



Philanthropy on Cape Cod Day

November 1, 2011

MAJOR GIFTS

Priya McCue, Chief Development Officer
Woods Hole Oceanographic Institution

Where do WHOI's Major Donors Come From?

- Majority are trustees or corporation members (260 members total)
- Balance are connected to us by board members
- WHOI has no built-in constituency, i.e., grateful patients, alumni

Engagement Vehicles

- Trustee and corporation membership
- Ocean Institute committees
- Cultivation events (big and small – both can be important)
- Visits to campus
- 1930 Society – NEW

1930 Society: Building the Major Gifts Pipeline

Recognizes Associate members who give \$1,000 or more annually

Offers opportunities for intellectual engagement with WHOI:

- Invitations to science presentations and other WHOI special events in Woods Hole and other locations, such as Boston, New York and Washington, D.C.
- Event in Woods Hole with WHOI's president
- Science immersion experiences, hosted by a WHOI scientist
- Private WHOI tours and opportunities to meet one-on-one with scientists
- *Oceanus* magazine
- Annual Associates gathering in Woods Hole
- Discounts at the WHOI store and at more than 250 science museums
- Our monthly e-newsletter
- Recognition in our donor report as a 1930 Society member

Cultivation Events

Role of board members:

- Weigh in on event content
- Identify and personally invite new people
- Follow up with new prospective donors
- Host an event

WHOI Event Attendee Guidelines

- An interest in the ocean, the environment, science, marine conservation, coastal issues, WHOI specifically
- Philanthropic intent
- The capacity to make a major gift to WHOI (defined in this case as \$50K or greater)
- Influence and/or access to other influential individuals

Post-event

Post-event, WHOI board members lead the follow-up efforts. They suggest:

- Having a conversation with a WHOI scientist in the guest's city
- Attending upcoming presentations by WHOI scientists
- Visiting WHOI's campuses in Woods Hole for a first-hand look at the scientists and engineers at work.
- Joining the Institution's 1930 Society.

Event Evaluation – it's all about data!

Post Event Review Form

Name of event: River Club

Event Date: 2/1/2011

Report Date: 8/30/11

Attendance:

Number of people invited: 197

Number of people attended: 88 (59 + 29 spouses)

	Board/Corp members	Non Board/Corp members	Total
Number of gifts received	14	9	23
Number who have given	11	8	19
Total amount of gifts	\$296,659	\$311,466	\$608,125
Number of people who have given first time gifts	1	8	9
Number of attending (couples counted as one)	25	34	59
Number of these that are new prospects. Those whose first contact was the event:	1	19	20
Number of people who have since attended another event.	18	6	24
Number of people who have visited campus, had a meeting or interaction with WHOI	25	23	48
Number of people who have been nominated to the Board or Corporation	N/A	1 nominated 2 elected	1 nominated 2 elected

Notes:

- Of the \$311,466 from non-board/corporation members, \$308,066 was from a single donor whose solicitation began before the event
- One individual became a corporation member after the event and gave \$5,000. This amount is reflected in the board/corporation total
- All attendees will be solicited in 2011

Take-aways

- Effectively use your board members as connectors throughout the process
- Educate them to be the most effective ambassadors
- Provide them with “points” along the process that hasten cultivation
- Ensure annual giving is viewed as a point in the cultivation process, i.e., 1930 Society



WHOI Major Gifts Case Study

“What Do I Have To Do To Raise A Major Gift?”

**Philanthropy Day on Cape Cod
November 1, 2011**

Christopher J. O'Connor, CFRE
President
Cape Cod Healthcare Foundation



Major Gift Pipeline

Where do CCHC's Major Gift prospects come from?



- Grateful Patients
- Board Member Referrals
- Partnering with Physicians
- Donor Cultivation Events
- Research/Real Estate Transaction Screening
- Donor Concierge Program



Case Study – Recent Major Gift to CCHC

- Retired couple from Boston
- First attempt at contact 2001
- Board Chairman made contact 2002
- Various requests for meeting & to attend events 2002 – 2004
- Joined Donor Concierge Program in 2005


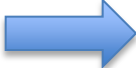
Case Study - continued

- First face-to-face visit in Florida 2005
- Annual Fund donors/Donor Concierge Program 2006 – 2007
- February 2008  Introduced new project, they expressed interest
- June 2008  Asked for first major gift – \$500,000 committed!




Case Study - continued

- Visited in Florida, February 2009 & on Cape in June 2009
- Dinner in Florida, February 2010
- Phone discussion April 2010  Described emerging capital project
- Research/discussion revealed several multi-million \$ gifts to Boston AMCs.

Case study – continued

- May 2010  Tour of two facilities, lunch & solicit for \$3,000,000
- Multiple discussions with donor's attorney, who oversees family foundation
- Lunch with CEO and Foundation staff
- July 2010  \$3,000,000 committed!

Case Study - continued

- October 2010  Request to honor couple at industry conference
- February 2011  Dinner in Florida, brought architectural renderings
- June 2011/Sept 2011  Lunch on Cape, brought CEO & showed new signage, brought floor plans

Volunteer Engagement – Ways You Can Help

