

MAJOR DONORS FOR DIOCESES

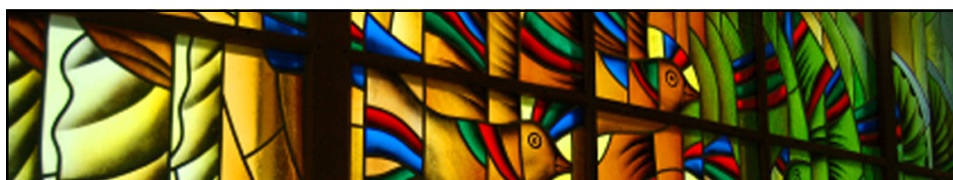
Introduce Yourself!

In the chat log on the right, type your diocese and position or involvement.

Examples: Diocese of NY, canon to the ordinary

Diocese of Northern CA, trustee

Diocese of Atlanta, no diocesan position, just interested



MAJOR DONORS FOR DIOCESES

Connecting with your financial visionaries

An Introductory Webinar

Terri Mathes, Senior Program Director

(717) 599-0627; tmathes@episcopalchurchfoundation.org

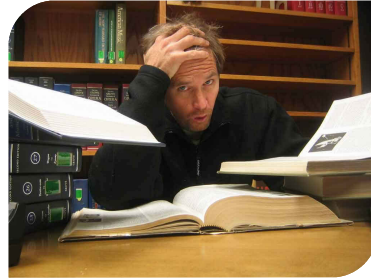
May 13, 2014





What We'll Cover

- ECF's mission
- Identifying & cultivating your donors
- When & how to ask for a major gift
- The role of the bishop
- What your donors say



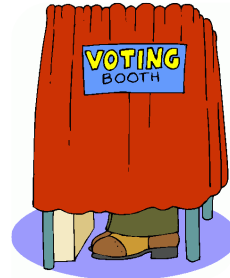
Strengthens the leadership and financial capabilities of Episcopal congregations, dioceses and communities of faith to pursue their mission and ministry



First, a poll:

Please indicate the largest gift you have:

- Asked for
- Received



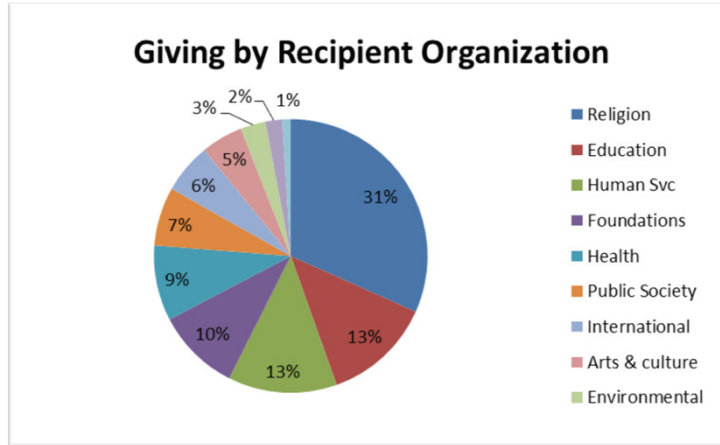
Identifying Your Donors

Giving by Source





Where do They Give?



Why do They Give?

Traditionalists: born before 1946

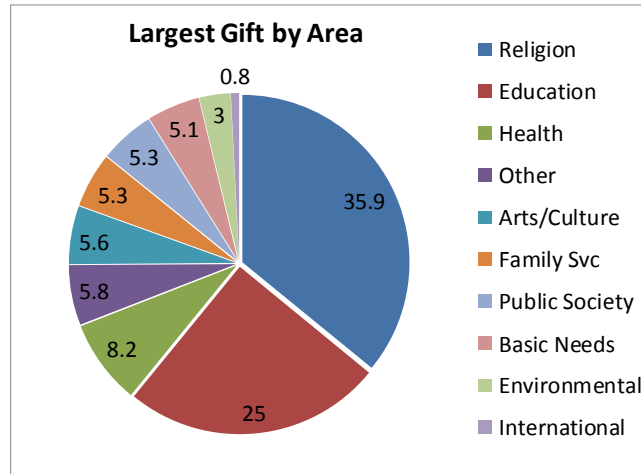
- Faith in institutions
- Motivated by duty
- Think in terms of legacy

