Building Block 4

Prospect
Research, Tracking and Management
Systems Support
What You Will Learn in This Unit

• How to manage prospect identification, research, tracking and management to ensure accuracy, utility and effectiveness in supporting the major giving initiative;

• New appreciation for the wealth of information and prospects that already exist in your data base and techniques for using member and donor information more effectively so donors have a more satisfying experience that will lead to increased long term investment;

• Roles board members and other volunteers can play in identifying prospects;

• More about the variety of electronic prospect screening options available and the advantages and/or disadvantages of using such systems
Implementation Assignment Review from BB#3

• Open-ended assignment to check each station’s status
• What we found out
• Comments from the MGI Team about maintaining the momentum in case, board and staff development while getting your major gifts development underway
Introduction to Session: Five Key Principles

1. Accuracy in data gathering and management is essential: it is critical in the maintenance and growth of good relationships.

2. No department or program “owns” a donor or donor list: good prospect management is based on looking at the best way to fulfill a donor’s interests by linking them with an opportunity in your station. Cooperation is critical, and willingness to move a member or donor from one program to the other is the key to success.
Introduction to Session: Five Key Principles (continued)

3. No matter how much prospect research you have on a donor, you still need personal contact, relationship building and verification of information (engage volunteers in this).

4. Ultimately, the process of developing a donor pivots on uncovering shared values, engaging people in your vision and exciting them about your mission.

5. Prospects must have connection and concern as well as capacity: make sure you are verifying all three.
Guest Presenter

Abbey Silberman
American University
Washington, DC
Before We Start

- There is no limit to the data and knowledge you can acquire from it. This discussion may become granular and impersonal.
- Do not be distracted from your core focus by the allure of information.
- No matter what, do the best with what you have. *The best you have is relationship data.*
  - Giving, membership, patterns, involvement
- **Remember** it always comes back to relationship and message.
- There is something here for everyone.
Information Practices

• Create an ethical framework.
  • Obtain information legally  
  • Disclose your identity in doing so  
  • Protect data vigorously (databases, papers, personnel)  
  • Use it wisely and with discretion  
  • Use it for its intended purpose  

• Resources: APRA Ethics Statement (www.aprahome.org), AFP (afpnet.org), Donor Bill of Rights (aafrc.org)
Some Terms

- **Rating** – a measurement, usually a code that indicates a scale of financial capability or readiness.
- **Segment** – one of many “slices and dices” – selections you make that determine the *who* in the *what*, *when*, *why*.
- **Stage codes** – a measurement, usually a code, that indicates likelihood or timeline for a prospect to make a major gift.
- **Appending data** – adding new types of information to your database in specific new fields that will display and can be selected.
Information Landscape

- Information from many sources contributes to ongoing operations, future planning, and strategy development.
- Two perspectives:
  - **Micro**: individuals and major gifts
  - **Macro**: larger segments for membership and direct marketing
- Some data is *not-negotiable*, others are optional and scalable.
- You should be able to proceed in some measure on what you are able to do well.
The End Game: How We Use It

• Segmentation Strategies:
  • Whom to Ask
  • How to Ask (mail, call, personal, event)
  • For How Much to Ask
  • What/How to Communicate
  • Where to Invite
  • How to Thank
  • Who is Responsible
Focus: Major Gifts

- **Individual Prospect Strategies:**
  - Ultimate dollar and involvement objectives
  - Objectives for next 12 months
  - Most relevant background points
  - Key partners
  - Next 3 action steps, detailing for each:
    - What, when, whom, how
  - *The greater challenge is thinking this through.*
  - You need nothing more than what you have to do this, but the more you have, the better it will be.
  - You should be able to articulate strategies on at least your top 10-20 major donor prospects.
Key Collateral Materials

- *Forms and format are less important than capturing data that can be measured and acted upon.*
- **Written strategy**
  - Rating
  - Interest Codes
  - Prospect Manager Assignments
  - Key Volunteer Assignments
  - Last/Next Actions
  - Stage codes, or timing, readiness, inclination
- **Visit Briefings** (for Station Managers or Key Volunteers)
- **Call Reports** (resulting from any contact)
Prospect Strategy Example

Name: John B. Stone        ID #41568

Strategy: By the end of the current campaign, ask JBS to endow the public affairs fund for $1 million and nominate to BOT.

