

Association of Fundraising Professionals
**2003 INTERNATIONAL
CONFERENCE ON
FUNDRAISING**

**So I'm supposed to cultivate
donors and prospects, the
relationship thing, but how
do I do it?**

Presented by Allan Arlett
March 2003



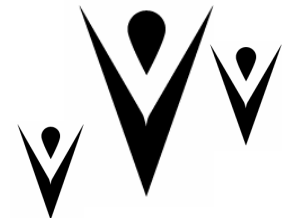
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MAJOR GIFTS

So I'm supposed to cultivate donors and prospects, the relationship thing, but how do I do it?

Introduction

Major Gifts of Growing Importance

Pareto's principle that 80% of any business activity being generated from 20% of customers/donors is certainly changing for fundraising.

Capital Campaigns – Increasing numbers of organizations are reporting a greater percentage of money coming from a smaller percentage of donors – a growing trend is 95% of gifts coming from 5% of donors.

Annual Giving – In the past Pareto's principle was less true in its literal sense for annual giving. The percentage of dollars coming from top donors being often more like 60%-70-% of dollars coming from 20% of donors versus 80% from 20%. We see growing numbers of organizations reporting a change with a greater percentage of dollars coming from fewer donors. Ken Burnett reports, for example, that "Britain's Royal National Lifeboat Institution, which at some time or other touches everyone in the land, gets more than 80% of its annual income from less than 2000 people."

The question that is prompted by this trend is whether our offices/staffing reflect this reality?

The Move to Relationship/Donor Centred Fundraising

Spurred in part by the development of databases and software that enable us to better understand the patterns of giving to our organizations and the increasing sophistication of fundraisers "relationship/donor centred fundraising" has growing numbers of adherents. This move has also been greatly assisted by the work such as the United Kingdom's Ken Burnett through his two books on the subject, in

Canada by Penelope Burk, and by people such as David Dunlop and Buck Smith in the United States.

The strength of Burnett's groundbreaking work is that he prompts us to think about our relationship with all donors – not just those that fit into the major gift category. Many donors might well agree with Ken Burnett's assertion that people receive better customer service at McDonald's or their bank than they receive from organizations they support.

It may have taken us a while but we seem to be coming to recognize what many successful firms in the business sector have recognized for some time – good service/communications will be rewarded with customer/donor loyalty.

If it works for board members why not for others?

One of my early lessons from fundraisers that had been in the business a long time and who staffed organizations with established fundraising histories was that some of their better donors were members of their Boards. Many gifts came as a result of their participation on the Board. This was an obvious demonstration of the old adage that involvement leads to understanding and commitment, which in turn translates into financial support.

It may have taken a while for our field to learn it but having come to recognize that proactively seeking donor involvement leads to increased giving has resulted in significant resources being devoted to this activity in an increasing number of organizations. Major gift fundraisers are in high demand these days as organizations seek to hire staff to work with major gift donors/prospects. We are also seeing larger organizations creating staff positions devoted to the stewardship of donors.

While some organizations have greater opportunities to involve their donors than others – universities, hospitals and arts organizations come quickly to mind – the fact is that with some creativity all organizations can find ways to develop closer relationships. The challenge is to put in place a process to identify these

opportunities. Bill Sturtevant writes, “Cultivation is an elusive concept for some, which may explain why we often avoid discussing the issue at our professional gatherings.” This paper will look at the following components of cultivation:

1. gift acknowledgement
2. donor recognition (briefly)
3. stewardship
4. involvement activities
5. other considerations

