

# Major Gift Fundraising

---



Peter A. Caputo, CFRE

610-649-3351 [pac@caputoandassociates.com](mailto:pac@caputoandassociates.com) [www.caputoandassociates.com](http://www.caputoandassociates.com)

# Major Gifts are key to successful fundraising

---

Definition

Differentiation

What a major gift is not

# Ten essential steps in major gift fundraising

---

1. Commit to undertake a major gifts program. Get the right people and resources involved.
2. Identify potential prospects.  
A potential donor must have a certain level of affluence as well as some connection with your organization and/or your mission.

# Identifying prospective donors

---

- Look to previous donors.
- Look to people of affluence who could be aligned to your mission because of geography or because they may be users of your service or could be connected in some other way.

# Identifying prospective donors

---

- Ask current donors.
- Ask board members and other volunteers.
- Purchase a donor screening service.

# Ten essential steps in major gift fundraising

---

## 3. Determine strategy

- Amount
- Purpose
- Timing and manner
- Solicitors

# Ten essential steps

---

## 4. Preparation for the solicitation

- Coach the solicitors (must be donors).
- Prepare materials
- Decide who will ask
- Do not bring a written proposal

# Ten essential steps

---

## 5. Scheduling a solicitation meeting

- Who does the scheduling?
- Who gets invited?
- What is the best location?

# Ten essential steps

---

## 6. The Solicitation

The BEST solicitation sentence:

I've just given ABC Charity \$100,000 and I'd like you to join me in giving a like amount.

Then SILENCE.

# Ten essential steps

---

## 7. Negotiation

Be prepared for deflections:

The project doesn't interest me.

The amount is too high.

I need time to think about it.

I need to speak with my spouse.

I've maxed out my contributions for this year (or the next several years)

# Ten essential steps

---

## 8. Follow up

- Discuss follow up with the donor and agree on next steps.
- Solicitors should confer as soon as possible after the meeting to summarize facts.
- Send a confirmation letter including next steps

# Ten essential steps

---

## 9. Acknowledgment

Can't be too many, but should be planned and thoughtful. Involve beneficiaries.

## 10. Stewardship

Your donors are your best prospects.

# Questions and Answers

---

