



ARCS

ADVANCING
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**ARCS
FOUNDATION
OREGON**

PHILANTHROPY LUNCH & LEARN

SESSION #2

MAJOR GIFTS

CONDITIONS FOR SUCCESS & BUILDING A MAJOR GIFT PORTFOLIO

Thursday, February 1



WELCOME & INTRODUCTIONS

DIANA GORDON
PRESIDENT
ARCS FOUNDATION OREGON

Today's Topics



- 1. Overview of Major Gifts**
- 2. Conditions for Success**
- 3. Affluent Households**
- 4. Building a MG Portfolio**

WHAT IS MAJOR GIFTS?

Jump Start and Grow Your

MAJOR GIFTS PROGRAM



Major Gifts

“Major gifts focuses on securing high-value gifts from a small number of prospects with the capacity to give at the highest level. Major gifts may be less frequent and require substantial investment in the cultivation and solicitation of the donors, but they are high value and can be transformational for an institution” CASE

“An ongoing and thoughtful process of building and maintaining authentic, long-term relationships with a small group of individuals who share a passion for the cause you represent, have philanthropic intent, and financial capacity to provide significant resources to further your organization’s mission.” Lori Slaughter

36% consider \$10k a MG

88% total dollars raised from 12% of donors

53% say MG absolutely vital

58% do not have MG strategy

67% no full time MGO

75% say lack of investment reason for no MG program



CONDITIONS NECESSARY FOR SUCCESS



Clear Strategic Direction & Development Plan

History of Success

Healthy Donor Base

Accurate Data

Contemporary Software & Systems

Fund Management

Reporting – Executive & Management

Budget

Team – Skills & Knowledge

Gift Opportunities – Attractive, Varied & Flexible

Supporting Policies

Supporting Policies



Financial Checks & Balances

Donor Privacy & Bill of Rights

Gift Acceptance – Assets, Agreements, Pledges, Naming

Investment & Endowment

Operations – gift/pledge processing, data management, prospect management, moves management, etc.

Gift Opportunities

Variety of Commitment Levels

Opportunities support broader goals of the organization – growth/expansion, capacity/endowment-building, capital/facilities