1. Gift Acknowledgement

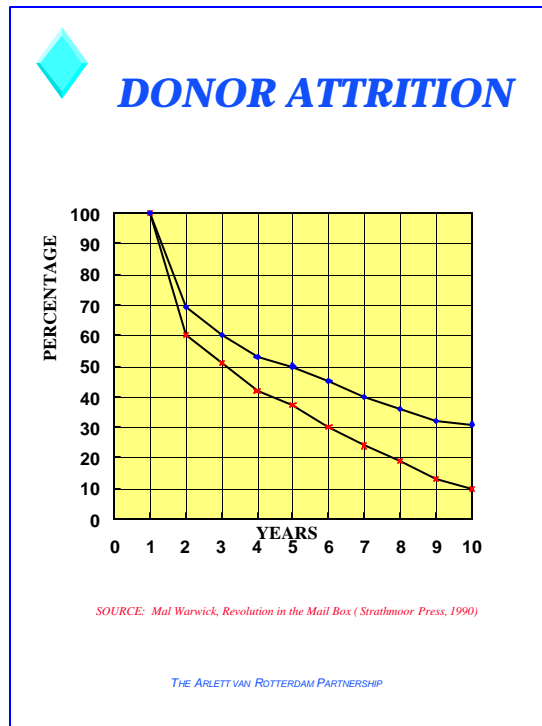
And at the Beginning... There Was Saying Thank You

Every organization has the opportunity to say thank you for each gift it receives. The disparity between organizations in the speed and quality of the thank you process is quite amazing.

The fact is that organizations lose more gifts between the first gift and second ask than at any other time. Having put time and effort into getting our new donor to the starting gate through their donation we run the high risk of losing them before we can even start the relationship. Some of those that are lost have the potential to become major gift donors but we will never have the opportunity to find that out.

The “Fatality” Rate of Donors

Mal Warwick, a national leader in direct marketing consulting in the United States, has been involved in analyzing the trends in giving to countless organizations. His observations on the longevity of the average donor to organizations are, to put it mildly, sobering. The following two charts identify his findings.



YEARS	Blue Line (%)	Red Line (%)
1	50-60	60-70
2	68-78	75-85
3	80-87	83-90
4	85-91	87-91
5	88-91	89-91
6	89-91	89-91
7	89-91	89-91
8	89-91	89-91
9	89-91	89-91
10	89-91	89-91

SOURCE: Mal Warwick, Revolution in the Mail Box (Strathmoor Press, 1990)

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Penelope Burk's Findings

Canadian Consultant Penelope Burk conducted a four-year national study on donor communications and recognition. It involved indepth interviews with 100 individual and corporate donors. The individual donors had been giving for an average of 33 years and to many causes (31% supported more than 20 charities each year). Burk writes that these are people “who occupy the ‘most coveted’ status in fundraising programs; they are representative of donors who can be counted on to remain loyal to the cause and increase their giving over time.” The corporate donors averaged support to 328 charities. In addition 111 charities completed a 41 page questionnaire on their recognition practices. Between them these charities had over 5 million active donors.

When Burk began the study she was focussing exclusively on donor recognition. But through her interviews she found that donors were saying while they appreciated recognition they really wanted something else. “They said they needed information, and if they got it, they would continue to give and they would make increasingly generous contributions. They said they wanted:

- prompt acknowledgement of their gift;
- reassurance that their gift “was set to work” as intended; and
- knowing the project or program where the gift was directed had/is having the desired effect.

Burk's Findings Regarding Acknowledgement of Gifts

	Individual Donors	Corporate Donors
Always receive a thank you letter	50%	37%
Usually receive one	34%	27%
Sometimes receive one	13%	20%
Seldom or never	4%	16%
<i>Length of Time for Thank You to be Received</i>		
Within 2 weeks	21%	16%
Within a month	39%	51%
Within 2 months	29%	28%
Longer than 2 months	11%	5%

Experience and discussions with fundraisers in other countries suggest that Penelope Burk's findings are not unique to Canada. Reading Ken Burnett's two books also drives that message home.

Relationship Fundraising Begins With a "World-Class" Thank You

Demonstrably some of us are not doing a very good job at the thank-you end of our work. Other organizations recognizing the high loss of first time donors, to give but one example, have initiated special "welcome packages" to first time donors and/or are having phone calls placed, not to ask for another gift but simply to say thank you.

At this point you may be saying to yourself – yeah, but what has this got to do with major gift fundraising?

Because we don't know the donor's potential to make a major gift when we receive the first gift from most of our donors we really need to get the thank-you process right for *all* donors. Let alone the other good reasons for this.

How many ways can you say thanks?