Next 12 months: Increase annual gift to $10K, ask to host event for the P.A. fund.

Relevant points: Family owns local newspaper, has been regular donor and member for 15 years.

Next steps: Lunch w/SM 3/31/05; station tour on 5/1/05; event @ home on 7/1/05; solicit by 9/05.
Defining Core Data

- *The basic, essential, defining data about a donor/prospect:*
  - Name, address, telephone
  - Date of acquisition
  - Gift designation, date, amount, payment type
  - Membership dates, types
  - Volunteer and other involvement
  - Internal responsibility and assignment
Ideal Core Data

- This is all data that typically may be requested and supplied in standard membership interaction.
- **You will need to ask in order to have any chance of getting it. Don’t be shy.**
  - Name – the full, *formal name*, including initial
  - Spouse/partner name
  - Business title, address, phone
  - Occupation/industry affiliation
  - Email address
  - Date of birth
  - Areas of interest in the station
Relationship Data

- Includes most core data, and:
  - What has the donor told us?
    - During cultivation visits
    - In calls, letters, emails
    - To and about other volunteers
- Extensive engagement and giving background.
  - How many gifts, how long a donor
  - Type of gift (stock, cash, credit card, from donor advised fund)
  - Response mechanisms
Define External Data

• *Anything* that is relevant to the construction of strategies.

• Relevant because it qualifies:
  • Financial Capacity
  • General Philanthropic Interests
  • Who Knows Whom
  • Talking Points – how to engage
  • General Demographics
Techniques: Macro

- **Data Cleanse** – using various methods like NCOA and matching against SSDI, helps you determine the value and quality of addresses and phone numbers.
  - Good annual, if not quarterly, investment.
- **Demographic Overlay** – *appends* what is either household or zip-code level data about the constituent.
  - Age, date of birth, presence of children, length of residence, hobbies, interests, consumer spending habits, value of home, income, mail responsiveness
- **Priced** by number of records input and number of elements appended. Could be as little as $5-10/M for some elements with minimums of $500.
Some Overlay Vendors

• Equifax (www.equifax.com)
• Donnelley Marketing (www.donnelleymarketing.com)
• Experian (www.experian.com)
• Larkspur Data (www.larkspurdata.com)
• Your direct mail vendor
• Your telethon vendor
• Any screening company (see next)
Techniques: Move to Micro

• **Electronic Screening** – uses various approaches to identify and qualify prospects. Different from overlay in *your objectives*.

• **Types of Electronic Screening:**
  • Asset and Research Screen
  • Behavioral Model
  • Predictive Model

• **Priced** by services and number of records input.
Electronic Screening

• Asset Screening
  • Real estate, stock, private company data
  • Essential for major gifts qualification.

• Research
  • Gifts to other institutions, educational background, foundations, political gifts

• Behavioral
  • Data Mining so that you don’t have to – modeling the past giving and involvement internally
  • You can do your own version of this with selections on consistency and dollar value of giving.

• Predictive
  • Either based on your major donors or all major donors, determining those with greatest likelihood to give based on regression or “look alike” models.
Screening Applications

- Rate, rank and qualify prospects by
  - Capacity
  - Readiness
  - Inclination
- Build strategies with detailed information on interests, business activities, philanthropy
- Most have software interfaces that allow for complex queries and reports.
Alpha List of Some Vendors

- Blackbaud Analytics (www.blackbaud.com)
- Grenzebach Glier & Company (www.grenzebachglier)
- MAGIC (www.majorgifts.net)
- P!N (www.prospectinfo.com)
- Target America (www.tgtam.com)
- WealthEngine (www.wealthengine.com)
- WealthID (www.wealthid.com)
Consider Before You Screen

- Determine the range of output upon which you can act in the next 24 months to **prevent over-buying**.
- Focus on information that is **relevant** to you. More information may be interesting, but may not lead to a gift.
- **All screening has a margin of error.** Some are more reliable than others. You may need internal fact-checkers.
- Regardless, the next step will **always be** your qualifying the results by engaging the donor.
- Bells and whistles are fun, but **client service** is more important. Service is about technology, but also implementation.
Call In

Participants are Invited to Call In and Ask Questions or Provide Their Own Comments

