

Major Gifts: Development of a Total Plan

- Set a target--preliminary major-gifts goal: what you want and need to raise.
- Rate and evaluate all previous donors and new prospects for potential giving in the various categories you develop as "memberships" for annual giving or "named" opportunities for capital and endowment campaigns.
- Develop a gift table of amounts of contributions and numbers of prospects related to each level. Decide where the cutoff point will be for what you will consider to be a major gift.
- Settle on the official and public campaign goal.
- Develop divisional goals for trustees, other individuals, corporations, and foundations.
- Recruit a campaign chair/co-chairs and a solicitations committee. Divide the number of prospects by five or six to determine the number of solicitors needed.
- Settle on the benefits, privileges, and named opportunities--the perks--for donors and what specific things the respective gifts will "buy" for the good of the organization.
- Produce a written and compelling case for support.
- Print solicitation materials as needed--pledge cards or gift return envelopes, letterhead, etc.
- Develop a publicity/communications plan.
- Secure pre-campaign leadership and matching gifts.
- Prepare full donor-prospect files containing all available information, including any previous support of the organization, and share those files with the appropriate solicitors.
- Have kickoff meeting of the campaign committee so that each member can select/be assigned prospects for personal solicitation, and provide solicitation training for committee members.
- Send letter signed by the committee chair to all prospects stating the reason for the campaign and introducing the solicitor who will call on each.
- Have periodic meetings of the committee for progress reports and other possible prospect assignments.
- Throughout the campaign quickly record and acknowledge received gifts and pledges.
- Schedule regular meetings, site visits, entertaining, etc. with top tier prospects for cultivation and solicitation.
- Constantly review progress and make evaluations, corrections, and projections.
- Have "final report" meeting and complete and track all remaining solicitations.
- End the major-gifts campaign.
- Host a donor and volunteer recognition event.
- Assure delivery of all the perks and benefits promised to donors.
- Assess and review what worked and what didn't and write report that will be a resource for next campaign.
- Continue to carry out ongoing cultivation and stewardship of donors.