New Philanthropists: born 1946 or later

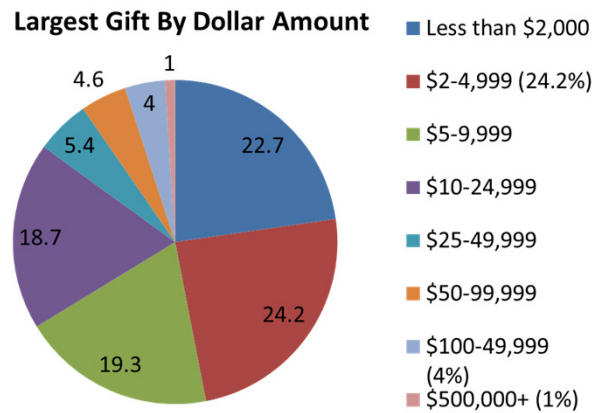
- Distrust of institutions
- Motivated by impact
- Think in terms of results

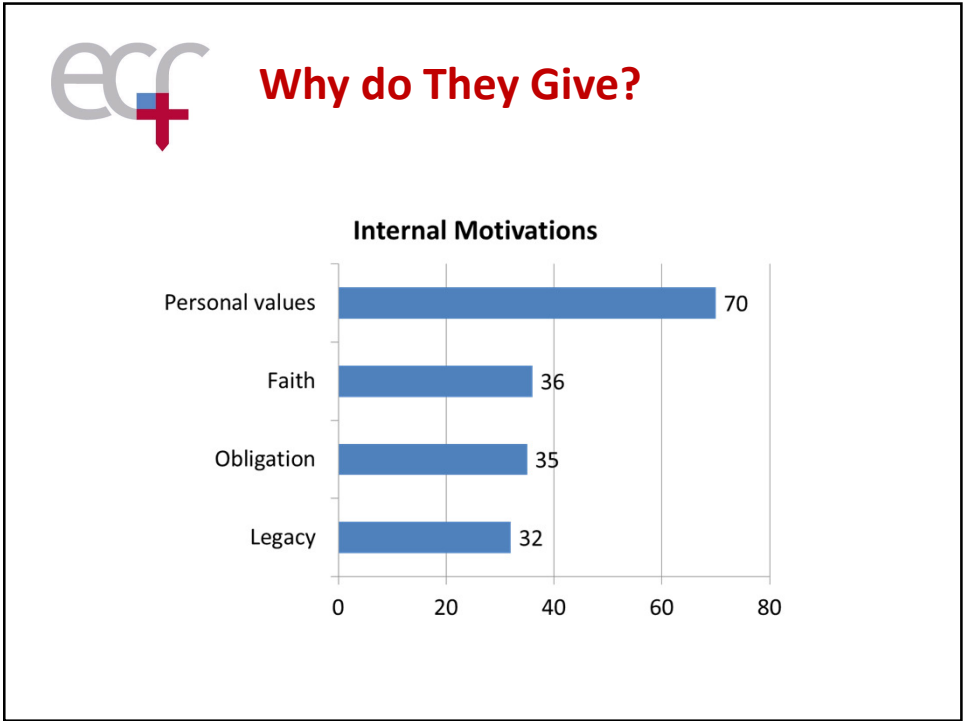


Where do They Give?



How Much do They Give?







Why do They Give?

- Public-society benefit, up 3%



Why do They Give?

