

# AN INTRODUCTION TO MAJOR GIFTS

## What is a Major Gift?

A major gift can truly be any gift that is significant to the donor and/or to your organization. Don't limit yourself with a particular dollar value but think about the impact the gift will make for your organization. This could be \$1,000 to \$5,000 or more. Major gifts should be transformative and create opportunities for the organization

## Relationship Building for Major Gifts

- Relationships with major gift donors require attention, they should have one-on-one attention with clear plans for building and growing the relationships between the donor and the organization.
- Many major gift donors, and prospective donors, come from a strong and well-developed annual giving fund. Your annual giving fund is an introduction of your organization to a wide range of donors.
- The most effective way to build strong one-on-one relationships with donors is to focus on personalized communication with targeted follow-up. For example, an introductory letter, followed by a phone call, then an in-person meeting is a strong pathway to building relationships.
- Although you are building a strong relationship with the individual donor, remember to always connect the donor back to the organization and the organizational needs.

**balanced  
good.**

Those who are closest to the organization are the most likely to give. These are the individuals who care the most. Always start with those who are known to your organization, who have given previously, or have a strong connection with your cause.



LET'S CONNECT!

519.774.2282

[lacey@balancedgood.com](mailto:lacey@balancedgood.com)

[www.balancedgood.com](http://www.balancedgood.com)

# AN INTRODUCTION TO MAJOR GIFTS

## Who is a Major Gift Donor?

- Major Gift donors are those who want to “invest” in the organization, community, or greater good, and have the financial resources to make a significant contribution.
- To help identify a major gift donor, look to:
  - **Linkage:** How is the donor connected to the organization? The closer to the organization, the more likely they would support the organization. For example, beneficiaries of the organization, family of someone who has been impacted by the organization, or volunteers.
  - **Interest:** Does the donor have a specific interest in your cause? Have they supported similar organizations in the past?
  - **Ability:** Does the donor have the financial resources to make a significant gift? Assess their career status, real-estate investments, past giving trends, and general wealth indicators..

## Building a Strong Donor Relationship

1. Letter of Introduction (if donor is unknown to you). Use a mutual contact to send this letter, such as a board member or key volunteer.
2. Follow-up phone call or e-mail. This can include the key volunteer, but it doesn't have to. Ideally your pathway to engagement is outlined with your key volunteer if this is the approach you are taking.
3. One on one meeting (ideally a tour of organization if applicable) in person or virtually. Try to create a follow-up action that might “stick” with the donor, for example promise to send additional information the donor shows interest in.
4. A follow-up thank you note, including any follow-up items promised. Preparing a proposal/getting ready for “The Ask”
5. Asking a donor to make a major gift is not easy, but it is best to do this in person (or virtually if required).

# The Most Important Part: Reporting Back on the Donor's Impact

Confirming a major gift is truly the first major step in the process. As a fundraiser, it is your responsibility to report back to the donor and be a good steward of their funds. As the funds are being used be sure to let the donor know how the funds are being spent. This is a great time to share milestones, whether it's a quick photo of blueprints, a happy program client (with client permission), or impactful testimonials.

Try to include key volunteers, such as Board Members, in the thank you process. A call from a Board Member in addition to a formal thank you process, and letters is important.

Remember, stewardship is an ongoing process. The strength of your impact reporting directly relates to the strength of your donor relationships.

## LET'S CONNECT!

519.774.2282

[lacey@balancedgood.com](mailto:lacey@balancedgood.com)

[www.balancedgood.com](http://www.balancedgood.com)

## AN INTRODUCTION TO MAJOR GIFTS

### How do you ask for a significant gift?

It is not easy, but remember a few key things: be direct, outline the need and ask for a specific amount. Once you ask, stay quiet and let the donor be the first one to speak

### What if the donor says "No"?

It's okay! Take the time to thank them and ask if this is something that can be revisited in the future. Take this as an opportunity to learn, perhaps the project wasn't the right fit, or the donor has some other financial obligations right now. In any case, keep the relationship up and thank the donor for the opportunity to discuss the organization with them.

