involve other people in the process
- Be donor centered



Conclusion

- More competitive market
- Focus on the basics
- Engage and involve people
- Recognize it's a different environment
- Assure mission and vision will go on
- Don't apologize



References

- Calhoun, Peggy; ACFRE
- Grace, Sprinkel Kay and Wendroff Alan, High Impact Philanthropy
- Gray, Don; VP University Wisconsin Foundation
- Miller, Richard G.; CFRE



THANK YOU!

The Winkler Group's Innovation Center is full of ideas and inspiration. Turn in your questions today and follow us on Facebook and Twitter for the answers.