- Public-society benefit, up 3%
- International aid, up 6.9%





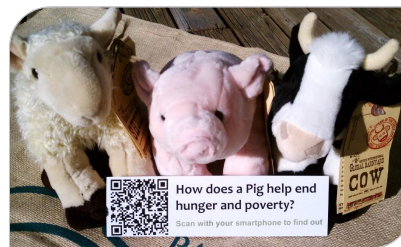
Why do They Give?

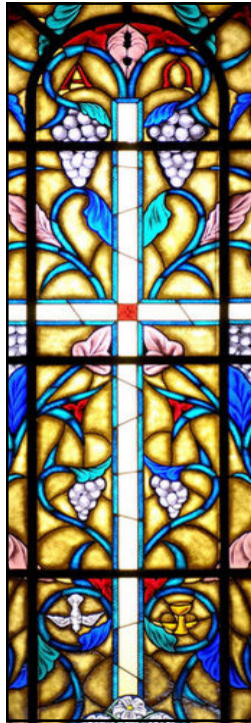
- Public-society benefit, up 3%
- International aid, up 6.9%
- Health, up 4.6%



Why do They Give?

- Have the **power**
- **Change** the world
- **Save** a life





Why do they Give?

What your own donors had to say:

- “I believe strongly in the vision the gift financed and its potential to provide long-term benefits to the diocese and the community.”
- “[We] wish to help the institution be a better place.”
- “The most important part of our gift was the direct impact it had”



Questions?

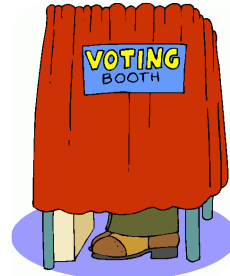




Another poll:

Our annual giving program includes (check all that apply):

- Direct mail appeal
- Email appeal
- Gatherings with donors
- Personal visits to donors
- We have appeals for special projects or ministries
- We have no annual giving program



Where to find them

Use your annual fund

- Spread your vision
- Tell stories of impact
- Build relationships
- Identify new donors





Where to find them

Starting from scratch

- Special appeals
- Diocesan institutions
- Staff/rector input
- Ministry days, workshops, etc.



Where to find them

A word about wealth scanning services

- Fishing expeditions
- “False positives”
- Inspiring parish cooperation





How to involve them

Prepare

- Clarify your mission
- Develop measurable goals
- Collect those stories of impact!
- Create avenues for participation



How to involve them

Get to know them

- Over 70% have a strategy for giving
- How does your mission align?
- About 60% have a budget for giving
- Where do you rank as a priority?






How to involve them

Get to know them

- Power Breakfasts & Talent Luncheons
- Bishop's Associates or Council of Advice
- Diocesan Council, Trustees, Endowment boards, etc.
- The role of prospect research

Another poll:

We have high capacity individuals on our fiscal board:

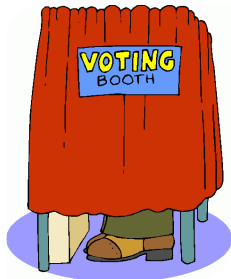
- Yes
- No
- Don't know

On our governing board:

- Yes
- No
- Don't know

We have a legacy society

- Yes
- No
- Don't know





Staying in touch

Major Gifts calendaring

- Your competition
- Tracking prospects



Staying in touch

Thinking about formation

“Whether we are asking for money or giving money, we are drawn together by God, who is about to do a new thing through our collaboration.”

-- Henri Nouwen





Staying in touch

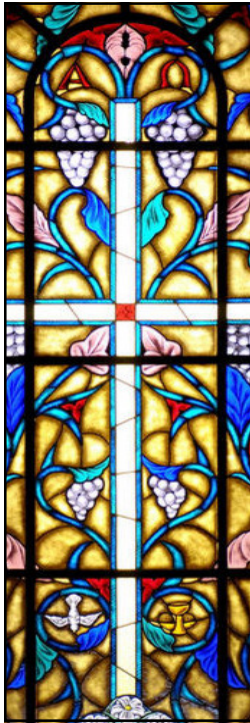
Plan on:

- As many significant contacts as there are zeros in the ask
- As many follow-up/thank you contacts before the next ask



Questions?