### What if the donor says "Yes"?

Congratulations! First and foremost, express your authentic and genuine gratitude. You will also want to confirm the logistical details of the gift with a gift agreement. How would the donor like to be recognized, arrange payment details (will the gift be pledged or paid outright, will the gift be made by cheque, gift of securities, wire transfer).



balanced  
good.



Say thanks with  
passion



Show your donors  
their impact



Connect to your donor's  
values and emotions



Share inspiring  
stories

## STEWARDSHIP YOUR MAJOR GIFT DONORS

Keeping Donors Happy and Inspired

### What is Stewardship?

Stewardship is ensuring your donor understands the impact of their gift, feels love and gratitude from the organization, and trusts that their funds are being used as they had requested. This is the greatest opportunity to strengthen your relationship with your donor and continue to connect them to your cause.

### What is "Good" Stewardship?

- It starts the moment the donor makes the gift. Pick up the phone and thank them, ensure timely mailing of thank you letter/card and tax receipt.
- Engages board members, programming staff, or other volunteers. Major gift donors should hear from your Board of Directors, whether it's a thank you call, handwritten card, or live signature on a thank you letter.
- It ensures the funds donated were used for their intended purposes, and keeps donors informed on the progress of the project or program area that they have funded.
- It involves continuous communication and education with the donor on the impact of their support.
- Is customized to the donor, their reasons for giving, and highlights the impact their support is making.
- It aligns with the values of your organization and protects the rights and safety of the people that rely on your programs and services.

LET'S CONNECT!

519.774.2282

[lacey@balancedgood.com](mailto:lacey@balancedgood.com)

[www.balancedgood.com](http://www.balancedgood.com)

balanced  
good.

# STEWARDING YOUR MAJOR GIFT DONORS

Keeping Donors Happy and Inspired

## Make it Thoughtful and Personal

- When creating a stewardship plan, get to know your donor. It's okay to ask, "how would you like to be recognized for your support?"
- Stewardship happens in a variety of ways: a handwritten note from a client or organizational beneficiary, lunch with a board member, a photo of blueprints or equipment being delivered, sending personal notes on important dates for donor or organization (eg. 1-year anniversary of gift being made, donor's birthday).
- Make it "sticky", provide examples of their gift's impact that includes memorable details.
- Speak to the donor's reason for giving (in honour or in memory of a loved one, to make lasting social change, to repay an organization, etc.)

## Creating a Template for Personalized Stewardship

- Outline your key stewardship goals, timelines, and milestones.
- Add everything in your stewardship plan to your database and use your database or calendar to build in reminders for touchpoints.

## Stewardship Plan Template

Donor Name: \_\_\_\_\_ Gift: \_\_\_\_\_

Gift Date: \_\_\_\_\_

Gift Purpose: \_\_\_\_\_

Pledge Details (if applicable): \_\_\_\_\_

Thank You Letter: \_\_\_\_\_ Receipt: \_\_\_\_\_ Personal Note: \_\_\_\_\_

Tour: \_\_\_\_\_ Lunch: \_\_\_\_\_ Phone Call: \_\_\_\_\_

Reporting Requirements: \_\_\_\_\_

\_\_\_\_\_

What is Meaningful to this Donor: \_\_\_\_\_

\_\_\_\_\_

Key Dates for Stewardship Activity:

Date: \_\_\_\_\_ Activity: \_\_\_\_\_

Date: \_\_\_\_\_ Activity: \_\_\_\_\_

Date: \_\_\_\_\_ Activity: \_\_\_\_\_

Date: \_\_\_\_\_ Activity: \_\_\_\_\_

Staff Lead(s): \_\_\_\_\_

Volunteer Lead(s): \_\_\_\_\_

balanced  
good.