



Successful unit fundraising: a checklist and measures

Use your Top 25 as the guide for your major gifts activity.

Remember to review and refresh your Top 25 every month. What are the planned date, purpose, and amount for each solicitation? The Top 25 should be prospects who can and will be solicited for a major gift in the next 6-12 months. Your list should look different by the end of the year!

Tell the story of impact, not needs.

No matter the prospect or intended gift purpose, telling the story of the impact of a potential gift will raise donor sights. Challenge yourself to articulate the impact of the gift at many different levels. How will it impact the institution? The local community? State and national challenges? Global problems? Share the broadest impact first.

Ask and learn about a prospect's philanthropic strategy.

Think of yourself as a philanthropy investment advisor. Help your prospects think about their philanthropy from a strategic vantage point. What impact do they want to make? How does this fit with their family's values? What philanthropy goals do they have? Design your questions before each visit with a prospect to learn more.

A first ask can be a big ask, with proper cultivation.

If you find yourself hedging towards a smaller ask from a highly rated prospect, be sure to ask: "What cultivation or strategic engagement would be needed to make a larger ask?" It is not always true that the road to a larger gift is through smaller "starter" gifts. It is often our own limitations that make us ask for smaller gifts.

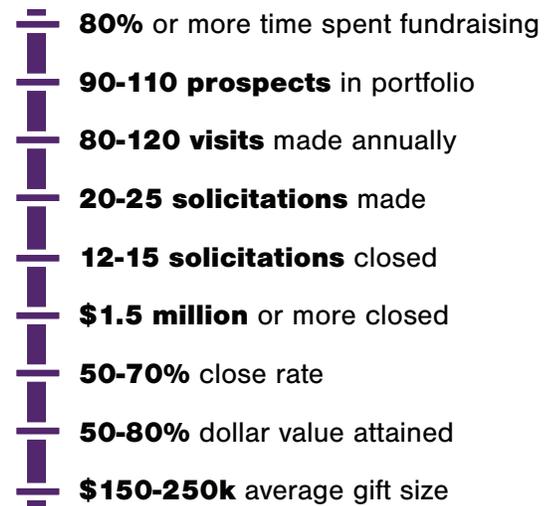
Use a ROI filter in staffing and management decisions.

Every development activity you and your development team are involved with should have direct and meaningful return on your bottom line fundraising results. Audit your roles and responsibilities within the development staff on your team closely to make sure you are getting a high ROI on these important resources. Development staff should spend 80% or more of their time on direct fundraising activity.

Stay focused on major gifts work.

It is always tempting to be pulled into creating program elements in development (events, communications, annual giving societies, committees). These may be important, but don't let these make you lose your focus on major gifts. Major gifts activity in cultivation, solicitation, and closing is your number one priority, always!

Measures of a high-performing major gifts officer:



Major gifts officer productivity levers:

