

COPLEY



Orchestrating Major Gift Success

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President

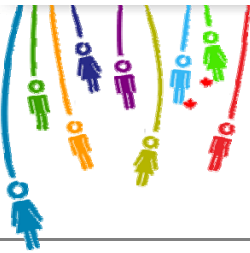
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What I will cover



Real-life experiences that illustrate key principles for major gift success

Discovery of unconscious competencies and examples of how we used them intentionally

Introduction to powerful communication skills that will work with all behavior styles



Key principles



85% of success in fund raising is based on extraordinary relationship and rapport skills. *These are teachable.*

Research pays off.

The most important major gift marketing strategy is building relationship networks.

Getting to yes may be a bumpy ride, so hang on.

Cultivating people, not entities-- yields bigger results.



Key Skill-Sets



Speaking to all styles: emotions and metrics make a compelling combination

Creativity with gift strategies and structuring

Empowering the donor to create life meaning through giving

Matching gift vehicle to the motivation and behavioral style of the donor

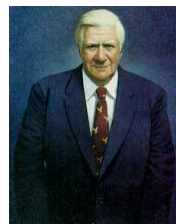
Managing ethical dilemmas and PR impact



Make friends BEFORE you need them.

Congressman Tip O'Neal

Truism 1



Your chances of getting a gift
are much better if you ask
for it than if you don't ask.

Larry G. Raff

Truism 2



Dogs always ask for
what they want.




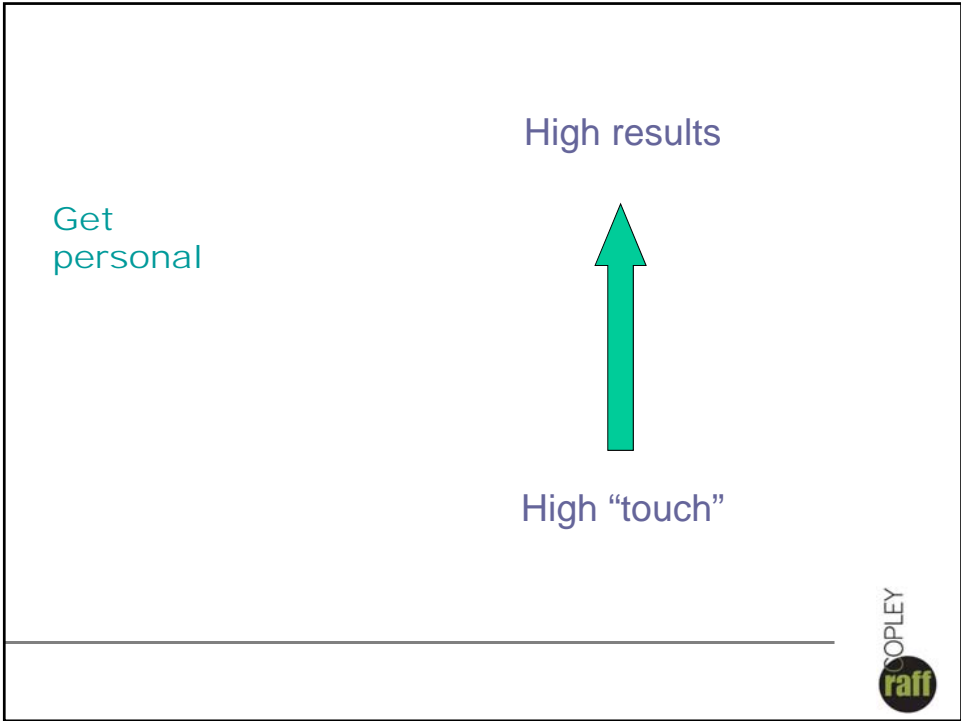
Disconnect
your biases

Throw out your personal feelings about
money— biases can effect your comfort
when asking for a gift.

Get comfortable asking for any amount.


Ensure that you are never surprised by the
response to an ask.





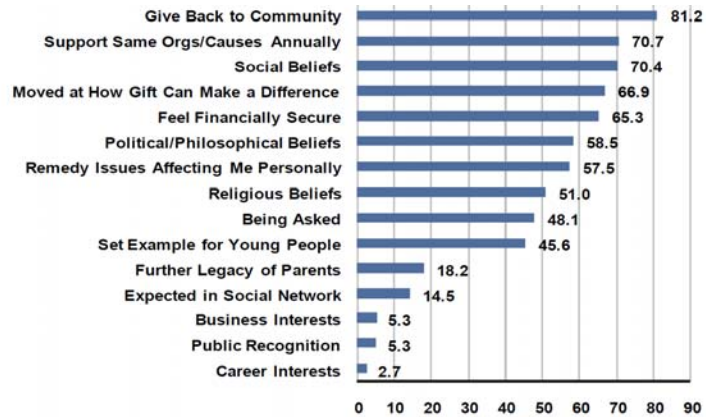
The philanthropy behavior of high net worth households