Naming Opportunities Defined

Anticipated Impact



Team - Skills, Knowledge, & Time

Big Picture - Vision & Impact

Deep Knowledge - Cause & Current Environment

Relationship-Building, Natural Curiosity

Experience Engaging w/High-Net-Worth Individuals

Time



Budget - Operational Capacity

Modern Tech & Tools

Training & Conferences

Research & Data Appends

High-Touch Engagement

Accounting

Time



Affluent Individuals & Philanthropy



2023 Study of Philanthropy Report



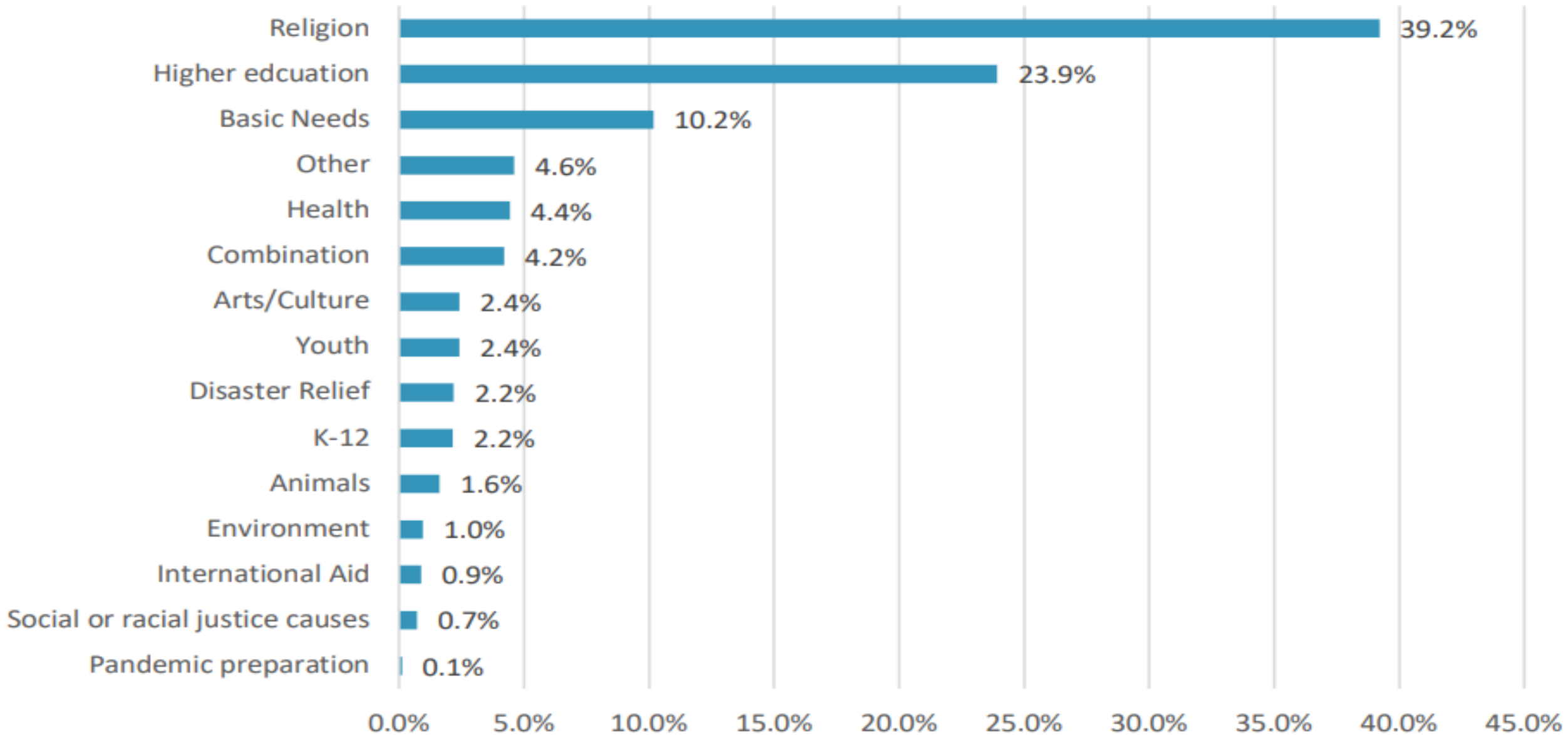
85% of Affluent Households Gave to Charity vs. 41% gen pop