One of the realities of fundraising is that we can't be egalitarian. Even though some donors of large gifts may in fact be giving a lesser percentage of their income than others the fact is that certain expectations are attached to these gifts by some of their donors. Both from a pragmatic and resource perspective it makes sense to establish a thank-you hierarchy based on the size of gifts for donors.

Four steps are involved in establishing a thank-you hierarchy:

1. Conducting a gift range analysis of current donors. This will identify the dollar range gift categories that make sense for our organization.
2. Identifying the gift levels that we are going to be seeking in the future and having a plan in place to address these when they arrive. Combining this with current gift range analysis will ensure that we have a plan in place for the short and longer term.
3. Identifying the appropriate ways to thank donors at the different ranges.
4. Implementing the program we have designed.

An example of a gift acknowledgement chart is found below. It identifies *some* of the ways to thank donors at different dollar ranges. This activity is more private than donor recognition (i.e., donor walls, gift-clubs/recognition societies, naming opportunities, etc.).

EXAMPLE OF A GIFT ACKNOWLEDGEMENT CHART

ACTIVITY	\$1 MILLION Plus	\$500,000 +	\$250,000 +	\$100,00 +	\$50,000 +	\$25,000 +	\$10,000 +
<i>Personal Thank You</i>							
Telephone call from CEO							
Letter from the CEO							
Telephone call from Board Chair							
Letter from the Board Chair							
Telephone call from Fundraising Chair							
Phone call from staff/director of funded project							
Letter from staff/director of funded project							
Phone call from Director of Development/Major Gift Officer							
Letter from Director of Development/Major Gift Officer							
Meeting with CEO/Project Director							

2. Donor Recognition

There is an abundance of material on this subject and a variety of firms specializing in providing products to recognize donors. While not wanting to underestimate its importance in any way in the interests of time given the lesser amount of materials on other methods of developing a relationship with donors I am going to focus on the relationship aspect. However, we do not mean to underestimate the importance of donor

recognition as a motivator for many donors (though many of them deny this) and in providing role models for others in the short and longer terms. Obviously, in relationship/donor centred fundraising it is important that we provide recognition in keeping with the donor's wishes. It is worth noting in passing that there is a growing body of research that indicates that there are different gender preferences in terms of recognition.

EXAMPLE OF A DONOR RECOGNITION CHART

<i>Public Recognition of Donor</i>	\$1 MILLION Plus	\$500,000 +	\$250,000 +	\$100,000 +	\$50,000 +	\$25,000 +	\$10,000 +
Special article in newsletter/magazine							
Listing in annual report							
Name on cumulative donor recognition wall							
Personal invitation from Headmaster to graduation ceremony							
Listing in graduation/prize day program							
Other Opportunities							
Guest of honour at event hosted by CEO & Board Chair							
Reception/dinner hosted by CEO/Board Chair/Fundraising Chair Senior							
Event hosted by staff/director of funded project							
Invitation to annual Board dinner							
Invitation to other events as appropriate							
Other activities							

3. Donor Stewardship

As noted earlier one of the findings by Penelope Burk was that donors wanted to know the results of the use of their gift. What better reason could there be for having contact with a donor than to provide them with a report on the difference their gift made/was making?

EXAMPLE OF A DONOR STEWARDHIP CHARTS

<i>Stewardship</i>	\$1 MILLION Plus	\$500,000 +	\$250,000 +	\$100,000 +	\$50,000 +	\$25,000 +	\$10,000 +
Personal letter from CEO/Project Director reporting. Result of gift							
Yearly personal and/or written report to donor of results of donations, i.e., their gifts (donor decides method)							
Annual stewardship breakfast/lunch/dinner for donor with CEO & Board Chair							
Invitation to see results of gift in action (where applicable)							
Other opportunities							

4. Involvement/ Relationship Development Opportunities

The Internal Audit of Existing Relationship Development Opportunities

Before an organization starts investing in new relationship development opportunities we strongly recommend that it identify existing print and electronic communications, events and other activities it could use to involve donors. We can spend a lot of staff time creating new events where significantly less time is required to build on an existing activity.

