

NAYDO

North American YMCA Development Organization



Inspires and strengthens the philanthropic culture of the YMCA

Major Gifts: Your Pathway to a Successful and Meaningful Annual Campaign

Presented by: Panas, Linzy & Partners, LLC

May 20, 2021

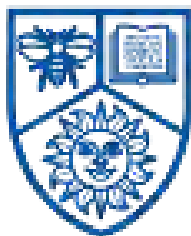


Presenters

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Inspired Fundraising Solutions

Overview

- **Major Gifts-Definition, Assumptions, and Trends**
- **Recipes for Success-Donor Identification, Cultivation, Solicitation, Recognition, and Stewardship**
- **Donor Cycle-best practices**
- **Group Work-breakouts**
- **Questions**

**BE THE
CHANGE**
VOLUNTEER &
MAKE THE DIFFERENCE



Major Gifts-Organizational Definition

- YMCAs throughout the United States determine differently what constitutes Major Gift status...
- Work with your Financial Development and volunteer team to come up with your definition.
- Traditionally, the \$1,000 gift level is the base level.



Major Gifts

- Annual Campaign success depends on a robust Major Gifts endeavor.
- Enables your organization to pre-load your Annual Campaign with a large percentage of campaign dollars already raised.
- Donors give to successful and philanthropically responsible organizations.



Major Gifts

- Gives the donor an opportunity to participate, have increased impacts and be recognized for their contribution.



\$50

Offers a child lifesaving skills through swim lessons

ANNUAL CAMPAIGN
The Y. So Much More™

\$150

A team of children with special needs enjoys the experience of a team sport through Miracle League

\$300

Two children gain skills and confidence at day camp

\$552

A single Parent joins the Y and spends time there each week with their children

\$1000

A child has a safe place to go after school through School Age Care

The Power of Numbers: The 80/20 Rule

- Strive to work towards the Annual Campaign metric of 20% of your total donors make up 80% of your total dollars raised.
- Trends: strive towards the 90/10 in today's philanthropic environment...



The 80/20 Rule

- Enables the staff and volunteer team to focus on a much smaller group of donors and donor prospects to really move their Annual Campaign in a positive growth direction.
- Engages and educates volunteers, donors, and community stake-holders in understanding the YMCA's charitable mission, impacts , numbers served, and collaborations.
- Sources new Major Donors from an existing and committed donor base.

The Power of Numbers: 80/20 Rule

Campaign Morphology: An actual campaign

Campaign	# Gifts: <\$999	% of Total Gifts	Dollars	% of Total \$	# Gifts: \$1,000+	Dollars	% of Total Gifts	% of Total \$	Total-All Gifts	Average Gift- <\$999	Average Gift- >\$1,000	Average Gift- Overall	Total Raised	\$ Gain over Previous Year	% Gain over Previous Year
2021	266	82.35%	\$41,547	29.48%	57	\$99,400	17.65%	70.52%	323	\$156.19	\$1,743.85	\$436.37	\$140,947	Base Year	Base Year
2022	292	83.67%	\$45,607	31.45%	57	\$99,400	16.33%	68.55%	349	\$156.19	\$1,743.85	\$436.37	\$145,007	\$4,061	103%
2023	321	84.92%	\$50,137	33.53%	57	\$99,400	15.08%	66.47%	378	\$156.19	\$1,743.85	\$436.37	\$149,537	\$4,530	103%
2024	353	86.10%	\$55,135	35.68%	57	\$99,400	13.90%	64.32%	410	\$156.19	\$1,743.85	\$436.37	\$154,535	\$4,998	103%
2025	388	87.19%	\$60,602	37.88%	57	\$99,400	12.81%	62.12%	445	\$156.19	\$1,743.85	\$436.37	\$160,002	\$5,467	104%
2026	427	88.22%	\$66,693	40.15%	57	\$99,400	11.78%	59.85%	484	\$156.19	\$1,743.85	\$436.37	\$166,093	\$6,091	104%
														25146.59	

Example of Annual Campaign with 10% Annual Growth in number of donors <\$999.00 over 5 years...

Outcomes:

- Average % dollar growth over 5 years---3.5%.
- Average \$ growth over 5 years---\$5,000+ annually.
- Increased work for larger number of smaller gifts

