

Major Gifts

The Why + The How



A person wearing a grey blazer and dark top is holding a rectangular black sign with a light-colored wooden frame. The sign is held up with both hands, positioned in front of a red brick wall. The word 'WELCOME' is written on the sign in a white, bold, sans-serif font. The entire scene is set against a solid blue background.

WELCOME

Presenters



Kimberly Liebowitz
Connect and Grow Consulting



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Good Works Consulting, LLC

Today's Sessions

Session I: Why have a special event? How to host an event that engages donors for a lifetime.

Session II: Why have major donor giving program? Steps to build a successful major gifts program, how to identify major donors for your organization.

Session III: What is an annual giving program and why do you need one? How to conduct a successful annual giving program including examples of how to develop a plan and calendar.



1.6 Million Nonprofits
registered with the IRS

\$471.44 Billion Given in 2020

Most nonprofits are small and community-based, serving local needs:

92% spend less than \$1 million annually

88% spend less than \$500,000



Major Gifts: Why?



Because...

Your community,
donors, volunteers
and stakeholders
deserve it.

And Because...

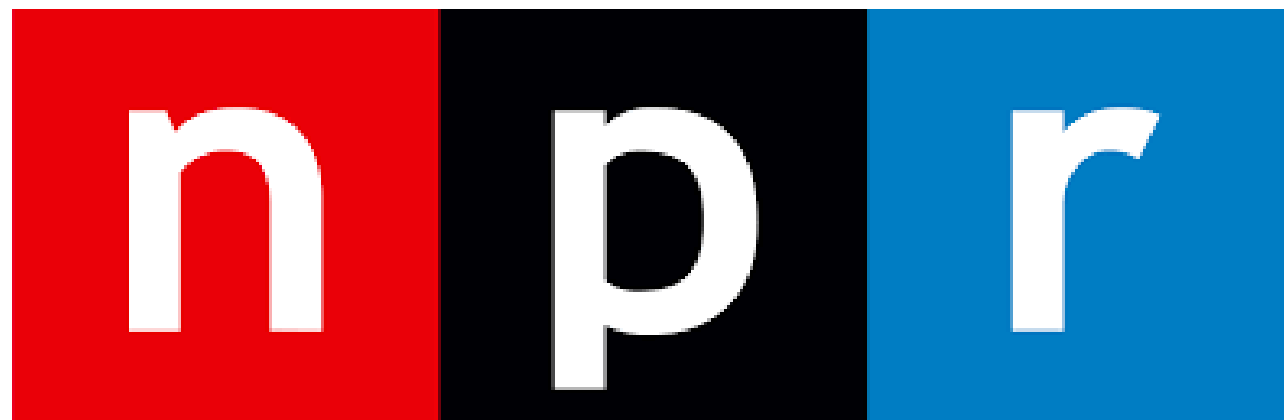
The money is out there.

Recent Headlines

businessinsider



**THE
WALL STREET
JOURNAL.**



The "Great Wealth Transfer" will see an estimated \$68 trillion passed down from boomers over the next 30 years.

By 2030, millennials will be five times richer than they are today

Americans can expect to inherit \$72.6 trillion over the next quarter century

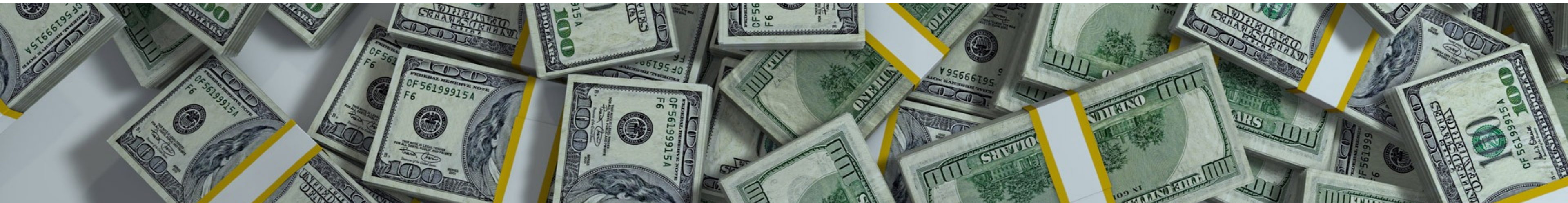
The "Great Wealth Transfer" is estimated at \$59 trillion dollars in the U.S alone, with nearly half estimated to support charitable purposes

Will 'the Great Wealth Transfer' Trigger a Millennial Civil War?