**CHART TO IDENTIFY EXISTING RELATIONSHIP DEVELOPMENT
OPPORTUNITIES**

Method of Contact	Print/Electronic Communication, (e.g., letters, print media, websites, telephone)	On-Site Meeting	Off-Site Meeting
Personal			
Part of a Group			

Identifying Relationship/Donor Centred Activities

Experience has demonstrated that developing and sustaining a relationship with a major gift prospect requires frequent, consistent quality contacts. To help ensure this takes place what is known as the moves management system was developed in the 1970's at Cornell University by David Dunlop with Buck Smith.

As David Dunlop has noted, "If your organization does not enter the life and consciousness of a major gift prospect every few weeks, other charitable interests that do will be given priority for that person's ultimate gift. If the initiatives you take do not build on one another to create the necessary awareness, understanding, caring, involvement and sense of commitment, the likelihood of your

organization's receiving a prospect's ultimate gift is diminished. The frequency and continuity of initiatives are essential for your success."

We have ordered our findings in somewhat of a hierarchy – moving from one-on-one contacts to group and more general activities. We want to share with you some of the approaches that have been found to be effective by organizations. At the same time we have provided a brief listing of other ideas to prod your own thinking. We recommend that fundraisers initiate an audit of the existing activities their organization can capitalize on for cultivation purposes. We recommend that it is only after you have gone through this process should you think of adding to your organization's activities and workload.

Examples of Cultivation Activities

ONE-ON-ONE MEETINGS

Proactively Associating Donors with Projects

Obviously if the donor has been involved in supporting a particular program/project discussing this activity and how it fits into the overall work of the organization is the appropriate beginning point for a discussion. In the case of one of our clients if a donor sends a donation of \$1,000 or more without identifying a specific project the CEO writes suggesting they might find it rewarding to be able to see the results of their giving. A brief description of several projects is enclosed with the suggestion they earmark their gift for one of them. This provides the opportunity for the organization to send periodic progress reports on the project the donor has selected.

Prospect "Interviews"

Experienced major gift fundraisers are agreed that as long as you have identified the people you should be talking to, one of the best uses of a major gift officer is in face-to-face meetings with prospects.

Among the ways to get the door opened for such meetings with donors/prospects are the following:

- involving a volunteer in arranging the initial meeting with the person and having them use the occasion to introduce the major gift officer
- a letter from the CEO explaining that the organization is meeting with key donors to gain their input on some challenges facing the organization
- a fax or phone call from yourself requesting a meeting

You need a reason for the meeting. We all know that one of the best methods of involvement is to ask for a person's advice. Organizations usually have no shortage of items they can discuss with donors/prospects, for example:

- Reporting on the results of the program they have supported
- Advice on specific challenges facing the organization
- Asking for their reaction to a new case for support that is being prepared
- Seeking input from key constituents as part of a strategic planning process
- Asking advice within their area of expertise
- Discussing a volunteer task you would like them to consider
- Sharing with them plans for or results of a new initiative that is of interest to them

Additional Reasons for One-on-One Meetings with Prospects

- Thank them for their participation and report back on feasibility study
- Discussion of major issues facing the organization/sector
- Seeking their advice as part of a strategic planning process
- Deliver a personal invitation to attend an event
- Personal invitation to participate on a task force/advisory committee
- Invitation to come and speak to members of the organization
- Invitation to speak at an annual meeting
- Meeting to discuss presentation of an award to the donor
- Involving him/her in some special role at an event
- Personal invitation to a reception/dinner related to the organization
- Invitation to meet a special visitor to the organization
- Meeting as part of a study of donor relations
- Introduction of new CEO/Board Chair, key addition to staff
- Progress report/final report on a project they supported
- Personal interview of them for an article in a publication of the organization
- Request that they serve as an "ambassador" to the organization

Some organizations send a brief document about the future direction of the organization or an issue of importance in advance of a meeting. Our preference is to be able to arrange to see a person without such a document but rather to have this to leave behind at the end the meeting with the suggestion that a further meeting take place to discuss it. Obviously there can also be a document that is sent in advance and a separate one that is to be followed up with a further meeting.

