Watch the webinar here:

https://youtu.be/zYOaptw8YqM

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Think big: major giving for smaller organisations

Paul Dennett, Director of Development, Queenwood School

1. A bit about me

2. Our school's journey

3. Big vs small organisations

4. Strategy for smaller organisations

5. Building your pipeline
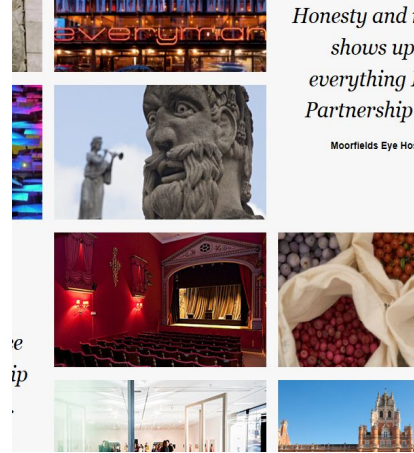
6. Key takeaways

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A bit about me...

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A bit about me

25 years of fundraising

UCL: 8th in the 2020 QS World University Rankings

British Library: largest in the world - 170M items

More Partnership: consultancy

Macquarie University and Hospital

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A bit about me

25 years of fundraising

Jesus College, University of Oxford

Winchester College

YMCA (London, South-West)

Christ's Hospital

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Our school's journey

Queenwood School

A K-12 private school for girls in Mosman, Sydney, Australia

1963

The average annual philanthropic income for UK private schools is more than $1.3m

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Children are the most popular cause that Australians donate towards

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Women are the sole or equal decision-maker about charitable giving in nearly 90% of HNW households
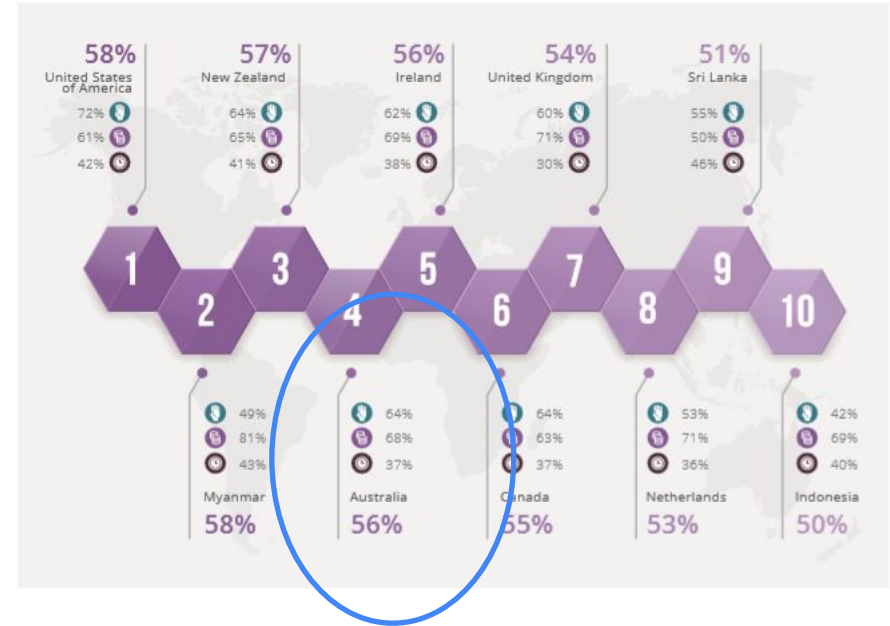
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Women are 26% more likely than men to donate towards children or young people

Australian's among most generous people in the world

Australia #4 in the world

- Three measures of giving:
  - Helped a stranger
  - Donated to charity
  - Volunteered

- Australia and NZ joint #1 in first ever report (2010)

- Australia and NZ have been the most consistent over a decade of reporting

58% United States of America	**57%** New Zealand	**56%** Ireland	**54%** United Kingdom	**51%** Sri Lanka
72%	64%	62%	60%	55%
61%	65%	69%	71%	50%
42%	41%	38%	30%	46%

Myanmar 58%	Australia 56%	Canada 55%	Netherlands 53%	Indonesia 50%
49%	64%	64%	53%	42%
81%	68%	63%	71%	69%
43%	37%	37%	36%	40%

* CAF World Giving Index Oct 2019: 10 years aggregate data

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Big versus small organisations

Some similarities and differences to keep in mind

In a smaller organisation...