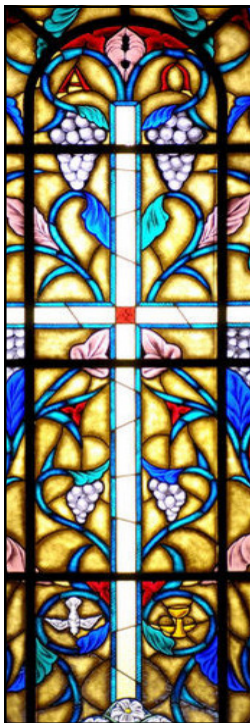




Making the ask

Have you:

- Identified capacity and interest
- Involved them in your plans
- Identified their passions
- Educated them about the impact

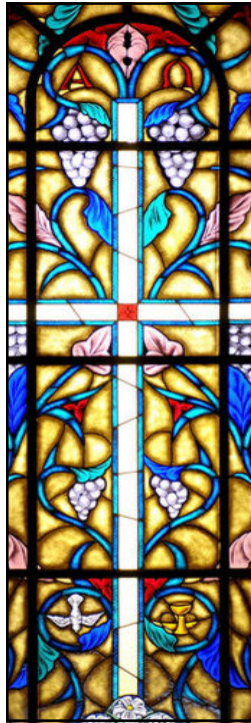


Making the ask

Some best practices:

- Face to face visit
- Send the bishop
- Focus on the donor, the project, the impact; not the need

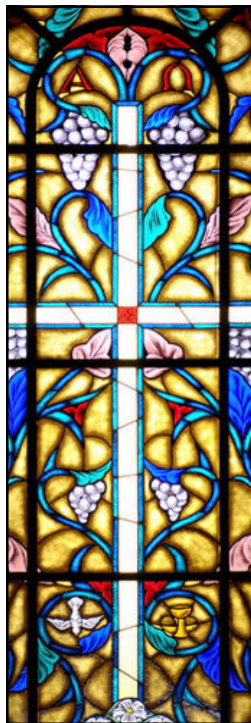




Making the ask

The critical components:

- The donor's passions (from the heart)
- Project's impact (change the world)
- The specific way they can be involved

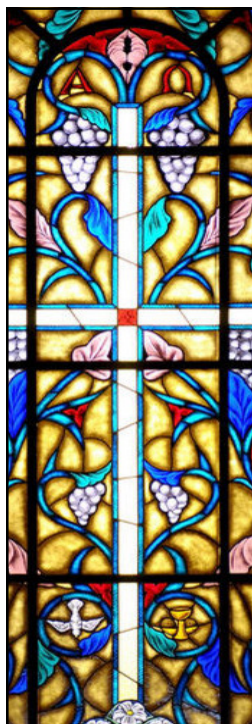


Making the ask

Closing the call

- Keep the ball in your court
- Confirm amount & terms in writing
- Say thank you





Making the ask

Say thank you some more

- Photos of progress, impacts
- Updates on construction or new program
- Quick email
- Industry standard: thank them 7 times (Sounds Biblical, doesn't it?)



Great Reads

The Spirituality of Fundraising
by Henri Nouwen
www.henrinouwen.org

*Not Your Parents'
Offering Plate*
by Clif Christopher





Questions?

- Terri Mathes:
tmathes@episcopalfoundation.org
- Louise Baietto:
lbaietto@episcopalfoundation.org
- Or call: (800) 697- 2858



Upcoming Web Conferences

Basics of a Capital Campaign

May 14th, 7:00-8:00 pm EDT

What is Vital Teams?

May 15th, 7:00-8:00pm EDT

Invite*Welcome*Connect:

Building a Vital Ministry

May 27th, 7:00-8:00pm EDT

Planning and Recruiting for Stewardship

June 4th, 7:00-8:00pm EDT

Check EVENTS on our website for more webinars and workshops:
www.episcopalfoundation.org