The arrival of new development staff at an organization provides a good reason for a visit. “I’m new to the organization and in the process of meeting with some of its closest friends, key supporters/constituents and community leaders.” Or if someone has joined the staff outside the development area, “I would like to introduce you to so and so who has recently joined the organization and is interested in having the opportunity to meet our friends and supporters.”

It is important to ensure that it is clearly understood that the purpose of the meeting is not to seek a donation. Given this assurance and a valid reason for a meeting most individuals will agree to a half-hour session. The other key is to book the meeting well in advance so that the person has no ‘wriggle room.’ Our approach is to identify wanting to meet in the next few weeks and letting them take the timing from there.

The Purpose of Meeting with Donors/Prospects is to:

1. Enhance the relationship between them and our organization
2. Find out more about the donor
 - What motivates their giving to our organization – is it values; or business or recognition?
 - Are there any particular passions they have in our organization that might attract their future support?
 - Do they make their own decisions about their giving or share it with their spouse/partner, family, others?
 - Are there individuals they are close to in our organization?
 - Are there any particular challenges/obstacles to the organization in securing their support?
 - Identify ways to enhance their relationship with our organization.

Our task in meeting with major gift prospects is to secure answers to the well known seven “rights” we want to know before soliciting a gift:

- “right” purpose for their gift
- “right” dollar amount
- “right” solicitors
- “right” time
- “right” place
- “right” participants
- “right” materials

Securing the knowledge to answer these questions usually takes place over a period of time through a variety of contacts.

Debra Ashton, author of *The Complete Guide to Planned Giving*, the keynote speaker in a presentation at a conference a few years ago, discussed how a fundamental part of her organization’s development program was for staff to meet with donors/prospects to discuss:

- their attitude and relationship with the organization; and
- what the organization could do that could lead to a closer relationship between it and the prospect.

Building from Debra’s experience we include in our discussion with top donors/prospects:

- Where the organization fits in their priorities for philanthropic giving?
- Is there anything that the organization could do to make it a higher priority?

Recognizing the demands that go with the position of CEO and therefore the importance of using their time judiciously the best person to have a one-on-one meeting with a top prospect is usually the head of the organization. Involving the organization’s top person/people in a meeting with a prospect at the appropriate time can, in many cases, help things move faster. In large organizations such as a post-secondary institution or hospital, etc., the head of the appropriate department/project in which the donor/prospect has an interest is also effective.

‘VIP’ Luncheon Meetings

One of the approaches we have found very effective with a number of our clients has been to initiate a series of ‘VIP’ luncheon meetings. These involve getting the CEO of the organization to block out a series of luncheon dates several weeks/months in advance. These times are then filled with meetings with donors/prospects by the major gifts staff. A letter is sent from the head of the organization to the prospect explaining that they would like to meet with the person as apart of a series of consultations they are initiating with key business and community leaders. The purpose of the meeting is not to ask for financial support. It is the major gift persons task to follow-up and arrange the meeting from the dates the CEO has made available. The more lead time you have the easier it is to arrange the appointments. In making the phone calls to arrange the meeting it is again made clear, if necessary, that the meeting is not to ask for financial support. Once a few of these meetings have taken place we have found it helpful to provide examples from among the donors/prospects peers of others who have participated in similar luncheons with the CEO.

The goal of the luncheon is to establish/enhance the rapport between the CEO of the organization and the prospect and to further develop an understanding of the donor/prospect and his/her views/relationship to the organization. Given this, the head of the organization and any others that might be involved in the meeting from within the organization need to clearly understand that the purpose of the meeting is to get the prospect to do as much of the talking as possible. Some CEO’s find this more challenging than others!

We have found the luncheon meetings to be a very effective method of acquainting or re-acquainting individuals with the CEO and the organization and identifying areas of shared interests from which to develop a closer relationship.