- Easier to stay on top of what's going

- Greater influence over culture

- Better access to senior leadership

- Greater scope to be nimble in responding to donor interests and new opportunities

- Smaller audience is simpler to understand and get to know

- Major gifts will be clearly transformational, incentivising donors and colleagues alike

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In a smaller organisation...

But...

- Smaller organisation typically = smaller team + smaller budgets

- You may have fewer funding needs and opportunities, making it hard to match donor interests

- You may be the only person who understands major gifts (fundraising)

- If things go wrong, word spreads and you'll have fewer alternative potential donors to turn to

- Likewise if you have problematic internal processes or relationships, its harder to side-step these

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Strategy for smaller organisations

"I enjoy giving money away. The more you give, the more you get."

Sir Michael Hintze

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Where do you fit in?

The seven steps model for major gift fundraising

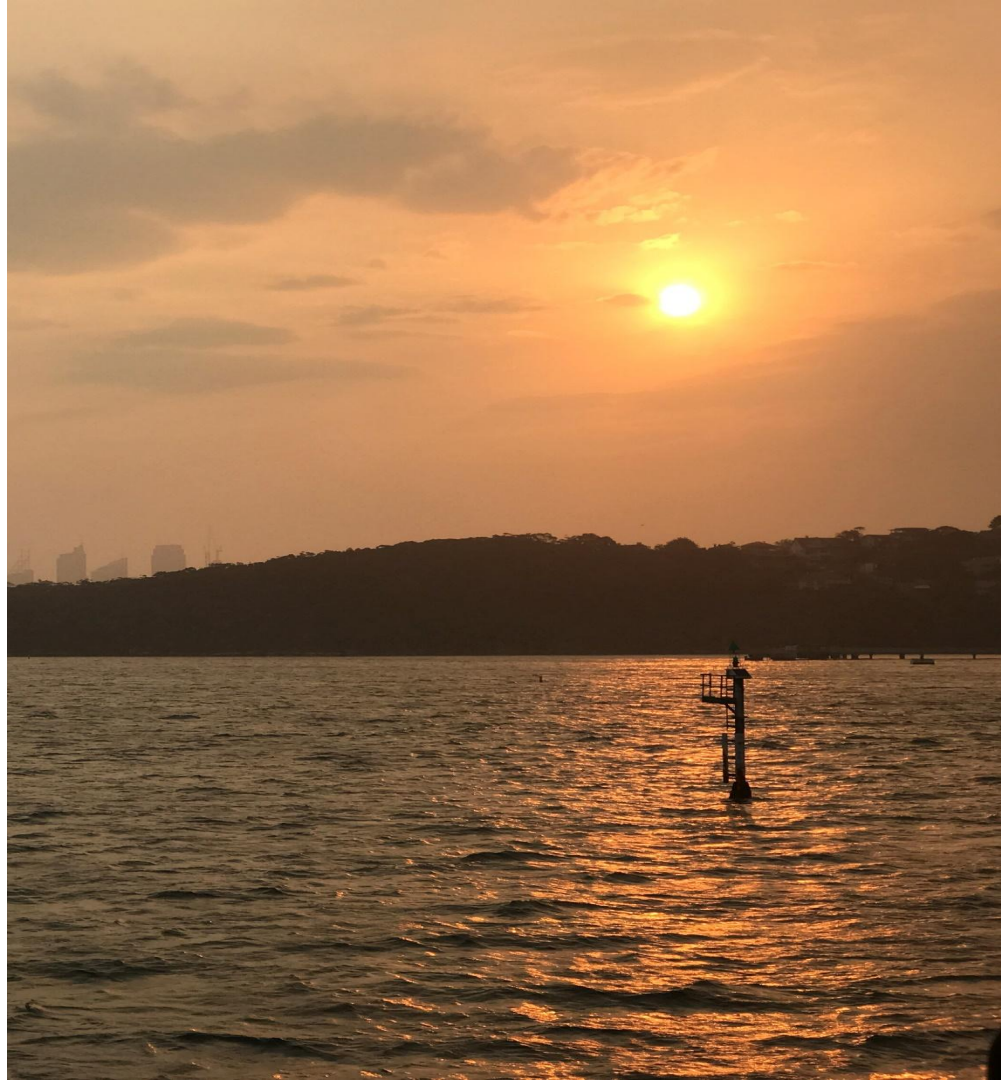| Step |
| --- |
| 1. Identify |
| 2. Research |
| 3. Plan |
| 4. Cultivate |
| 5. Ask |
| 6. Close |
| 7. Steward |