Avg Gift = \$34,917 vs. \$2,581 gen pop

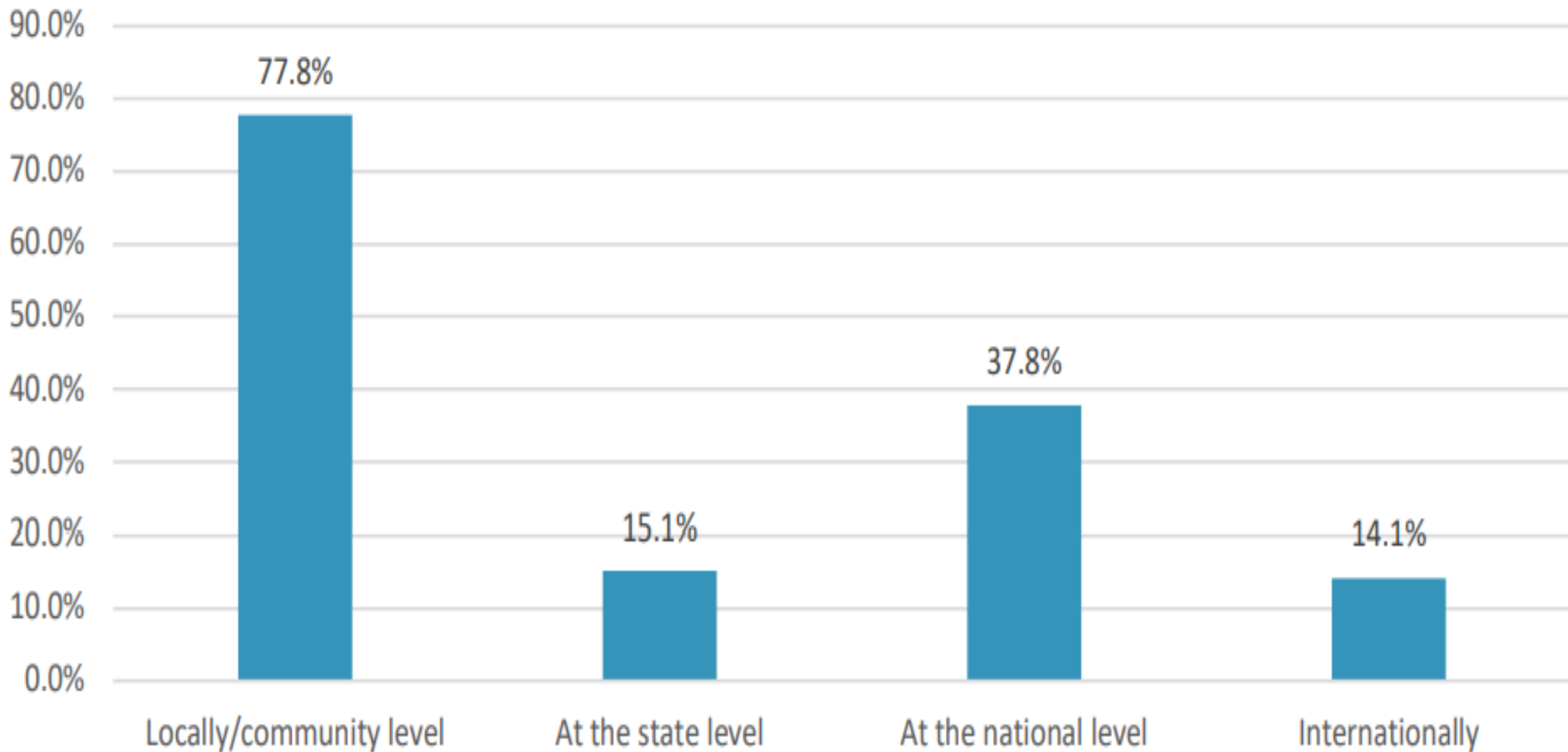
More likely to give (85%) than volunteer (36.8%)

