

PhilanthropyMatters

We Share Your Passion!

March 2017

Dear Colleagues:

There is much talk about how important major donor or gift cultivation needs to be a significant component of your annual development plan. So regardless of the size of your staff, your annual fundraising goals or the number of special events you continue to implement, I wonder how much time you devote to developing an individual plan for each of your organization's major donors? Major donors often fall in the top 10% of your base and it doesn't matter whether your major gifts begin at \$5,000 or \$50,000.

To strengthen that commitment to focus on your major gift donors, how many of you have an actual plan for each of your major donors? If not, thanks to a blog by Dani Robbins, read further...

Plans allow us to do the work rather than think about the work. Map out a plan that lays out your giving requests for the year. You typically don't want to go to them five times in a year but if you do, you want them to know you are coming.

I recommend a plan for each Major Donor. I like plans. They allow us to do the work, rather than think about the work. So, write a plan for each of your major donors that maps out your giving request for the year. You don't want to go to them five times to ask for different stuff, or if you do, you want them to know you're coming. This is most easily accomplished by asking for what you want on whatever schedule is most comfortable for them, which is likely to be (but may not be) an ask meeting once annually and periodic stewardship check in meetings or calls throughout the year. Donorcentric is the goal. It may not be what is most comfortable for you. (If it was, we'd all get all our money in January.)

Putting together a major donor cultivation plan will, of course, require you to know your donors, their family, history of giving to your agency and possibly other agencies if you can find it; what they're passionate about; and your aspirations for their giving, which should be based on their level of engagement and capacity as well as who the right person is to send to ask. If you would like a sample template for building the individuals gift plan, please contact us and we will send you one.

Full article - (<https://nonprofitevolution.wordpress.com/2016/06/15/the-case-for-major-donor-cultivation-plans/>)



"Will-Nevers" for Fundraisers – An Idea from Jerold Panas

- 1) I will never miss a deadline.
- 2) I will never fail to warn my boss about a possible problem.
- 3) I will never violate a confidence.
- 4) I will never over-sell a program or project.
- 5) I will never let a donor down.
- 6) Even when things get tough, I will never be less than passionate about my work.
- 7) I will never be late for a meeting.
- 8) If I get a no from someone, I will never be discouraged. I will consider it a maybe.
- 9) I will never let anything keep me from being in regular contact with our friends and supporters.
- 10) I will never be less than loyal to my supervisor and my organization. If I can't be, I'll find another organization.



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Executive Fundraising Coaching

Our fundraising experiences in healthcare, social and community services have led us to a wide range of experiences of which we have been asked to share in a coaching role on a number of occasions.

We focus on growth areas in the following areas:

1. Major gift asks and cultivation
2. CEO interaction
3. Foundation board interaction
4. Staff supervision and goal setting
5. Managing your overall strategic development plan

Our Coaching Plan

What is an executive fundraising coach?

Best case scenario...a coach is someone who facilitates your professional growth and increased effectiveness. Most of the time this person is not an employee of your company. The reason for this is that executives need someone objective who is not swept up in the politics and can offer extremely confidential privacy. Tough things get discussed and you need a safe place where you know your business will not filter back into the system.

Routine meetings are scheduled over the course of six months. As much as possible these are face to face but phones and Skype work just fine too. At the beginning, you agree to some goals and aspirations you want to achieve and the coach tries to maintain that focus.

Again, best case scenario...you raise questions and pressing fundraising concerns that your coach helps tease out with you. S/he pulls out your best thinking and strategies before offering additional insights. Time is spent rehearsing or preparing for upcoming encounters so that you can try new behaviors. It is the coach's job to help you expand your perceptions and leadership repertoire so you can increase your impact. Over time you will discover that these new actions work well so you incorporate them and then move on to learn new ones.

So, a coach is someone you can trust who is smart enough to provide meaningful guidance and understands the challenges of leadership and focuses on the most important issues. A coach wants to help you be a fantastic leader and has the skills to get you there. Period. For more information about David Valinsky Associates' executive coaching, please contact us ([david@davidvalinsky.com](mailto:david@ davidvalinsky.com)).



The IJ & Jeanné Wagner JCC of Salt Lake City, under the direction of Executive Director Andrea Alcabas, has now begun the planning phase of their capital and endowment campaign. It will be its biggest effort

since their new building was opened in 2000. We are confident that great things will happen here!