Older Americans Stockpiled a Record \$35 Trillion. The Time Has Come to Give It Away.

U.S. households are expected to transfer
close to **\$70 trillion** to their heirs and
charities by 2042.

**That's \$9.6 Billion A Day
Every Day
For 20 Years**



What can you buy for \$1 billion dollars?

Buckingham Palace is valued at
\$2.9 billion

Atlanta Braves are valued at
\$1.875 billion

Private Island in the Bahamas
\$75 million





Going to Disney World

VS

Buying Stock in Disney

**Philanthropy is evidence that
someone's values are alive
and manifested in the world.**

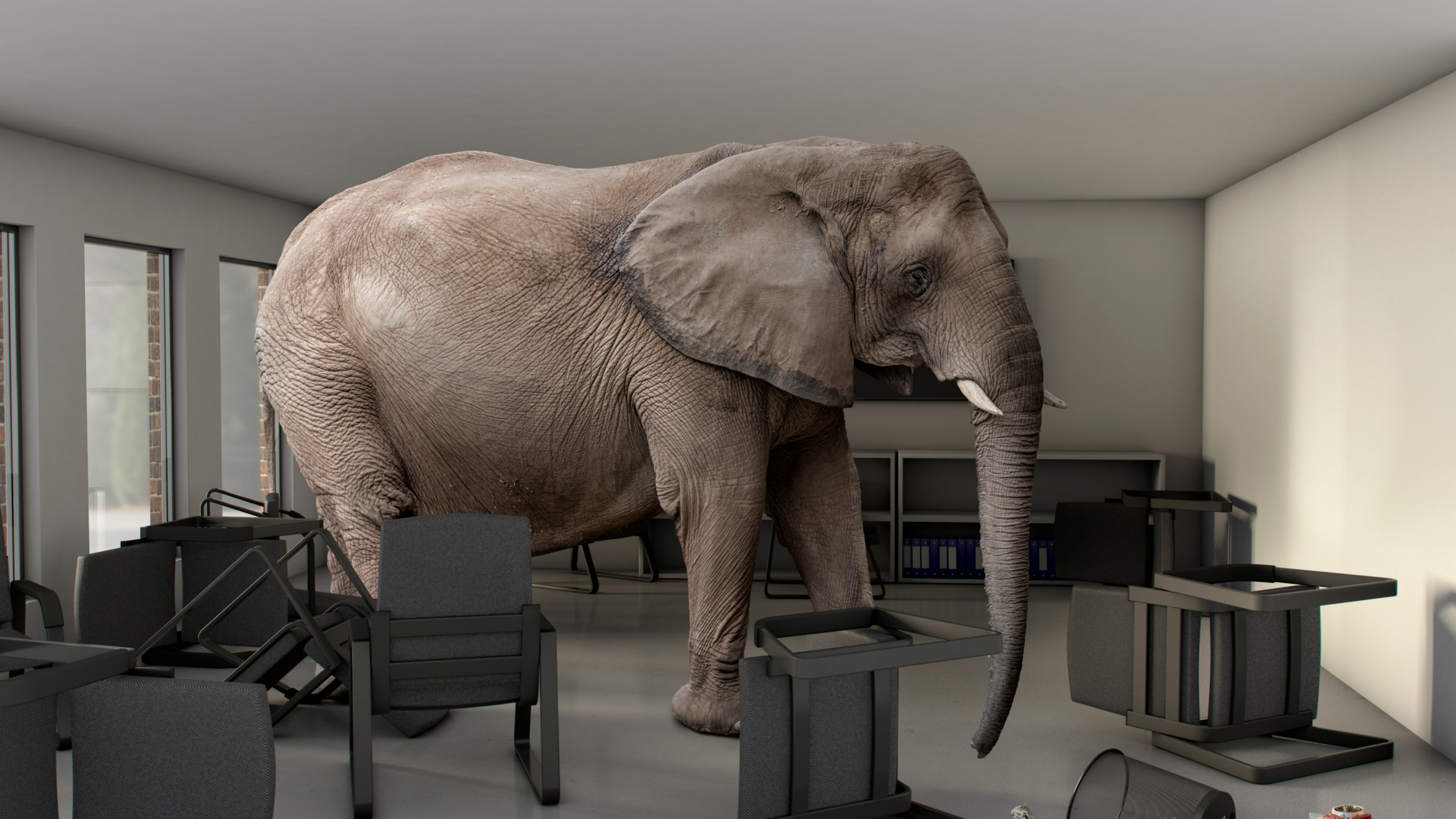
Major Gifts: How?





