

An Expository Discourse: Why Cultivating Major Gifts is a Full Contact Team Sport

When philanthropist Alonzo L. McDonald, Jr. began generously giving away his fortune to what he deems as “a *selected group of distinguished Universities and within them their most influential faculty members*”¹, I am certain many were eager to see which academic institutions made the McDonald Agape Foundation’s short list. Normally, when an organization or an institution receives a major gift from a donor, the internal response is usually one of elation. Receiving a major gift significantly impacts the organizational mission and also influences the strategic development planning and execution that are inherent to the major gift solicitation process. A successful major gift solicitation is a “full contact” team sport that requires all hands on deck. Therefore, I believe that building donor relationships throughout the four critical stages of the major gift cycle is essential for a successful solicitation and requires the full participation of all development team members.

Universally, development professionals acknowledge that there are four primary stages in a major gift solicitation cycle; I categorize them as the following action verbs (1) identify (2) cultivate (3) solicit, and (3) steward. Throughout each of these stages, there are numerous opportunities for cross pollination from the annual giving, gift planning, alumni/donor relations and major gifts teams. Teamwork ensures that there is consistent open communication between all teams such that everyone understands which “asks” are already in the pipeline and which ones are likely to be fulfilled². Joint team efforts ensure that donor messaging is consistent across the donor pipeline and that donors are cared for across the four stages of solicitation.

An efficient donor pipeline is simultaneously managed by several teams within the development division. In general, most development teams warehouse and manage donor information via databases. Analysis of donor information influences major gift donor solicitation strategy and shapes the overall donor messaging. For example, when donor information is sorted by zip codes, teams can delineate prospective major gift donors by perceived wealth or income levels. By using donor tracking software, teams can determine the donors’ preferences such as areas of interests, preferential form of payment (e.g. online, check, wire), time of year gifts are made and messaging style. Of course with historical giving trends data, the major gift team can identify annual giving donors who have increased giving over time and who may be ready for deeper levels of engagement and organizational involvement. The annual giving team is essential to the identification of prospects, who may be cultivated for a major gift solicitation at some point in the future.

Upon successfully identifying donors for major gifts, the cultivation stage ensues and is critical to the entire lifecycle of building donor relationships buttressed by integrity. Donor cultivation is a highly personalized process in which the major gift team “gets to know” the prospect. During this stage, the prospect becomes a “friend” of the organization. There is a strong correlation between level of involvement and level of

¹ http://www.mcdonaldagape.org/McDonald_Agape_Purpose.html

² Building a Major Gifts Program from the Ground Up (Blackbaud Tip Sheet by Kristen Fulks, November 2009).

giving.³ By cultivating the relationship, the donor interests are identified and the development team finds opportunities to integrate the donor into mission-based activities that closely align with his/her interests. The cultivation stage intrinsically builds a trusting relationship with the donor whereby the team listens and responds intently to the donor's feedback. Individualized donor strategies begin to formulate as well as stage-based donor tracking. There is a learning curve for both the prospect and solicitor during the cultivation stage. If the donor relationship is to be a stalwart long term connection, the team must take the time establishing the rapport necessary for a major gift solicitation.

The major gift solicitation is not a one time culminating conversation, instead it is a series of strategic presentations and informative discussions leading to the moment whereby the donor has been sufficiently primed and the team is equally as prepared. The solicitation moment must consider a total analysis of donor information gathered thus far including donor preferences, interests, historical giving trends, and donor-gift potential. Understanding all the individual donor information coupled with a specific strategy prevents the major gift team from giving a Mark Zuckerberg type presentation to a Warren Buffet type donor...indeed both are capable of giving a major gift but each solicitation needs to be highly customized to the individual donor's needs.

The final and arguably the most pertinent stage of major donor cycle is the stewardship process that occurs post-gift commitment. Donor stewardship is absolutely critical to the ongoing giving continuum. "Donor stewardship is not just about providing reports and thanks for the gift, [instead] it should be seen as preparation for the next ask."⁴ This notion of ongoing donor pipeline incubation and management is key for sustainable major gifts that support the organizational mission. Stewardship is the responsibility of not only the donor/alumni relations teams but also the annual giving, major gift giving teams as well as senior leaders. Each major gift donor is unique and must be treated with respect and attention such that they continue to stay interested as the organization grows. "Mr. McDonald is a dean's best daydream and worst nightmare: the generous giver who wants to stay involved. He likes to meet the recipients of his family's largess – but who can blame him?"⁵ Alonzo McDonald, who has given major gifts to divinity school at Duke, Harvard and Yale, is stewarded differently based upon the priorities and culture at each of these academic institutions. Major gift donors are like rare coins – you want to hold on to them when you finally get one! The stewardship stage is where the team fully commits to have those donors in their pipeline in perpetuity.

In summary, the nature of any full contact team sport is that everyone is fully vested in the processes and outcome. The best strategies are devised because diverse groups of professionals are willing to collaborate on ideas to actualize their organization's mission. The same is true for major gift teams who engage other development teams in their planning, execution and follow through processes. An "all hands on deck" team based approach at each of the four stages of the donor solicitation cycle will yield long term and sustainable fundraising results; not to mention that teamwork always presents incredible learning opportunities for all who fully participate.

³ Development Dialogues Webinar: Using Annual Giving to Drive Major Gifts; Chris Kasavich, Baylor College of Medicine, (2011)

⁴ Ibid.

⁵ http://www.nytimes.com/2010/07/17/us/17beliefs.html?_r=1