

# A Day in the Life of a Major Gift Officer

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**NDOA Essentials of Fundraising  
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# Who we are

- Rebecca Zanatta
- Scott Garrepy

# What we want to cover today

- Elements of typical major gift officer's typical day
- Practical tips for honing your major gift fundraising skills

# Who is in the room?

- What are you interested in **learning** today?
- What are your **challenges** with major gifts?

# Spending your day

- Prospect Management
- Research & Planning
- Cultivation: calls, visits, notes, emails
- Solicitation: calls & visits
- Contact Reports
- Stewardship
- Networking and skill building

# Prospect management

- Tracking
- Prioritizing
- Documenting
- CRM
  - Raiser's Edge, DonorPerfect
  - Web-based – Salesforce.com
  - Excel, Filemaker
- There is no perfect solution – whatever works for you and your organization

# Research & planning

- Do your homework
  - Google
  - Linked-In, Facebook, Twitter
  - Wealth Screen Services
- Create a plan but be willing to deviate

# Determine strategy: LIA

- Does the individual have a **link** to your organization?
- Does the individual have a commitment or **interest** to your organization?
- Does the individual have the **ability** to make a substantial gift to your organization?
- What are the engagement options and what are the possible paths to get them there?

# Calls: where do I start?

- Who do I call?
  - Current annual donors
  - Volunteers
  - Event attendees
  - Major gift donors for stewardship
- When do I call?
- What do I say?

# Timing the call

- Late afternoon, end of day – phone
  - People are relaxed, no competing activities such as meetings, emails, etc.
  - **5:30 p.m.** is a good time to call
- Day of week
  - **Fridays between 5-8 p.m.** - people are happy, alone, and tired
  - Never call people you don't know on Mondays (they're in bad moods)

# Making the call

- Be **present** and in the moment
- Do not call new people if you are having a bad day
- Be aware of yourself physically – when people are nervous, the blood leaves the mouth and tongue first (this explains why you get a dry mouth when trying to talk on the phone)

# Key calling points

- Know what you want to achieve with the call
- Script the call -- bullets
- Ask for something you want and something easy
- Ask open ended questions
- There are only 6 words that can start an open-ended question: who, what, where, when, how and why
  - Do not use “when” because it’s too open.

# Cultivation

- Cultivation is what makes solicitation possible and sets the stage for easy and successful asks.
- Cultivation involves Board, Staff and Volunteers
- Cultivation is **strategic**
  - General – regularly scheduled events
  - Specific – special engagements
- Cultivation is **systematic**
  - Every event should have follow-up
  - Plan follow up before the event

# Cultivation

- Cultivation is **coordinated**
  - Have one central person driving activity
- Cultivation is not limited to large gift prospects
- Make sure there is budget for cultivation
- NOT all cultivation is personal interaction
  - Impact and Results vs. Needs
  - Balanced information (volunteer, donor, program impact) vs. Special Events
  - Engage them through words, photos and video

# Using Video for Cultivation

- YouTube
- Easy to share with your donor
- Easy for them to share with their friends
- Informal and real
- Tangible evidence of their impact
- Demo