Some of the mechanics attached to these meetings include the following. Our preference is to have the meeting take place in the office of the head of the organization or a small meeting room. Simple but good food is served, i.e., sandwich and salad, refreshments and simple dessert. This is pre-ordered and ready when the guest arrives. (It is wise to check if there are any special dietary requirements). This helps to ensure a private uninterrupted meeting in a simple

informal style. The meeting is scheduled to last for 1.25 hours. The guest is aware of both the nature of the lunch and length of the meeting. We try to ensure that convenient parking is arranged. The head usually opens by giving an informal brief state of the organization presentation and seeks reaction and advice. A member of the development staff participates in the meeting and is responsible for the follow-up, notes, etc. Immediately following the luncheon a debriefing and plan for next steps then take place applying the 6 step moves management approach.

Reasons to Invite a Major Gift Donor/Prospect to Visit the Organization

- Breakfast/luncheon/dinner meeting with the CEO
- Tour of the facilities/coffee with the CEO
- Meeting with a special visitor to the organization
- Attend a special event – develop inventory/audit of activities which take place at the organization, add a special reception at the beginning or end, build on what you have first
- Meet with individuals involved in a project made possible/assisted through donors financial support
- Invite them to give a talk on their area of expertise
- Meet with students to discuss their personal careers, give career advice, talk about their particular industry – challenges and opportunities – particularly appropriate way to involve successful women
- One time meeting with a committee which needs advice in their particular area of expertise

Group Activities

Twenty-Four Hour Visits to the Organization

The activity singled out most often by educational organizations of all types were special visits to the campus. These involved inviting alumni and friends of the organization to the campus. Consistently universities, colleges and schools that had conducted these indicated that if they could only invest in one activity this would be it. As one of the individuals we spoke with stated, “We’ve seen a lot of people who came to one of these programs without any sort of idea what they did or didn’t feel about our institution. They left feeling good about it. That enables

us to do our job a lot better. It is the one activity I recommend to anyone who has the budget and personnel to put such a program together. It is a time intensive activity but on the other hand you get 20-25 people who experience the organization as opposed to visiting people in their office and telling them about what is going on in the institution.”

Dartmouth calls their program *Horizons*, The University of Utah, the *President's Seminar*, Cornell, *The Campus Visit Program*. The description Williams College sends to those invited to its *Presidential Colloquium* invited guests describes their program as follows is equally applicable to other such programs. “At every *Presidential Colloquium*, alumni and parent guests receive an intense and in-depth view of Williams. Visiting as guests of the College, they gather to join the President, faculty members and senior administrators in an examination of William's response to some of the more urgent issues facing higher education. The weekend is an occasion for a lively interchange of ideas, questions and comments among guests, faculty and administrators.”

Dartmouth College has been running such programs since 1962 having adapted the program from Princeton University. Cornell has been running four programs a year since 1979. One of the many benefits of the program is that because it is always new to those attending it can be replicated with little modification. As in many things in life getting the first one off and running is the challenge.

Following are some of the key elements to planning such programs:

- The head of the organization has a key role to play and is involved in giving an inspiring “state of the institution” presentation.
- This is an occasion to expose invitees to “the best and the brightest” of the organization. In educational organizations the programs are always scheduled in such a way that there is the opportunity for guests to meet with students.
- One of the constants between organizations was the fact that the acceptance rate to invitations was 25%, i.e., to have 20 individuals attend you need to send at least 80 invitations. This was the figure given by each of the organizations we spoke with.

- While some institutions have involved larger numbers generally groups are kept to 20-25 guests to ensure a sense of intimacy and connectedness. Active participation of each attendee is the goal.
- The program does not have a fundraising orientation; the focus is on familiarizing guests with the “state of the organization.”
- The program focuses on top prospects and or key “influencers”.
- Generally the program is not used as a reward system for donors but as a means of raising awareness and interest among potential prospects, individuals who often do not have a history of closeness to the organization. (Though some of the organizations do involve those that are close to being ready for an ask.)
- Invitations are sent 2-3 months in advance of the program. The programs usually take place over a 2 day period but some, as we shall discuss, are shorter but on the other hand some take place over a 3 day period. Meeting and interacting with the students and faculty is an important part of these events.
- There is nearly always a special dinner involving the head of the organization.
- After the event follow-up is critical, again the 6-step moves management process is applied as the appropriate next step(s) are identified for further contact to further develop the relationship. Guest can be invited to become volunteers, guest lecturers, advisory committee members, etc.
- You should not “water-down” your mix of prospects by involving individuals with different giving capacities.