Top 5 "Gotta Know It" for Major Gifts

1. Elephant in the Room
2. Name It
3. Top 25
4. Know your revenue model
5. Ditch the (elevator) pitch





Know Thyself

**What values are you
attaching to money?**

**Power. Greed.
Privilege. Authority.**

**Justice. Influence.
Courage. Love.**

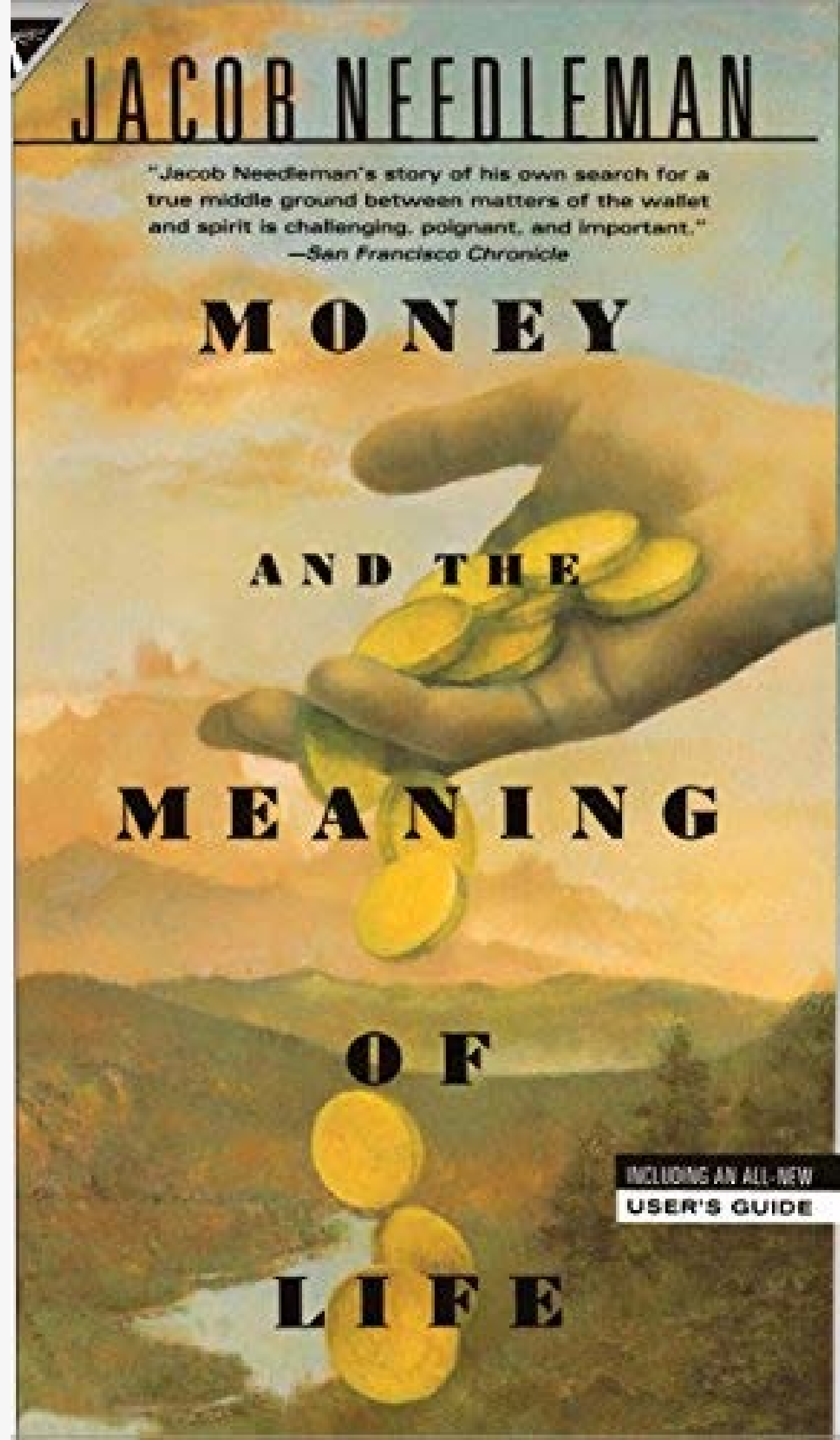
With a New Introduction
Foreword by Jack Canfield, author of *Chicken Soup for the Soul*