(Press * star key on your telephone to signal you have a question)
Approaches to Whole List

- **Step I:** Data Cleanse
- **Step II:** Demographic Overlay
- **Step III:** Predictive or Behavioral Model
- **Step IV:** Isolate Best Prospects
- **Step V:** Asset and Research Screens

**Result:** At each step, moving up the donor pyramid to qualify, isolate, segment.
Prospect Research

- The apex and the on-ramp to learning more about your prospects.
- Combines best of external with best of internal data.
- In-depth, focused research on individual prospects to synthesize, and interpret information about the prospect.
- Occurs over time, or in single “events” or products called Prospect Profiles.
Prospect Research

- May be done with free Internet or library-based resources.
- Online databases and fee-based services enhance efficiency and quality.
  - LexisNexis, Dialog, Factiva, Prospect Research Online
  - Flat monthly fees and pay as you go options.
  - A Quick exploration that complements your *Fundamentals of Research Guide* follows.
- Start with learning a little more about the 10 prospects who constitute your best opportunities now.
- Ethical considerations with our example.
Use quotes and +/- operator for better precision.
Arthur Blank Family Foundation
Supporting programs and organizations that create opportunity, enhance self-esteem and increase awareness about cultural and community issues among young...
www.blankfoundation.org - 9k - Cached - Similar pages

The Arthur M. Blank Family Foundation
... Ms. McPhail joins The Arthur M. Blank Family Foundation from the John S. and James L. Knight Foundation in Miami, where she was Vice President and Chief...
www.blankfoundation.org/news-release-15.html - 14k - Cached - Similar pages
[ More results from www.blankfoundation.org ]

Babson College - Entrepreneurship
... The Arthur M. Blank Center for Entrepreneurship serves as the nucleus for the... LLC; and chairman of the Arthur M. Blank Family Foundation. ...
www2.babson.edu/eshif/publications/casedatabase/ - 56k - Cached - Similar pages

Teaching Cases
... and executive levels are further supported by the many teaching cases written by the faculty members of the Arthur M. Blank Center for Entrepreneurship...

Stories of Entrepreneurs, Arthur M. Blank
Story of Arthur M. Blank of Home Depot, ... Biography of Arthur M. Blank: Arthur Blank was born in Queens, New York in 1942 and with his parents and brother...
www.zeromillion.com/entre/stories/arthur-blank.html - 39k - Cached - Similar pages

The Arthur M. Blank Family Foundation Awards Grants to Support...
... The Arthur M. Blank Family Foundation today announced it is awarding grants. ... Arthur M. Blank is owner & CEO of the Atlanta Falcons and Georgia Force. ... biz.yahoo.com/finnews/050128/c0006_1.html - 11k - Cached - Similar pages

The Arthur M. Blank Family Foundation will give $4.6 million in...
... The Arthur M. Blank Family Foundation announced its Environmental Initiative in late 2001 and began accepting letters of intent for projects in early...

Penelope McPhail named president of The Arthur M. Blank Family...
American City Business Journals Inc. is the nation's largest publisher of metropolitan business newspapers, serving 41 of the country's most vibrant markets...
atlanta.bizjournals.com/atlanta/stories/2004/02/02/daily36.html - 77k - Cached - Similar pages

Hall of Fame 2002
Note that he had a foundation...
Form 990-PF

Department of the Treasury
Internal Revenue Service

Return of Private Foundation

Note: The organization may be able to use a copy of this return to satisfy state reporting requirements.

For calendar year 2002, or tax year beginning 2002, and ending 2002.

**Part I: Analysis of Revenue and Expenses**

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<th>(a) Revenue and expenses per books</th>
<th>(b) Net investment income</th>
<th>(c) Adjusted net income</th>
<th>(d) Disbursements for charitable purposes (cash basis only)</th>
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<td>Checks</td>
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<td>Distributions from split-interest trusts</td>
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**Name of organization**

THE ARTHUR M. BLANK FAMILY FOUNDATION

**Number and street (or P.O. box number if mail is not delivered to street address)**

3290 NORTHSIDE PARKWAY

**City or town, state, and ZIP code**

ATLANTA, GA 30327

**Employer Identification number**

50-6292769

**Telephone number (see page 10 of the instructions)**

(404) 442-1072

**Fair market value of all assets at end of year (from Part II, col. (c), line 16)**

3,364,141
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<th>TITLE AND TIME DEVOTED TO POSITION</th>
<th>COMPENSATION</th>
<th>CONTRIBUTIONS TO EMPLOYEE BENEFIT PLANS</th>
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Arthur M. Blank Family Foundation
Charitable Contributions
December 31, 2002

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Anything here translate to your programs and priorities?
Contributions from individuals whose name begins with [blank, arthur m]

21 records found in the 2004 database.