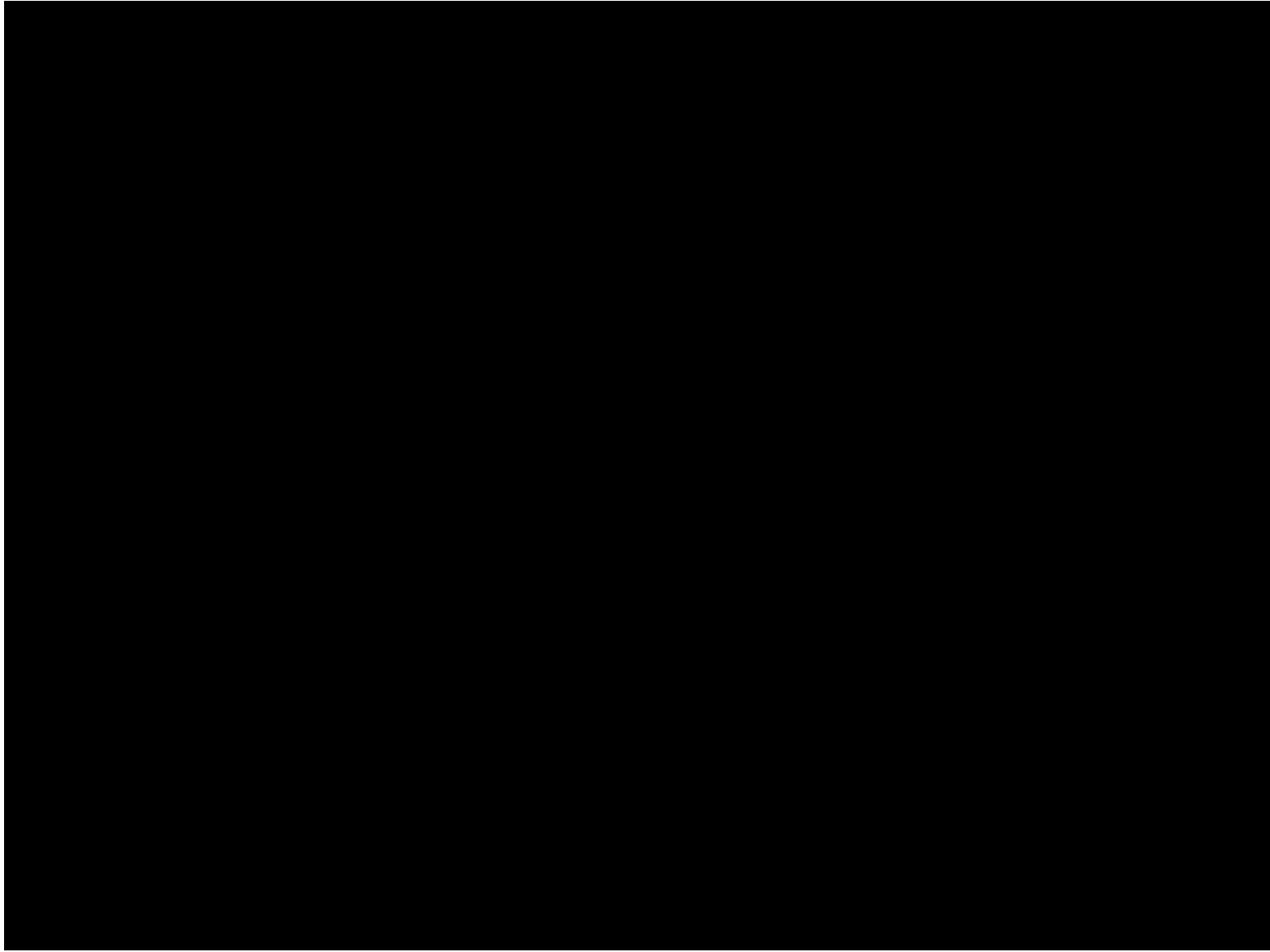
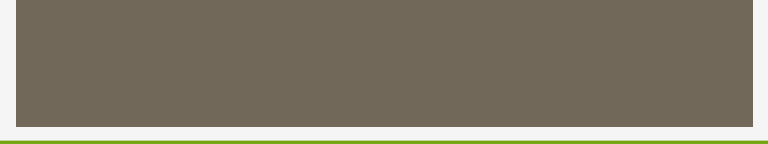
# Solicitation

- Face-to-face vs. written
- Don't offer too many choices
- Pairing up is effective
- “Listen” for the donors questions

# Stewardship:

## *The Zen of Fundraising*

- Be committed
- Have enough resources
- Be consistent
- Be quick
- Be personal
- Be visible
- Be meticulous
- Be available
- Be open and honest
- Be cheerful and helpful



# How, When, Why...

- # 1 reason = THEY WERE ASKED
- Right time, right place, right person
- People do not give to causes, people give to people who represent causes

# For example...

- Transitioning a \$250 donor to a major gift
  - Prospect Management
  - Research & Planning
  - Cultivation: calls, visits, notes, emails
  - Solicitation: calls & visits
  - Contact Reports
  - Stewardship

# Networking and Skill Building

- Make time for connecting with colleagues
- NDOA, AFP, etc.
- Read to fundraising blogs, Twitter feeds
  - 501 Videos: Movie Mondays / Tune-Up Tuesdays
  - Pamela Grow, Hildy Gottlieb, Erica Mills
  - Chronicle of Philanthropy



Questions?

# Thank you

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