Transforming Your Relationship
with Money and Life

Lynne Twist

"A life-changing read. With warmth, honesty, and storytelling, Lynne turns everything we think we know about money upside down. . . . It's the book we all need right now."
—BRENE BROWN, Ph.D., author of the #1 *New York Times* bestseller *Braving the Wilderness*



JACOB NEEDLEMAN

"Jacob Needleman's story of his own search for a true middle ground between matters of the wallet and spirit is challenging, poignant, and important."
—*San Francisco Chronicle*

MONEY

AND THE

MEANING

OF

LIFE

INCLUDING AN ALL-NEW
USER'S GUIDE

THE INTERNATIONAL BESTSELLER

The
Psychology
of
Money



TIMELESS LESSONS ON WEALTH, GREED,
AND HAPPINESS

MORGAN HOUSEL

"One of the best and most original finance books in years."
—JASON ZWEIG
Wall Street Journal

Hb

2

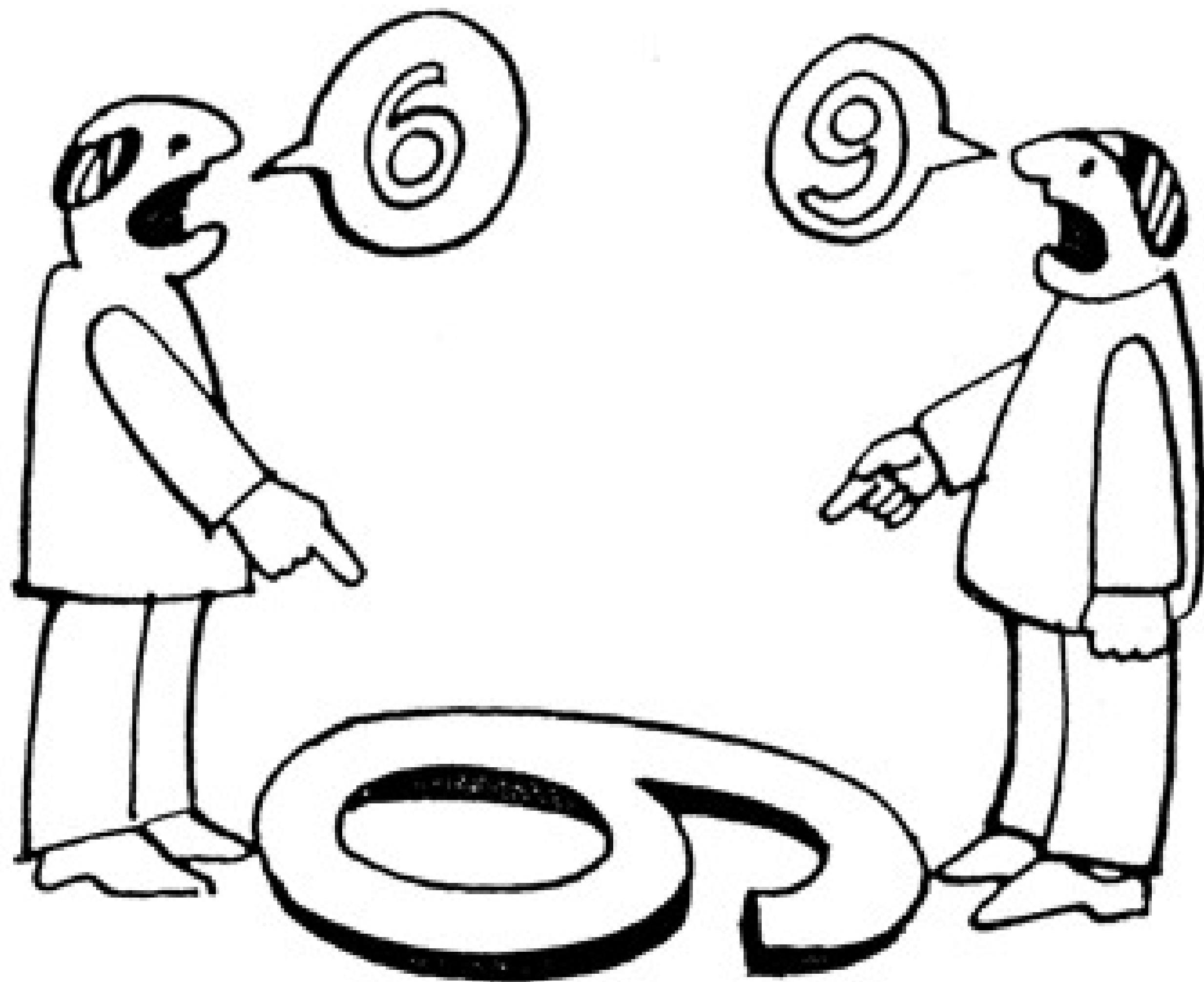
Define "Major"
Gift (and then
tell everyone)