Start with basic understanding



There are Many Major Gift Donor Motivations

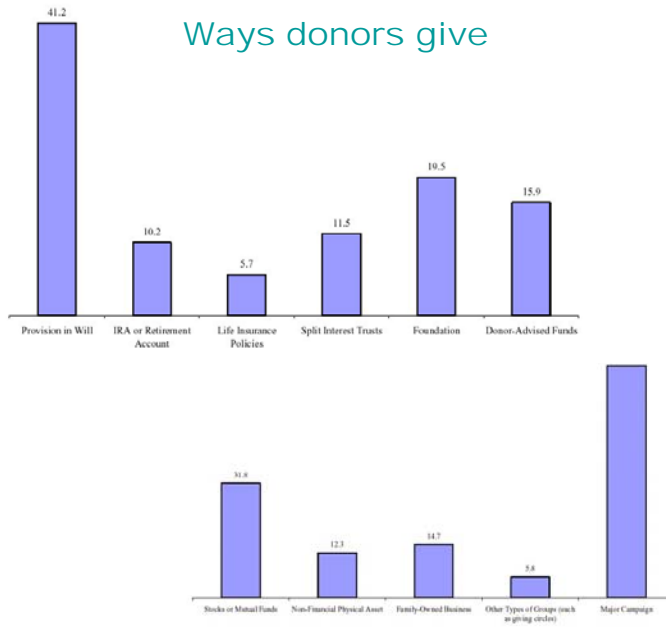
What Motivates HNWH to Give (%)



B of A's The 2008 Study of High Net Worth Philanthropy, March 2009, The Center on Philanthropy, Indiana University



Ways donors give

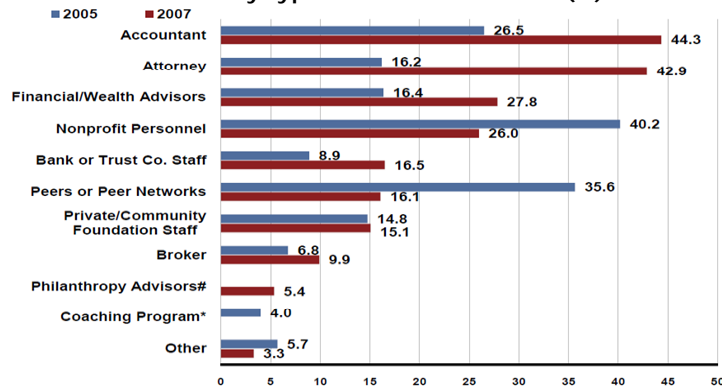


B of A's The 2005 Study of High Net Worth Philanthropy, March 2006, The Center on Philanthropy, Indiana University



Giving Advisors

HNWHs That Consulted Others When Making Charitable Giving Decisions by Type of Person Consulted (%)



We WERE the most important advisor.

B of A's The 2008 Study of High Net Worth Philanthropy, March 2009, The Center on Philanthropy, Indiana University



What is rapport



Rapport is one of the most important features or characteristics of *unconscious* human interaction.

It is commonality of perspective, being in "sync," being on the same "wavelength" as the person with whom you are talking.

Rapport is the feeling of harmonious connection between people or groups of people.

Techniques to build rapport include: matching and mirroring your body language, voice tone and volume and descriptive language.

Rapport techniques can be learned and applied intentionally to increase relationship success.



Neuro-Linguistic Programming



Neuro-Linguistic Programming embraces three simple concepts.

We experience our reality through our neurological system. Everything we encounter is channeled and processed through our five senses.

Our neural representations are coded, ordered, and given meaning through language and non-verbal communication.

Each person expresses his or her unique "program" for communication that we can learn from to establish rapport, relationships, trust, and influence.



Being in sync



People feel understood and safe with people who are like themselves.

Match the donor's volume, tone, and rate of speech to increase trust and to foster the donor's willingness to communicate.

Mirror the donor's body language with subtlety to automatically increase rapport.

Like partners in a dance, we unconsciously mirror each other's movements and postures.

When you are in pace with your dancing partner, you will easily lead them to the next step.



Read the donor



Great Major Gift officers can “read” people. Most do this unconsciously. They are “Unconscious Competents”

We can all become “Conscious Competents” through basic education in Behavioral Type, Emotional Intelligence, and NLP.

Whether you are already an “Unconscious Competent” or not, these tools will empower you to intentionally design your behavior and your communication for success with your donors.