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Anything here translate to your programs and priorities?
EDGAR Online People searches SEC Filings by a person's name or displays all people associated with a specific company name.

**Search:**
- Last Name: blank
- First Name: Arthur
- Ticker: (optional: Refine search by ticker or search ticker only for All People)
- Company Name: (optional: Refine search by Company Name or search Company Name only for All People)
- Form Type: Proxy Statements (DEF 14A)

Become a Premium Subscriber to search all filings by individual name, get email alerts on new filings and more. Visitors can search Proxy filings only using EDGAR Online People.

**EDGAR Online People** is Indexed by NetOwl Extractor

Please note: EDGAR Online, Inc. is not responsible for the accuracy of any search. In
## Search Results

The following list of **Proxy Statements (DEF 14A)** match your search criteria.

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Welcome, fenkey [Sign Out]

Welcome, fenkey [Sign Out, My Account]

Services
Bill Pay, Funds Transfer, PayDirect

Accounts [add: bank, credit cards]

Portfolios [manage, create, add: brokerage, 401(k), mutual fund]

Quotes - ME | FREE trial of Streaming Real-Time Quotes, Charts, and Screener

Yahoo! Finance

Enter symbol(s), e.g. YHOO, ^DJI | hd

Are the Jones' really better off than you?

Yahoo! Credit Manager

Taxes on Yahoo! Finance

7 Tax Return Screw-Ups to Avoid

SmartMoney.com

After Dec. 31, there's nothing you can do to affect your taxes for the year that just passed, right? Not so. There are countless things you can do before you file to screw up your return...
## BLANK, ARTHUR A.: Declared Holdings

<table>
<thead>
<tr>
<th>Company/Relationship</th>
<th>Reported</th>
<th>Shares</th>
<th>Ownership</th>
</tr>
</thead>
<tbody>
<tr>
<td>STAPLES INC Director</td>
<td>28-Dec-04</td>
<td>34500</td>
<td>Direct</td>
</tr>
</tbody>
</table>

### Insider & restricted shareholder transactions reported over the last two years

<table>
<thead>
<tr>
<th>Date</th>
<th>Shares</th>
<th>Stock</th>
<th>Transaction</th>
</tr>
</thead>
<tbody>
<tr>
<td>28-Dec-04</td>
<td>20,000</td>
<td>SPLS</td>
<td>Purchase at $33.1285 - $33.35 per share. (Cost of about $663,000)</td>
</tr>
<tr>
<td>22-Dec-04</td>
<td>10,000</td>
<td>SPLS</td>
<td>Purchase at $33.4368 per share. (Cost of $334,368)</td>
</tr>
<tr>
<td>9-Dec-04</td>
<td>400</td>
<td>SPLS</td>
<td>Acquisition (Non Open Market) at $0 per share.</td>
</tr>
<tr>
<td>10-Sep-04</td>
<td>400</td>
<td>SPLS</td>
<td>Acquisition (Non Open Market) at $0 per share.</td>
</tr>
<tr>
<td>23-Jun-04</td>
<td>1,600</td>
<td>SPLS</td>
<td>Acquisition (Non Open Market) at $0 per share.</td>
</tr>
</tbody>
</table>
Everything so far has been free.
LexisNexis
First fee-based search

LENGTH: 110 words

*********** PERSONAL INFORMATION ***********

GENDER Male
BIRTH-DATE 1942 [complete date unavailable]
BIRTHPLACE Queens, NY
ADDRESS Office, Atlanta Falcons, 4400 Falcon Pkwy, Flowery Branch, GA, 30542

*********** CAREER INFORMATION ***********

OCCUPATION 8350 - professional sports team executive; 5910 - retired home and lumber retail chain executive