85% Confidence in nonprofits to solve complex societal & global problems

DISTRIBUTION OF AFFLUENT DOLLARS BY CHARITABLE CATEGORY



GEOGRAPHIC FOCUS OF AFFLUENT CHARITABLE GIVING



Experts vs. Novices

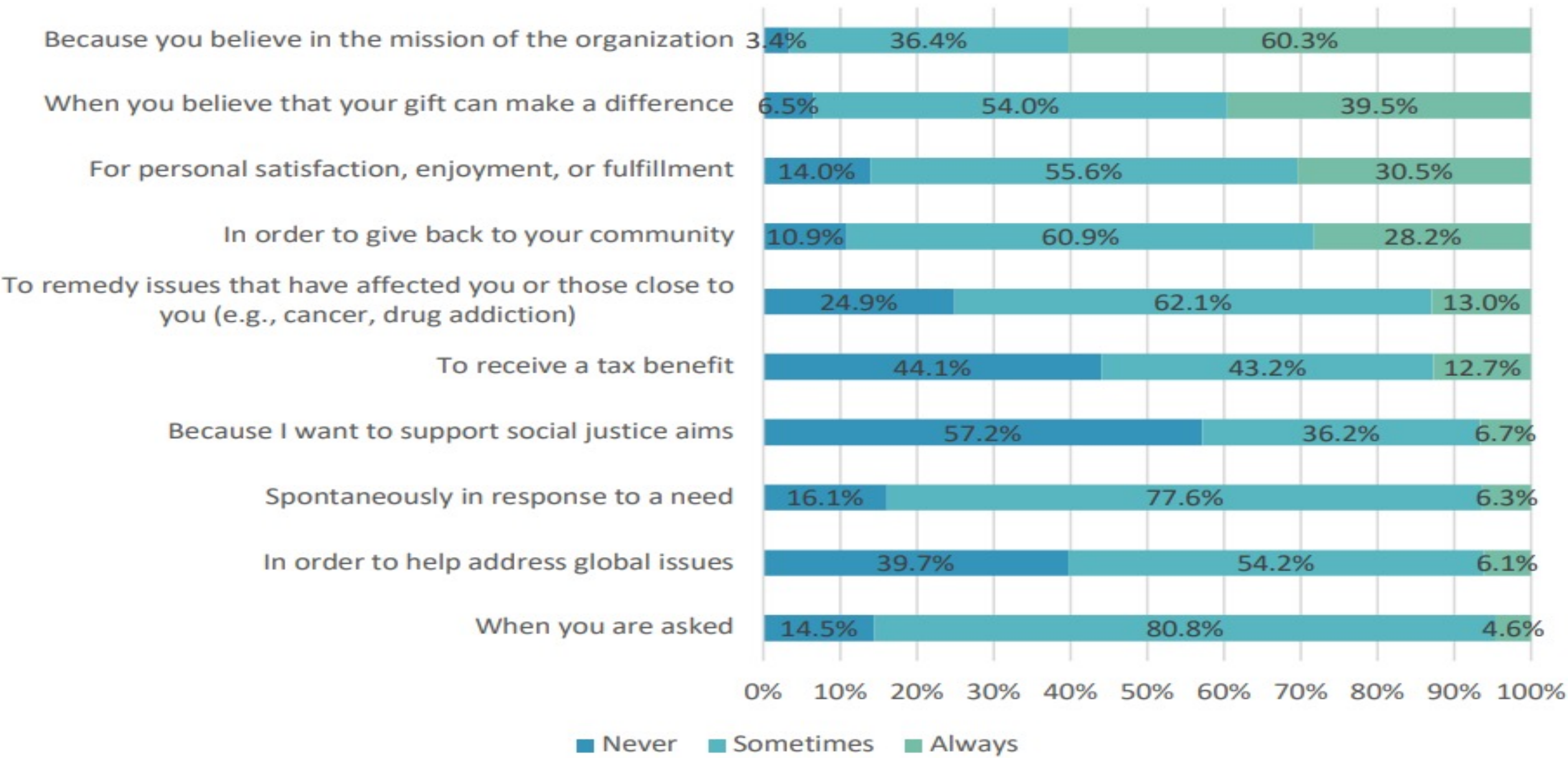
47% novices vs. 3.8% experts

Average Gift - \$43,838 experts vs. \$2,818 novices

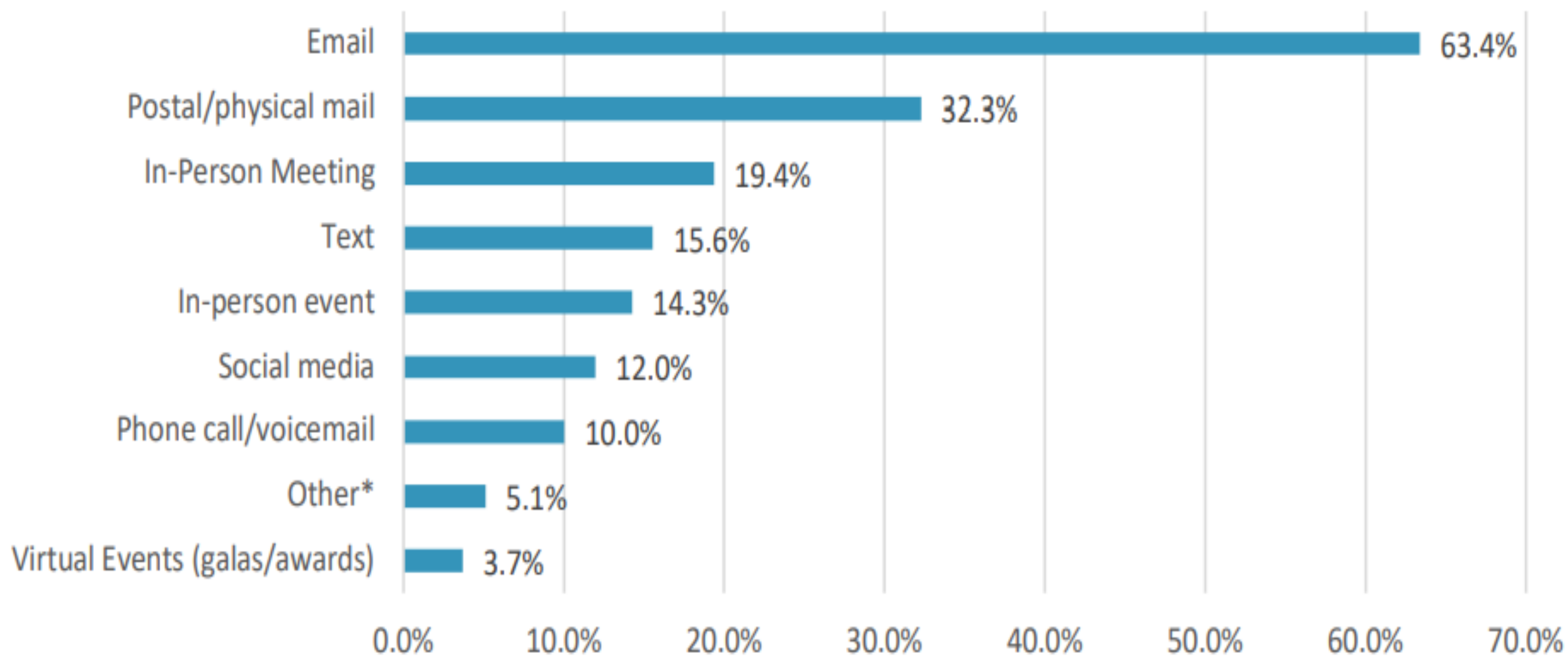
Majority of experts monitor impact of giving