ma·jor

adjective

important, serious, or significant.



3

Know Your Top 25.


Cultivate. Steward. Solicit.

A solid blue horizontal bar spanning the width of the slide, located at the bottom.

4

Know your
revenue model.

Understand its influence
on your organization.

A solid blue horizontal bar spanning the width of the slide at the bottom.

49% EARNED
Private Fees for Services



31.8% EARNED
Government
Grants/Contracts



8.7% DONATED
Individuals



2.9% DONATED
Foundations



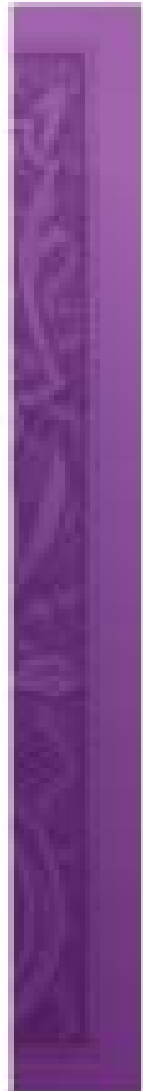
1.5% DONATED
Bequests



.9% DONATED
Corporations



5.2% Other





5 Ditch the (elevator) pitch.

Don't Ask for



HELP

"Please help us to ..."

**"You have the ability to influence / change /
impact ..."**

It's not a "cry for help," it's an invitation to action.

Questions To Ask Major Donors:

When did you know you cared about this work?

Who modeled philanthropy for you?

What does "success" look like to you for our work?

What other causes do you care about?

What do you wish you knew about our work?

Would you be willing to share your story of giving with our staff / board?

Questions To Ask:

Is your family aware of your philanthropic priorities?

How do you like to be thanked / communicated with?

Does our work feel "urgent" to you?

Do you prefer the "data" we share about our work or the personal stories?

**PEOPLE REMEMBER 75% OF WHAT THEY SAY
AND ONLY 25% OF WHAT YOU SAY**

Reflection Questions:

What are your earliest memories of philanthropy/charity?

What is your organization's revenue model? How does it influence your work?

What questions do you like to ask "major donors" to better understand their motivations/inspirations for giving?

Contact Us



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