LANGUAGE: ENGLISH

LOAD-DATE: February 19, 2004
Asset Locator Results for: blank, arthur

Sort by: Date Relevance

1. BLANK, ARTHUR, 3639 TUXEDO RD, ATLANTA, GA 30305, 5/18/1993, Fulton North County, Georgia, GASALE BLANK, ARTHUR

2. BLANK, ARTHUR M, 3639 TUXEDO RD, ATLANTA, GA, 30305, 2/12/2002, 31848/307, NON-PURCHASE MONEY, FULTON COUNTY, GA, MORTGAGE RECORD, GAMORT

3. BLANK ARTHUR M; Owner Occupied, TUXEDO RD, Fulton County, Georgia, GAPROP

Documents 1 - 3 of 3
**THIS DATA IS FOR INFORMATION PURPOSES ONLY**

**PROPERTY RECORD FOR FULTON COUNTY, GA**

**ESTIMATED ROLL CERTIFICATION DATE JULY 1, 2002**

**Owner:** BLANK ARTHUR M; Owner Occupied

**Mailing Address:** 3639 TUXEDO RD, ATLANTA, GA 30305

**Property Address:** TUXEDO RD

*************** **ASSESSMENT INFORMATION** ***************

**Assessor’s Parcel Number:** 17-0141-LL-159

**Legal Description:** CITY: ATLANTA

**Market Value Year:** 2002

**Market Land Value:** $1,012,500

**Market Improvement Value:** $1,507,000

**Total Market Value:** $2,519,500
General News Results for: arthur m. blank

Sort by: Date Relevance

1. The Atlanta Journal-Constitution, March 23, 2004 Tuesday, Home Edition, Pg. 1D, 737 words, Mcra feeling no threat, JEFF SCHULTZ ... BILL' WALSH (74%); ARTHUR M BLANK (67%); MICHAEL VICK ( ...

2. Marketing News TM, March 15, 2004, NAMES IN THE NEWS; Pg. 56, 411 words, Names in the news ARTHUR M BLANK (74%);

3. The New York Times, March 14, 2004, Sunday, Late Edition - Final, Section 3; Page 1; Column 5; Money and Business/Financial Desk, 2908 words, The Man Behind Grasso’s Payday, By LANDON THOMAS Jr. ... friends with Bernard Marcus and Arthur M. Blank, the other co-founders of the ...

4. United Press International, March 11, 2004 Thursday, 760 words, Entrepreneurs need moms; By T.K. MALOY, WASHINGTON, March 11 (UPI) ... MARY MAZZIO (75%); ARTHUR M BLANK (71%);

5. Grand Forks Herald, March 10, 2004 Wednesday, LOC, 446 words, LEADERSHIP: Knight Foundation picks Maidenberg for vice president; Former Herald publisher to take on new role in Miami, By Lisa Davis; Herald Staff Writer ... McPhee, was named president of the Arthur M. Blank Foundation in Atlanta ...
MIKE MAIDENBERG (96%); ARTHUR M BLANK (50%);

6. Aschenbrenner, March 9, 2004 Tuesday, 543 words, Mike Maidenberg Named Vice President, Chief Program Officer at Knight Foundation ... years to become president of the Arthur M. Blank Family Foundation in ...
MICHAEL MAIDENBERG (96%); ARTHUR M BLANK (55%); HODDING CARTER...

7. The Atlanta Journal-Constitution, March 9, 2004 Tuesday, Home Edition, Pg. 2C;, 598 words, Blank takes market initiative, TIM TUCKER ARTHUR M BLANK (74%);

8. The Atlanta Journal-Constitution, March 8, 2004 Monday, Home Edition, Pg. 3E, 749 words, Blank unwilling to give up fight for more parks, MARIA SAPORTA ARTHUR M BLANK (74%); SYLVESTRE FRANKLIN /
Const.ID: blank
Client Name: Arthur M. Blank
Home:
Business:

Affiliation:

Select Level: ADD
Insider Name: Arthur M. Blank
Insider ID: 15027545
Insider Addresses:
3290 Northside Pkwy NW Ste 600 (3/19/2004)
Atlanta, GA 30327-2211
4401 Northside Pkwy NW Ste 800 (2/3/2003)
Atlanta, GA 30327-5093.