54% of Experts use a giving vehicle

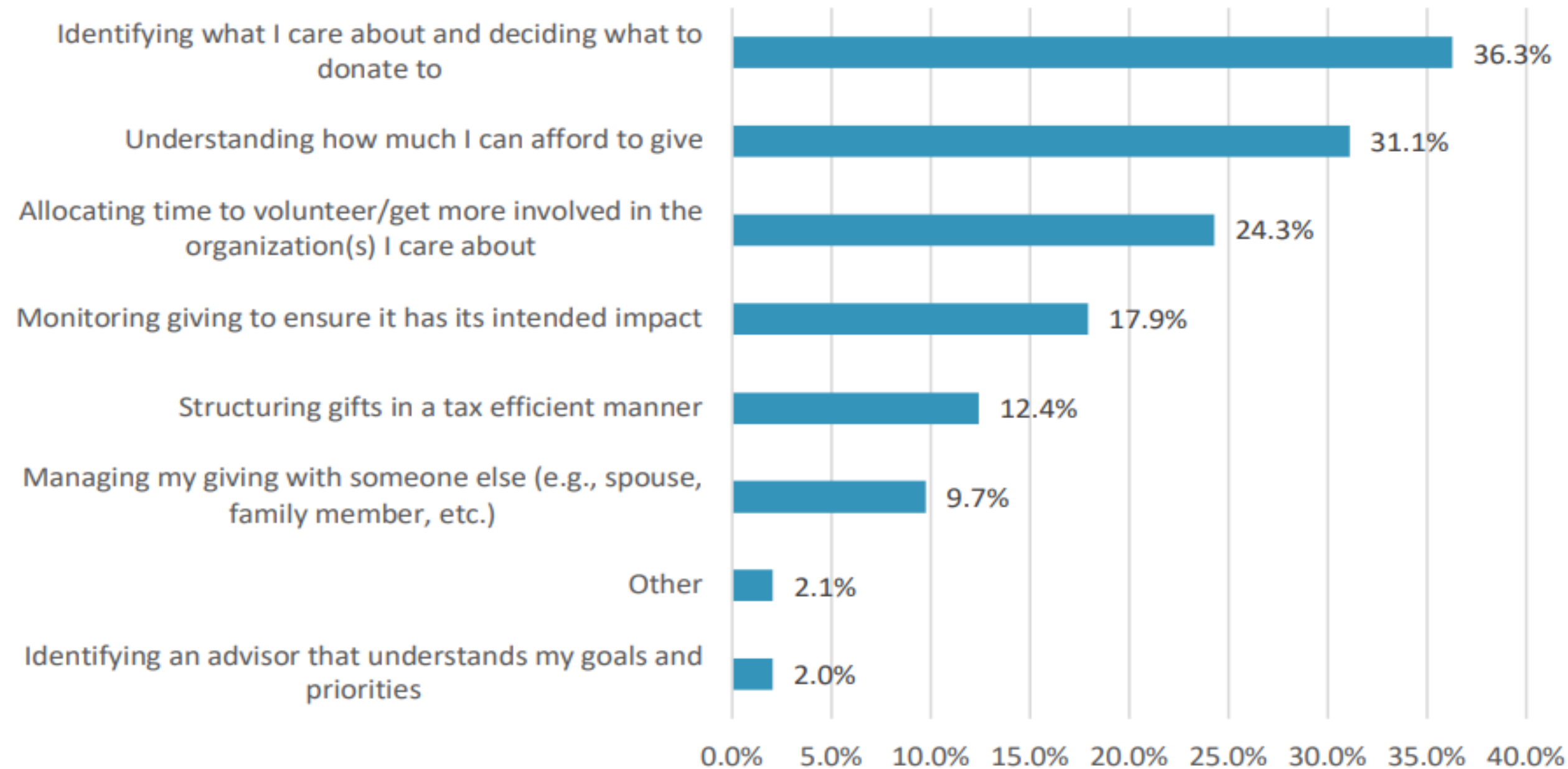
AFFLUENT DONORS REPORTING GIVING BASED ON MOTIVATION TYPE



TYPES OF ORGANIZATION OUTREACH PREFERRED BY AFFLUENT HOUSEHOLDS



Which of the following are challenges to your charitable giving:



BUILDING A MAJOR GIFTS PORTFOLIO

Basic Concepts



EXAMPLE GIFT RANGE CHART



Gift Amount	# of Gifts	# of Prospects	Cumulative Total
\$150,000	1	4	\$150,000
\$75,000	2	8	\$300,000
\$40,000	4	16	\$460,000
\$20,000	8	24	\$620,000
\$10,000	16	32	\$780,000
\$5,000	24	48	\$900,000
\$2,500	40	80	\$1,000,000

