MAKING A MAJOR IMPACT WITH A MAJOR GIFTS PROGRAM

Presented by Bill Connors, CFRE
“Bill will discuss the benefits of a major gifts program as well as how to manage your program within The Raiser’s Edge—with and without the RE:Search module.”

“Does your organization have a major gifts program or are you just telemarketing for big donations? Join Bill Connors as he explains how to leverage The Raiser’s Edge to create an intentional major gifts program. He will discuss what you can do in The Raiser’s Edge both with and without the RE:Search module and talk about how the new version of The Raiser’s Edge, version 7.92, can have a positive impact on your major gifts efforts.”
AGENDA

• Introduction
• Some concepts about major gifts fundraising
• Introduction to RE:Search
• Walk through The Raiser’s Edge with and without RE:Search
• Resources
• Questions and answers
WHY DO MAJOR GIFTS FUNDRAISING?

• A lot of money can be raised through direct mail and special events, but
  - They are very expensive ways to raise money
  - So expensive, in fact, they are often justified by their contribution to major gifts fundraising

• We know it’s how the “big money” is raised
  - Capital campaigns
  - Universities
  - Hospital foundations
SOME THINGS TO KNOW

• A course on major gifts fundraising could be three days long—I’ve been to one.

• A course on setting up and managing major gifts in The Raiser’s Edge could be a full day itself—I teach them.

• We’re going to assume you basically know what major gifts are, what major gifts fundraising is, and have a good sense of why it’s important. We’ll only talk about some foundational concepts for today’s seminar.

• The focus of today’s seminar is about The Raiser’s Edge, specifically, managing major gifts fundraising in The Raiser’s Edge with and without the RE:Search option module.
• An organization can define a “major gift” however it wishes. The typical threshold I see among most organizations using The Raiser’s Edge is $1,000, but often it can be much more.

• However: Getting a major gift ≠ Major gifts fundraising

• Also: Major gifts fundraising ≠ “moves management”

• And: Major gifts fundraising ≠ RE Action Tracks
“MOVES MANAGEMENT”

• Objectives
• “Moves”
  - Foreground vs. background moves
• Prospect
• “Natural Partners”
• “Primary Player”
• “Secondary Player”
• “Moves Manager”
SEVEN STAGES

1. Identification
2. Research
3. Strategy
4. Cultivation
5. Solicitation
6. Negotiation
7. Stewardship
CREDITS

• Moves Management®: Bill Sturtevant and the Institute for Charitable Giving (www.instituteforgiving.org)

• Seven Stages of a Major Gifts Prospect: Brakeley Briscoe (www.brakeleybriscoe.com)
MAJOR GIFTS FUNDRAISING IN THE RAISER’S EDGE

Identification

• Prospect Strategy meeting
  – Run profiles based on status of “1-Identification”
  – Review prospects
  – Drop prospect or assign to research
• Drops, now or later
  – Change status to “Dropped”
  – Add a note explaining reason for identification and dropping

• Chapter 6, “Major Gifts and Grants”:
MAJOR GIFTS FUNDRAISING IN THE RAISER’S EDGE

- Blackbaud website, Support Forums, RE, Shared Client Documents
THE SALES PITCH

- You **should** be using The Raiser’s Edge for major gifts fundraising, **not** spreadsheets

- Major gift prospect data should be in The Raiser’s Edge for mailings, both for inclusion and exclusion purposes

- Data kept in spreadsheets is not kept in synch with data in RE

- Spreadsheets are not databases—no security, easy to make sorting mistakes, easy to overwrite data…
EVERYONE HAS

• Constituents
• Relationships
• Assigned Solicitors
• Notes
• Actions
RE:SEARCH MODULE

RE:Search = Research = Prospect Research = Prospect Research and Prospect Management
WHAT THE RE:SEARCH MODULE PROVIDES

1. Prospect tab for individual and organization constituent records

2. Reports
   a. “Prospect research” reports
   b. Prospect tab data for Profiles

3. Dashboard “Proposal” panels
WITHOUT THE RE:SEARCH MODULE

• More use of Notes and Attributes
• More use of Query and Export
• Ratings tab in Constituent records (7.92)

• And if you add the module later, work to change your policies and procedures and move your previous data into the new functionality
TOUR OF RE WITH AND WITHOUT RE:SEARCH

• Robert Hernandez with RE:Search, Mark Adamson without RE:Search
  - Each branch of the tab
  - Special attention to The Giving Score with 7.92

• Giving Score queries

• Report examples

• Dashboard examples
GIVING SCORE (NEW FOR MOST WITH 7.92)
GIVING SCORE WITHOUT RE:SEARCH
"PROPOSAL" WITH RE:SEARCH
WHAT THE RE:SEARCH MODULE PROVIDES

1. Prospect tab for individual and organization constituent records

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3. Dashboard panels
• More use of Notes and Attributes
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• And if you add the module later, work to change your policies and procedures and move your previous data into the new functionality
GET RE:SEARCH?

- The RE:Search module is not necessary in order to do major gifts fundraising with The Raiser’s Edge. If you’re just starting out, you can use the core product. However, you should consider the RE:Search module if:

  - You do have a serious major gifts fundraising program and want to have the right tools to do the job rather than jury-rigging some of the most critical data related to the process; this is especially true if you’re managing your major gifts data in spreadsheets—you really should have that data in the database and the RE:Search module gives you the best reports to get that data out with the Dashboard panels.
GET RE:SEARCH?

Or:

- You don’t yet have a major gifts fundraising program, or serious one, but you plan to. Sure, you can get started without RE:Search and add it later, but that’s going to potentially be a lot of work and re-work to implement that later and move the data from the core product into the RE:Search module—do you really want to have to do the work to move all of the data that is in notes, attributes and elsewhere into the module? Do you really want to have to re-develop, re-learn and re-implement your major gifts fundraising policies and procedures?
FURTHER RESOURCES


Q&A AND CONTACT INFORMATION

Bill Connors, CFRE

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