Financial Summary:
Total Companies Selected: 3
Total Market Value: $1,220,222,323.47
Direct Value: $1,155,661,434.42
Indirect Value: $54,540,884.05
Total Stock Sales: $79,363,152.00
Total Options - Net value: $47,790.00
Vested: 10,000.00
Non Vested: 21,000.00
Net Value: ($25,680.00)
Net Value: $47,790.00
Next Expiration Date: 12/31/2009

Giving:
Largest: Cum:
Last: Date Last:

User Defined:
Insider Trading by Company:

<table>
<thead>
<tr>
<th>Company</th>
<th>Trans Report</th>
<th>Trans Date</th>
<th>Position</th>
<th>Trans Type</th>
<th>Number</th>
<th>Type/Own</th>
<th>Div</th>
<th>Gift/Inher</th>
<th>Split Adj.</th>
<th>Price</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>POST PROPERTIES INC</td>
<td></td>
<td>12/29/2000</td>
<td>Chairman of the Board</td>
<td>O</td>
<td>47,295</td>
<td>I</td>
<td></td>
<td></td>
<td>33,572,005</td>
<td>$36.21</td>
<td>$1,219,263,301.05</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Chief Executive Officer</td>
<td>8</td>
<td>34,610</td>
<td>I</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Officer</td>
<td>6</td>
<td>31,889,000</td>
<td>D</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Officer and Director</td>
<td>8</td>
<td>1,700,500</td>
<td>D</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>STAPLES INC</td>
<td></td>
<td>1/2/2002</td>
<td>Chairman of the Board</td>
<td>8</td>
<td>21,291</td>
<td>D</td>
<td></td>
<td></td>
<td>31,281</td>
<td>$29.62</td>
<td>$901,819.42</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Chief Executive Officer</td>
<td>8</td>
<td>2,400</td>
<td>D</td>
<td></td>
<td></td>
<td>2,400</td>
<td>$23.36</td>
<td>$57,004.00</td>
</tr>
</tbody>
</table>

Proposed Sales of Restricted Stock:

<table>
<thead>
<tr>
<th>Company</th>
<th>Trans Report</th>
<th>Proposed Date</th>
<th>Position</th>
<th>Net Acq</th>
<th>Proposed Number</th>
<th>Market Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>HOME DEPOT INC</td>
<td></td>
<td>6/21/2001</td>
<td>Trustee</td>
<td>GIFT</td>
<td>52,000</td>
<td>$2,563,000.00</td>
</tr>
</tbody>
</table>

Comment: Add
Other Free Sites to Note

• Links from the University of Virginia (great for Real Estate)
  • Indorgs.virginia.edu/portico
• Foundation Finder
  • lnp.fdncenter.org/finder.html
• Martindale-Hubbell
  • www.martindale.com
The Research Outcome

• Have you used this information to outline:
  • Connection
  • Concern
  • Capacity
    • Rate prospect Major Donor Capability: Working principle – 5% of net worth
    • Presumes payout over 3-5 years
    • Most important: Rate in line with your gift scale or realistic opportunities you have for major donors.
Back to Strategy

- Are you able to write a better strategy?
  - Ultimate goal
  - 12 Month objectives
  - Key background points
  - Partners in cultivation
  - Next actions

- Are you out the door to see the prospect and move the relationship forward?
Call In

Participants are Invited to Call In and Ask Questions or Provide Their Own Comments

(Press * star key on your telephone to signal you have a question)
Building Block #4 Implementation Assignment

• Next session April 14 is on cultivation, solicitation and stewardship. In preparation for that session, please identify a top prospect for a major gift (not a major membership gift, but a major gift that is unrestricted or for a certain local program or outreach).
Building Block #4
Implementation Assignment - 2

• Drawing on this session and your own resources, prepare a preliminary solicitation plan for that prospect, identifying what you will need to do in the following areas, who will help, and what the timeline is:
  • What further research is needed and how will you accomplish it?
Building Block #4
Implementation Assignment - 3

• What aspect of your case will be particularly compelling to this prospect? (Write something using the case as a trial run.)
• Who are the volunteers you will involve in cultivation, asking and stewardship of this donor?
• What events, tours, lunches, etc., will you plan for this person?
• Who do you think would be the best asker?
  • A planning worksheet is posted on the website
  • Please submit assignment by April 11 – Thanks!
Building Block #4

Major Giving Initiative