MG Relationship Process



Identification/Research – Gathering Relevant Info

Discovery – Exploring Interests

Cultivation – Educating & Inspiring

Solicitation – Offering Opportunity for Impact

Gift Negotiation – Confirming Mechanics of a Gift

Stewardship – Gratitude, Sharing Impact, Next Investment

New Donors

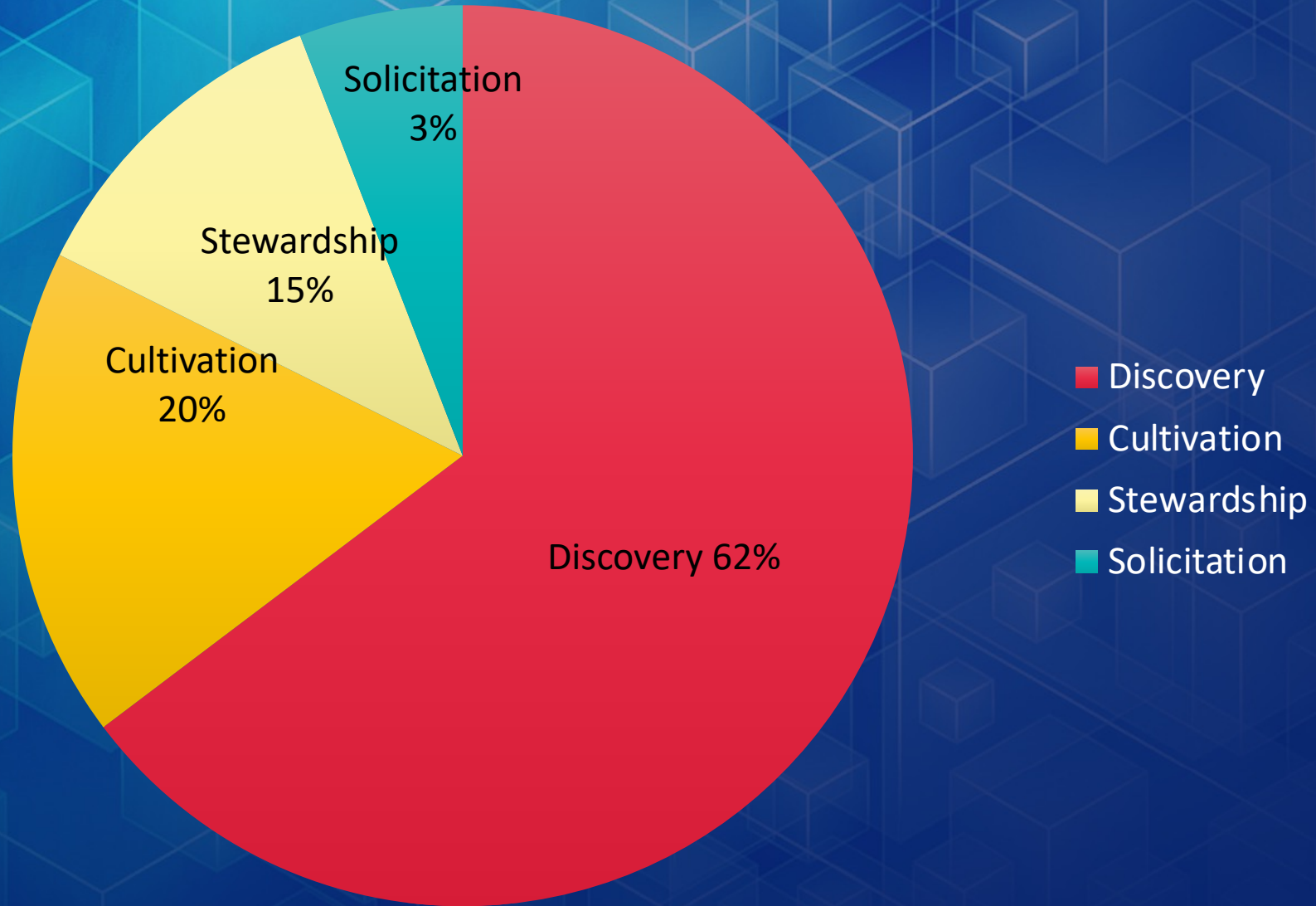
Major Gifts Cycle = 18 months



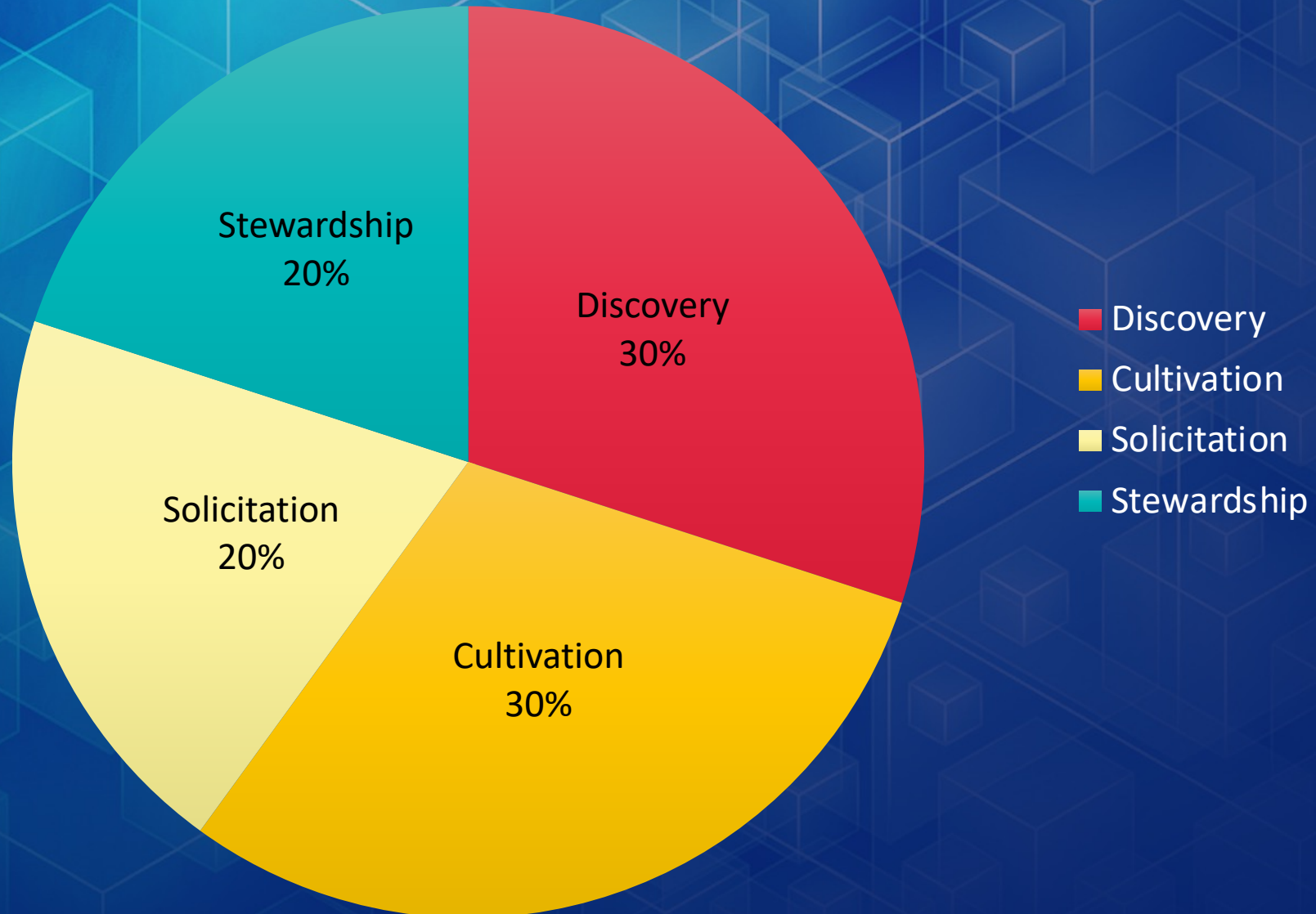
Long-Term Donors



Example - New Portfolio



Example - Mature Portfolio



BUILDING A MAJOR GIFTS PORTFOLIO

Identification



Where to Find Prospective Donors



Donor Database

Volunteer Lists

Board Member & Volunteer Networks

Participant Lists/Event Attendees

Like Organization's Donor Lists

News/Business Journal

Internet/SM/Corporate Websites

Purchased Lists



Profile of a Major Donor



They have financial capacity

They are philanthropic

They are interested in your cause

They are connected to your organization

Understanding Financial Capacity



History of Major Gifts

Assets

Business Titles

Residence

Hobbies

Philanthropic Intent



Giving History

Articulated Charitable Interests

Board Service

Presence of Giving Vehicle

Interest in Cause

Giving History to Cause

Articulated as A Charitable Interest

Board Service in Cause Space

Connection to Org

Donor

Board Member or Volunteer

Beneficiary

Involvement with Like Organizations

Participant/Event Attendee

Connection to Board/Donor

Profile of a Major Donor



They have financial capacity

They are philanthropic

They are interested in your cause

They are connected to your organization

Questions

Upcoming Sessions



Thursday, February 15th – Major Gifts: Aligning Donor Interest with Mission w/Guest Speaker Jamie Brown, Sr Director of Development OHSU Foundation

Thursday, February 29th – Planned Giving: The Basics

Thursday, March 14th – Grants: Overview of Funding Environment

Please Stay in Touch



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Sources



DonorSearch

2023 Study of Philanthropy Report

Veritas Group

Fundraising Effectiveness Project 2023 Report

National Center for Charitable Statistics

The Center for Policy Studies