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The two biggest gifts a school receives will account for 40-60% of total funds raised

How big a part will major gifts play for your organisation?

- Do you have an engaged audience (e.g. alumni, members, visitors, ticket buyers) that you can access?

- Are any known to be wealthy, connected to a foundation, or in a position to influence corporate giving?

- Do you have existing donors who you believe have the capacity to do more?

- Do you have a compelling and distinctive case for support?

- Might your cause resonate with philanthropists and grant-makers with no current connection to the organisation?

- Do you have board members or senior volunteers will and able to open doors for you?

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Getting started with major gift fundraising

		2020											2021		
1	Queenwood Fundraising Milestones - as at 30.1.2020														
2		Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb+	
3			TERM 1			TERM 2			TERM 3			TERM 4			Notes
4	**Internal Engagement**														
5	Develop milestones for 2020	■													
6	Introductory 121 meetings with all Leadership Team	■	■												
7	Monday morning Staff Meeting presentations		■				■				■				
8	Introductory 121 meetings with all Governors		■	■											
9	Establish Internal Advisory Group			■											
10	Update reports to Governors				■			■			■				
11	Informal ongoing contact: morning teas; Common Room lunches etc	■	■	■	■	■	■	■	■	■	■	■	■	■	
12	**Funding priorities**														
13	Confirm priority fundraising projects and funding needs	■	■												
14	Introductory 121 meetings with all project champions		■	■											
15	Set philanthropic income targets			■											
16	Update School Case for Support				■	■									
17	Develop case for support for each priority				■	■									
18	**External Engagement**														
19	Review 2020 events and communications calendars; revise if required	■	■												
20	Develop Terms of Reference for a Principal's Advisory Group			■											
21	Recruit first members of Principal's Advisory Group				■	■	■	■							
22	Produce and distribute a philanthropy-focussed newsletter	■	■	■	■	■	■	■	■	■	■				
23	Ongoing: 121 meetings with parents, grandparents, alumnae	■	■	■	■	■	■	■	■	■	■	■	■	■	
24	Attend School events eg Balmoral lectures; QPA cocktails; Foundation Day	■	■	■	■	■	■	■	■	■	■	■	■	■	
25	**Prospect Development**														
26	Create interim prospect management system	■	■												
27	Commission prospect research to help identify top potential donors	■	■	■											
28	Identify top 40 potential major donors		■												
29	Research top 15 prospects; develop bespoke solicitation plans			■	■	■									
30	Major donor engagement			■	■	■	■	■	■	■	■	■	■	■	
31	Research prospects 16-40; develop bespoke solicitation plans					■	■	■							
32	Identify and research prospects 41-60									■	■	■		■	