Half-Day Seminars/Open Houses

Other organizations have developed half-day programs two or three times a year. They involved a luncheon or dinner, depending upon whether or not there was an appropriate scheduled evening event to tie into the dinner. A follow-up letter is sent from the CEO which thanks each attendee for their participation and that the organization will be in contact with them to discuss other non-financial involvement with the institution.

Tours of Facilities

Hospitals, educational institutions, arts and cultural organizations and social service organizations such as community centres and some others are fortunate in

having a lot they can show. They can arrange tours of their facilities appropriately customized to the interests of their donors/prospects. These can be structured as individual, small or large group tours. They are preceded or followed by presentations from the CEO and others discussing the vision and mission of the institution, its accomplishments and plans for the future. Discussion and questions are encouraged. Attendees are identified on the database and appropriate follow-up contacts initiated.

The time tours can take and their structure varies significantly between institutions. The one constant is that the tour ends with a meeting of the CEO. Ideally the CEO also welcomes the donor/prospect and indicates that he/she is looking forward to meeting with the donor/prospect following their tour. A tour of a science centre, for example, could take a day or longer. In this case we sought to tour an exhibit that our research indicated would be of greatest interest to the donor. The tour lasted about 30 minutes and was followed by lunch with the CEO.

In the case of a shelter for abused women and children, the tour only takes a half-hour since by its very nature there is a limited amount to see. However, the meeting that takes place to discuss the work of the shelter has an incredible impact. It would be the rare person who could leave the meeting without having been moved by what they have both seen and heard.

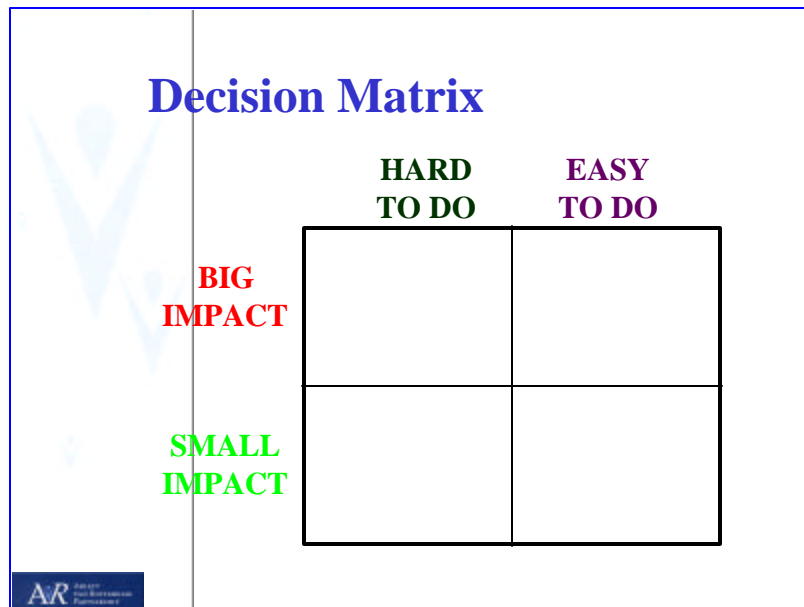
Some organizations feel they just don't have anything that merits touring. In these cases the donor participates in a half-hour meeting with a group of key members of the staff listening to brief reports or cases on the organization's activity. These are carefully scripted in advance to ensure that they are interesting, well presented and to the point. The CEO "chairs" the discussion after which the CEO and donor/prospect and major gift officer meet over lunch.

Reasons to Invite Prospect as Part of a Larger Group

Invitation to an event at the organization which could include:

- lecture
- performance
- to meet VIP guest
- reception
- group tour
- special dinner (on or off site)
- gallery opening
- arrival of special new equipment
- opening of additions to facilities
- building dedication
- awards ceremony
- annual meeting
- event tailored for leadership prospects (viewed as best approach by US educational organizations)

Applying the Decision Matrix



5. Other Considerations

The Role of Research

There are three ways we can obtain information on donors

1. Through publicly available materials
2. Through other people
3. Direct from the donor

One of the dangers we have seen is that some major gift staff use the ‘necessity’ of research as a continuing reason to delay meeting with donors/prospects. Experience has found that we don’t need a lot of research before trained knowledgeable staff go to meet with a top prospect – the best source of information is the prospect him/herself. For some individuals there can never be enough research and it becomes a great reason for procrastination. One of our colleagues reported that she learned this important lesson when all her research for an out-of-town trip for meetings with top prospects was accidentally left behind and she had to wing it!

Special Challenges to be Anticipated

- Suspicion of individuals that an invitation to an individual or group event is really an excuse to ask for a gift? The “no free lunch” syndrome. How can we address this before the fact?
- Ensuring that group events are truly welcoming
- Providing seamless service to donors
- Staying abreast of involvement opportunities in larger institutions, e.g., colleges and universities; hospitals

Volunteer Involvement

- One of the significant changes from the past is that increasingly staff are involved in meeting and soliciting major gift donors/prospects. There are still situations where the relationship, profile, influence of a volunteer to a donor/prospect is such that their involvement can bring/add to the success of such meetings.
- Some charities do not have a relationship with their donors that will see these individuals welcoming a cold call from a professional fundraiser. Volunteers

can play an important role in opening the door even in cases where they do not know the person.

- If we can train volunteers and secure their productive involvement in major gift work it means that staff can handle that many more major gift prospects.
- David Dunlop and Buck Smith, two US gurus of educational fundraising, speak of identifying those individuals who are already the “natural partners” in a prospect’s/donor’s relationship with the charitable organization. Dunlop states, “Nurturing fundraising focuses not on assigning or volunteering responsibility for cultivating a prospect, but on discovering through whom the prospect relates to the institution.” He explains that among staff (not with the volunteers) the natural partners best positioned to help develop major gift relationships are identified as primes. Other individuals willing to help develop the relationship are termed secondaries. “Primes and secondaries are individuals who can, through their own personal contacts, strengthen the bond between a prospect and an individual.”

Many organizations will not have the luxury of such relationships and will need to find individuals who are comfortable working with staff to develop relationships with donors/prospects based on their shared interest in and support of the charitable organization.

Readings

Penelope Burk, *Thanks: A Guide to Donor-Centred Fundraising* Burlington: 2000 by Burk & Associates Ltd. (email: jd.burk.assoc.ltd.@sympatico.ca).

Ken Burnett, *Relationship Fundraising*, London: 1992 by The White Lion Press Limited.

Ken Burnett, *Friends for Life: Relationship Fundraising in Practice* London: 1996 by The White Lion Press Limited (also available through Jossey Bass).

Roy Muir and Jerry May *Developing an Effective Major Gift Program: from Managing Staff to Soliciting Gifts*, Washington DC: 1993 by the Council for Advancement and Support of Education.

APPENDIX 1 – Potential Cultivation Opportunities

Activity	Personal	Group	Month											
			Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
1. Publications	X	X												
2. Newsletters		X												
3. Journals	X	X												
4. Books	X	X												
5. Special booklets	X	X												
6. Papers	X	X												
7. Annual report	X	X												
8. Other publications	X	X												
9. Receptions	X	X												
10. Special dinners/luncheons	X	X												
11. Special lectures/seminars	X	X												
12. Meeting visiting guests VIP's	X	X												
13. Award ceremonies	X	X												
14. Openings	X	X												
15. New equipment demonstration	X	X												
16. Receptions to welcome/thank new/retiring staff	X	X												

17. Special meetings/task forces	X	X												
18. Demonstrations of new equipment	X	X												
19. Departmental activities/events	X	X												
20. Volunteer activities	X	X												
21. Tour of facilities	X	X												
22. Regional meetings	X	X												
23. Guest at special events	X	X												
24. Open house	X	X												
25. Privileged phone line	X													
26. Access to privileged information	X													
27. Other activities														