BUILDING A DYNAMIC INDIVIDUAL GIVING PROGRAM

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AGENDA

....what’s in it for me

❖ 50% talking
❖ 50% questions and problem solving

❖ Goal – at least one new thing or new contact
PRIMER

Broadbase

- Gifts under certain threshold
- 90%+ or more of your donors
- 10-30% total fundraising $$
- Direct mail, email, telefunding
PRIMER

Major Gifts

• Gifts over a certain threshold
• 10% or less of your donors
• 70-90% of total fundraising $$
• Personal, direct asks
**Data. Data. Data.**

Love your data and it will love you back

- Address (NCOA), including cell and email
- Ticketing data
- Donor Data
- Age Data – second last!
- Wealth screening – LAST!
WHO TO CHASE

- LYBUNTs. Figure out why last year but not this year and unlock lapsed donors.

- SYBUNTs are a worthy chase but not always worth the effort

- Super Subscribers, they buy the most expensive package but never give most likely because they've never been asked. Find them, they're in your database.
Give a man a fish...

- Make friends with marketing
- Donors are already in your DB
- Subs, CYO, Pops, STIX – all ticket buyers are equal, but some are more equal than others
- Get closer; warmer = better prospect
METHODODOLOGY 101

Broadbase
- Mail, email, telefunding - should I use them?
- When?
- How?
- What – what is the most effective pitch?
- Social Media – does it work?

- What about servicing?
BE BASIC

- **Case** – clear and concise and understood by everyone
- **Donor levels and benefits** – consistent and deliverable (and delivered)
- **Materials** – web, brochures, email, invitations, ads – consistent, simple, elegant
- **Letters and fulfilment pieces** – Solicitation, Receipt Letters, Pledge reminder, Pledge Forms
- **Stewardship plans** set in place for the year; some flexibility
Pipeline to Major Gifts

- Broadbase is the pipeline to Major Gifts
- There’s gold in them thar hills – should you use a wealth screening service?
- Research – useful tools to use in house, when you should consider hiring a researcher
**THE ULTIMATE GIFT**

- Easy ways to incorporate this message
- Typical planned givers have 10 or more years of history and are most often 50+ years in age
- Most planned givers never speak up, are silent saints
- Get to know professional community
- Be kind. Always.
OTHER THINGS TO CONSIDER

- Benefits and stewardship – do they really matter
- Volunteers + Staff – a winning combination
- Staffing levels, for broadbase and major gifts
- A word about people who attend special events
QUESTIONS