Bob and Marilyn in NYC



Year of ask:	1997
Cause:	Diabetes research campaign
Donor net worth:	\$500 million+
Occupation:	Major investor, both in late 70's
Ask amount:	\$20,000,000 lead trust
Principle:	Research pays off.



Bob and Marilyn in NYC



OUTCOME:

\$2.5 million gift to JDRF

\$5 million gift to Rockefeller University

LEARNING POINTS:

Great wealth can be found behind small checks.

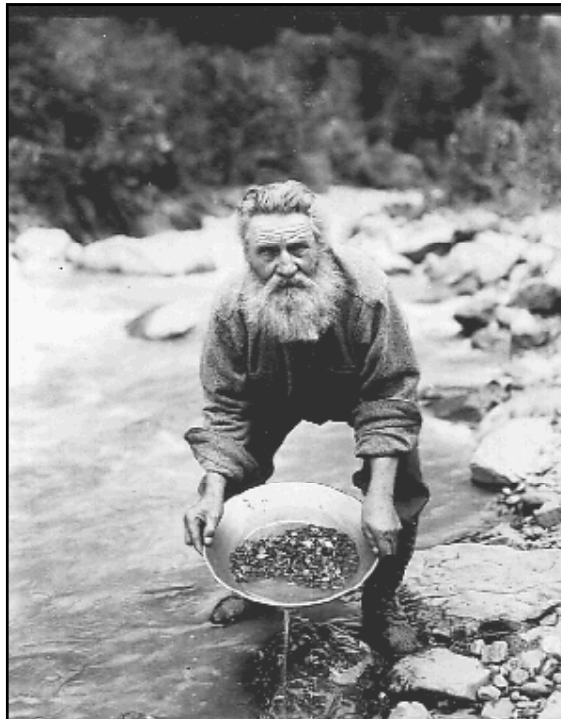
Getting prospects to cultivation events is fundamental, that is where you can begin rapport building.

Respect confidentiality

Competing organizations may dovetail on your work.

Persistence pays off in the context of a relationship.

Design your ask in response to the circumstances.



Building your Major Gift Pipeline



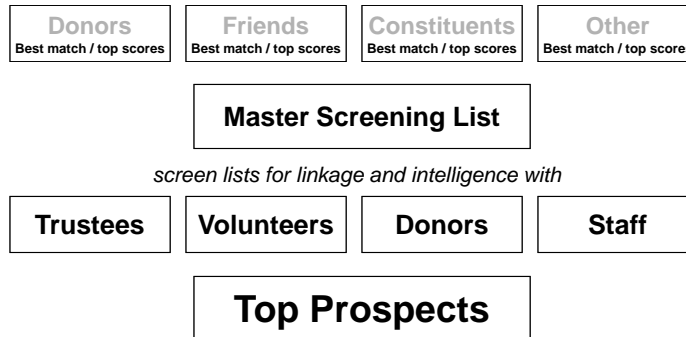
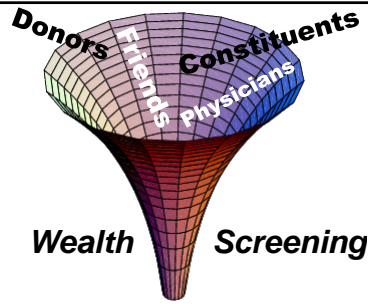
Prospect sources



- Wealth screening of donors
- Loyal donors of many gifts over many years
- Annual Fund donors
- Ticket purchasers
- Membership
- Patients and physicians
- Parents
- Referrals from staff, volunteers or development officers
- Trustees and officers of targeted foundations
- Executives of targeted corporations



Prospect screening system



Quality of relationships

SCREENER NAME: _____

WILLIAM SHATNER
Randolph 1 2 3 4

SARAH McLOUGHLIN
Braintree 1 2 3 4

ARTHUR MURRAY
Abington 1 2 3 4

GEORGE STEPHANOPOULOS
Brockton 1 2 3 4

MARY CONTRARY
Randolph 1 2 3 4

1=willing to write note on invitation 2=willing to invite to lunch
3=willing to invite to dinner with CEO 4=recommend for greater campaign involvement
CIRCLE ALL THAT APPLY