	Queenwood Fundraising Milestones - as at 30.1.2020	2020										2021		Notes
		Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb+	
			TERM 1			TERM 2			TERM 3			TERM 4			Notes
33	**Fundraising**														
34	Review/implement donation ask on School Fee statements		▓												
35	Winter fundraising appeal				▓	▓									
36	Develop bequest giving strategy					▓	▓								
37	Mid-level gift asks (121) - ongoing					▓	▓	▓	▓	▓	▓	▓	▓	▓	
38	**Policies and procedures**														
39	Finalise 2020 fundraising budget	▓													
40	Review DGR status and options for tax-effective giving		▓	▓											
41	Develop Fundraising and Donations policy		▓												
42	Develop Gift Acceptance policy		▓												
43	Develop Naming Rights policy		▓												
44	Develop donor stewardship matrix			▓											
45	Create register of past 'naming rights' commitments				▓	▓	▓								
46	**Data**														
47	Review data storage and quality; data capture points; Privacy statements	▓	▓	▓	▓										
48	Evaluate SAAS and iWise capabilities for supporting fundraising	▓	▓												
49	Optimise iWise for fundraising, or source alternative software if needed			▓	▓	▓	▓	▓	▓	▓					
50	Develop standardised reports for presenting data on donors and donations									▓	▓				
51	Data capture/update survey to alumnae										▓				
52	**Fundraising materials**														
53	Review printed and online donation forms; update as required	▓	▓												
54	Expand fundraising resources on website			▓	▓	▓									
55	Produce legacy giving flyer						▓	▓							
56	**Personal Development and Training**														
57	Join Educate Plus; attend Annual Conference in Adelaide								▓	▓					
58	Maintain role on CASE fundraising benchmarking Editorial Board	▓	▓	▓	▓	▓	▓	▓	▓	▓	▓	▓	▓	▓	

Building your pipeline

Identifying your potential major donors

- Start by asking your colleagues

- Review any existing donors

- Screen your database

- Outsource to consultants

- Ask everyone you meet to make suggestions

- Keep an eye out for clues!

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Key takeaways

Remember...

1. Manage your time: it's the big gifts that count

2. Build understanding internally; manage expectations

3. Invest in data and a good CRM

4. Consider a feasibility study

5. Create opportunities for face-to-face engagement

6. Draw on colleagues' knowledge; ask supporters too

7. Look out for yourself and...

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...have fun!

Questions?

How ToucanTech facilitates major giving, for any organisation size

- **Email engine**: Engage your prospects with tailored emails using the email engine, including pre-designed templates to choose from, & live website content integration

- **Integrated community portal**: Bring your supporters together online with a personalised & private portal to keep up-to-date on news, events & alumni

- **Activity tracker**: Track what your community members engage with, from email clicks to event sign ups, to provide a picture of interests & affinity

- **Online giving through one off or regular payments**: Offer your prospects a way to give their first donation online, capture contact details & track donations

- **Donor pipeline**: Track advancement using the donor pipeline, a vital tool to visualise your progress with prospects & enable actions to encourage conversion to donor

About ToucanTech

ToucanTech is an easy, affordable and beautiful fundraising CRM and website software to manage your supporter records, email newsletters, online payments, events, mentoring, careers and more!
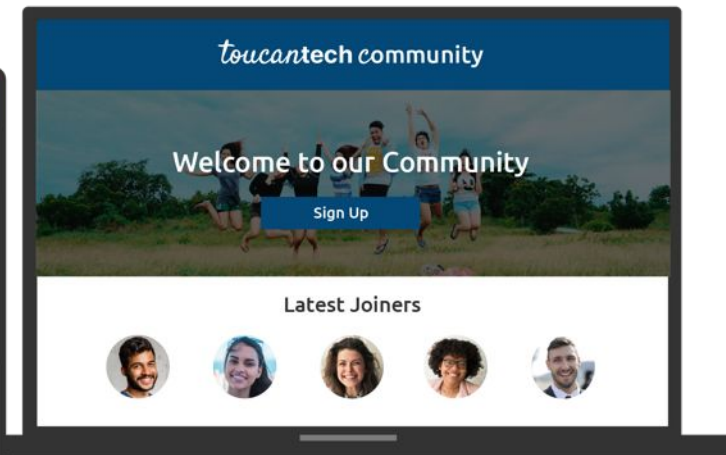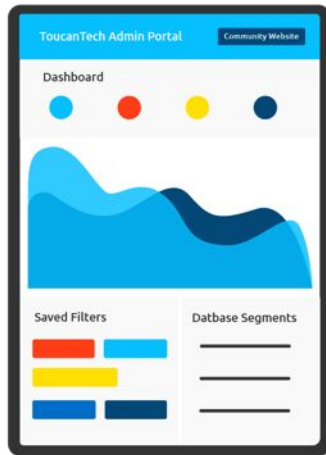
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