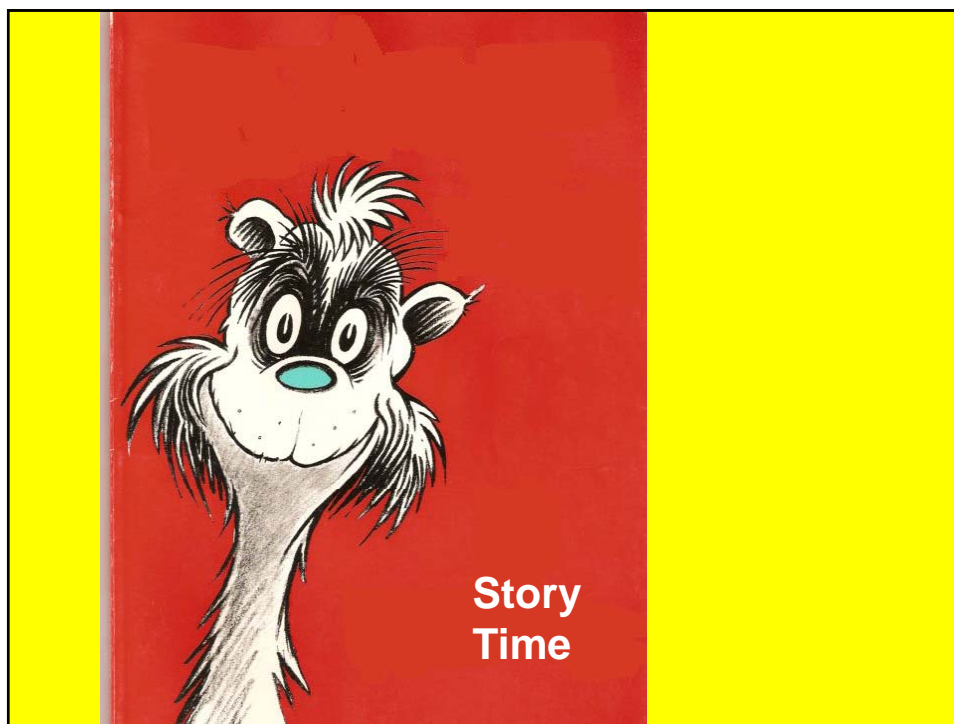
Always have a list of elusive prospects on your mind

Believe in 6 degrees of separation to your target

Short list

At every opportunity, ask about a connection to the elusive prospect from the volunteer / donor / board member if they know someone on the list





Goodwill
Hunting

Year of ask: 2000

Cause: Goodwill facilities campaign

Donor net worth: \$200 million+

Occupation: Founders of 22 store discount retail chain, both in late 60's (Chuck and Doreen)

Ask amount: \$600,000 outright gift to name a room

Principle: The most important major gift marketing strategy is building relationship networks.



Goodwill Hunting



OUTCOME

2 months later Chuck and Doreen agreed to a \$500,000 and to join the board

1 month later Chuck and Doreen offered \$500,000 in merchandize to sell in the Goodwill stores

As fate would have it, Chuck and Doreen were about to sell their business and take an apartment in Boston and establish a family foundation.

LEARNING POINTS:

Timing is everything.

Everyone is capable of providing a good lead.

Call your donors and talk to them.

Get the donors to "touch" the mission (the tour was quite moving for them)

The traditional 18 month cultivation cycle does not always apply.

Gifts can precede leadership involvement.



Relationship
Management

Guiding principles

Develop long-term meaningful relationships

Continually identify new opportunities for relationship building

Match your donor's interest with your institution's needs and opportunities and create engagement activities

Respect the potential of your donors' multiple interests within the organization. Record the context of these strategies appropriately, in database.



Guiding principles

The relationship manager model with one MGO accountable is the most successful approach for fund raising.

Documentation is essential to professionalism. The transfer of knowledge allows for collegial collaboration and optimization of relationships. (It is your legacy.)

Make the best use of our human resources, involving additional development officers, program managers, volunteers with specialized areas of expertise, as needed, to further a solicitation strategy.

Make closing a gift a mere formality.





Mike in
Manhattan



Year of ask:	1998
Cause:	Diabetes research campaign
Donor net worth:	\$20 million+
Occupation:	Manager of some of Saudi Family wealth
Ask amount:	\$250,000 outright gift
Principle:	Getting to yes may be a bumpy ride--hang on.



Mike in Manhattan



OUTCOME

Mike committed to a \$100,000 gift.

LEARNING POINTS:

Be very choosy when bringing VIPs to a solicitation.

Stuff happens, so use the best technology for up to the minute news.

Take the cue from the donor for access to greater wealth in the family.

Be prepared to resize the expectations and arguments; be flexible.



Ernie and Lee



Year of ask: 2006

Cause: Diabetes researcher

Donor net worth: \$500 million+

Occupation: Major auto dealer

Ask amount: \$1,000,000 given or gotten

Principle: 85% of success in fund raising is based on extraordinary relationship and rapport skills.



Ernie and Lee



OUTCOME:

There was a two year hiatus in interaction;
Ernie is back engaged by the board member
and the researcher.

LEARNING POINTS:

Six points of separation prevails

Use VIP volunteers and staff when needed

Be patient

Getting to YES sometimes means moving past
NO



Key principles



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