The Power of Numbers: 80/20 Rule

Campaign Morphology: An actual campaign

Campaign	# Gifts: <\$999	% of Total Gifts	Dollars	% of Total \$	# Gifts: \$1,000+	Dollars	% of Total Gifts	% of Total \$	Total-All Gifts	Average Gift- <\$999	Average Gift- >\$1,000	Average Gift- Overall	Total Raised	\$ Gain over Previous Year	% Gain over Previous Year
2021	266	82.35%	\$41,547	29.48%	57	\$99,400	17.65%	70.52%	323	\$156.19	\$1,743.85	\$436.37	\$140,947	Base Year	Base Year
2022	266	80.85%	\$41,547	27.44%	63	\$109,863	19.15%	72.56%	329	\$156.19	\$1,743.85	\$436.37	\$151,409	\$10,463	107%
2023	266	79.40%	\$41,547	25.67%	69	\$120,326	20.60%	74.33%	335	\$156.19	\$1,743.85	\$436.37	\$161,872	\$10,463	107%
2024	266	77.78%	\$41,547	23.87%	76	\$132,533	22.22%	76.13%	342	\$156.19	\$1,743.85	\$436.37	\$174,079	\$12,207	108%
2025	266	76.00%	\$41,547	22.10%	84	\$146,483	24.00%	77.90%	350	\$156.19	\$1,743.85	\$436.37	\$188,030	\$13,951	108%
2026	266	74.30%	\$41,547	20.57%	92	\$160,434	25.70%	79.43%	358	\$156.19	\$1,743.85	\$436.37	\$201,981	\$13,951	107%
														61034.2	

Example of Annual Campaign with 10% Annual Growth in number of MG donors >\$1,000.00 over 5 years...

Outcomes:

- Average % dollar growth over 5 years---7.5%.
- Average \$ growth over 5 years---\$12,000+ annually.
- Focus on much smaller of higher end gifts, very achievable.

The Power of Numbers: 80/20 Rule

Campaign Morphology: An actual campaign

Campaign	# Gifts: <\$999	% of Total Gifts	Dollars	% of Total \$	# Gifts: \$1,000+	Dollars	% of Total Gifts	% of Total \$	Total-All Gifts	Average Gift- <\$999	Average Gift- >\$1,000	Average Gift- Overall	Total Raised	\$ Gain over Previous Year	% Gain over Previous Year
2021	266	82.35%	\$41,547	29.48%	57	\$99,400	17.65%	70.52%	323	\$156.19	\$1,743.85	\$436.37	\$140,947	Base Year	Base Year
2022	266	80.85%	\$41,547	19.93%	63	\$166,950	19.15%	80.07%	329	\$156.19	\$2,650.00	\$436.37	\$208,497	\$67,550	148%
2023	266	79.40%	\$41,547	19.89%	69	\$167,325	20.60%	80.11%	335	\$156.19	\$2,425.00	\$436.37	\$208,872	\$375	100%
2024	266	77.78%	\$41,547	19.20%	76	\$174,800	22.22%	80.80%	342	\$156.19	\$2,300.00	\$436.37	\$216,347	\$7,475	104%
2025	266	76.00%	\$41,547	19.06%	84	\$176,400	24.00%	80.94%	350	\$156.19	\$2,100.00	\$436.37	\$217,947	\$1,600	101%
2026	266	74.30%	\$41,547	19.20%	92	\$174,800	25.70%	80.80%	358	\$156.19	\$1,900.00	\$436.37	\$216,347	-\$1,600	99%
														\$75,400.00	

Example of Annual Campaign that has achieved the 80/20 benchmark for Major Gift donors over 5 years...

Outcomes:

- Average % dollar growth over 5 years---10.4%.
- Average \$ growth over 5 years---\$15,000+ annually.
- Focus on much smaller of higher end gifts, and advancing the average gift number.

Recipes for Success

Increasing Your Major Donor Base:

- Fruit on the ground-create strategies designed to move those lower level donors (\$250+) to the MG level over time.
- Utilize your volunteer Board members to provide a constant source of new Major Gift donor prospects. This is a big part of their responsibilities as a board member...



Recipes for Success

Increasing Your Major Donor Base:

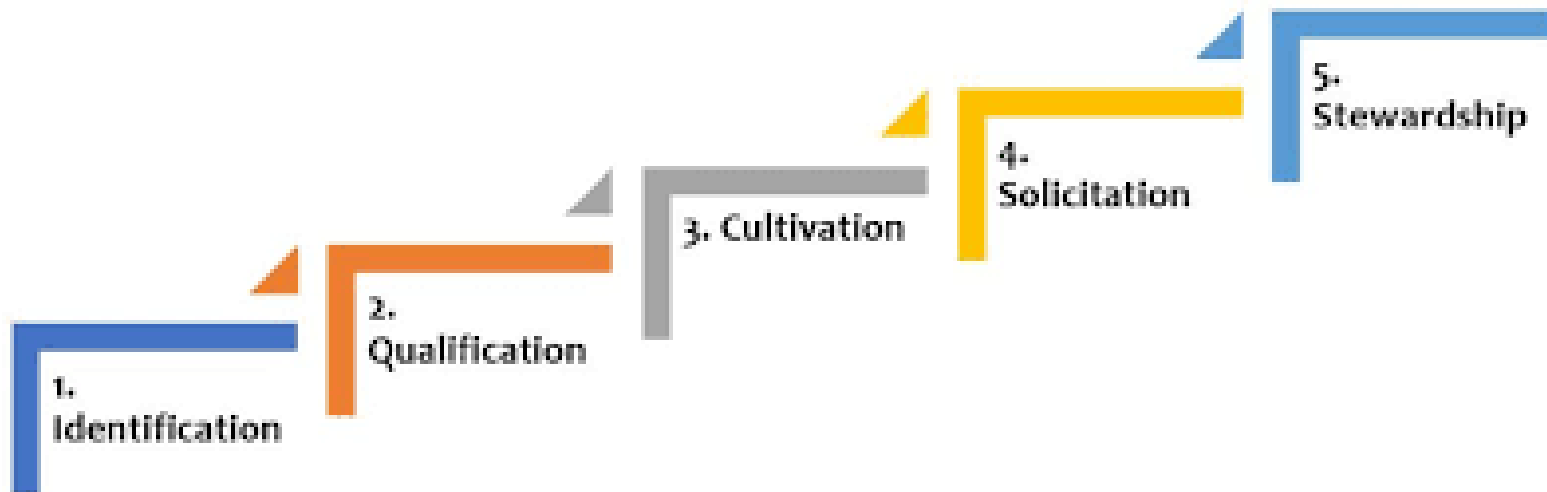
- Create a comprehensive and compelling Annual Campaign Case that outlines impacts and outcomes.
- Communicate with your donors four to eight times annually through diverse formats.
- Expose and ask your donors to volunteer, or attend programs, services, and events that are funded by AC gifts.



Recipes for Success

Increasing Your Major Donor Base:

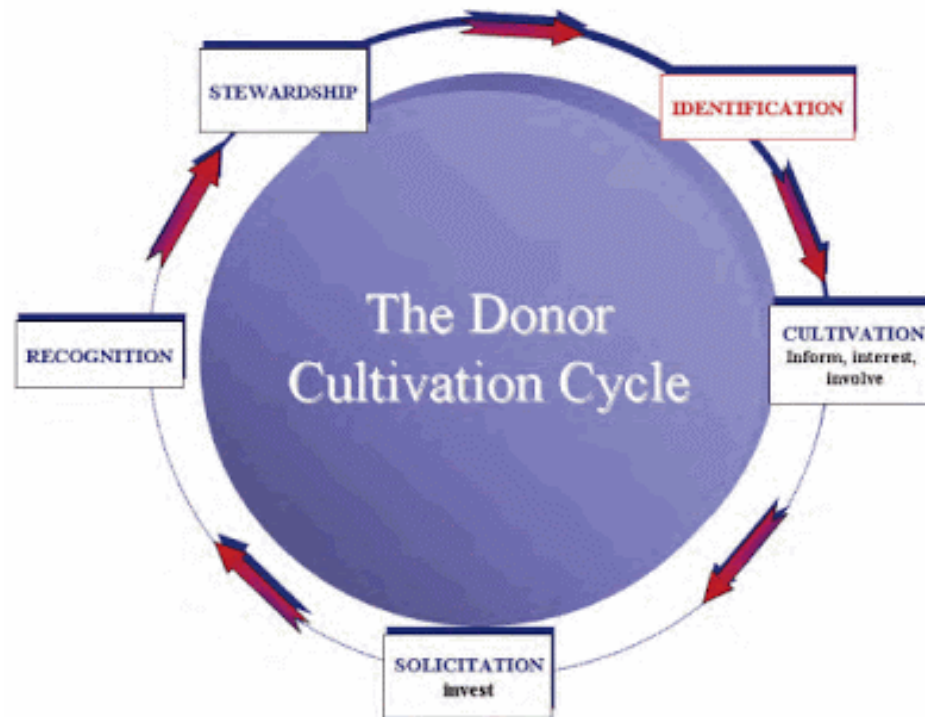
- Utilize a 'Moves Management' tool to move your Major Donors through the Donor Identification, solicitation, giving, recognition, to stewardship levels. Many examples exist...



Recipes for Success

The Donor Cycle:

- Your pathway to success...



**Identification, Cultivation, Solicitation, Recognition,
and Stewardship**

Recipes for Success

The Donor Cycle: Breakout Groups: 10-minute discussion

Breakout groups:

- Identification (& Qualification)
- Cultivation & Solicitation
- Recognition & Stewardship

In your groups, discuss the following:

1. What has your team tried and not been successful at?
2. Successful strategies your organization utilizes.
3. What are new strategies that could be deployed by your team?



The Donor Cycle Best Practices

Donor Cultivation:

- Cultivate your new Major Gifts prospects through your Moves Management matrix utilizing your volunteers and Board members.
- Work with your board to annually add new prospects to the mix.
- Ensure that you have the right connector, telling the right story that resonates with the donor and is willing to stretch the donor towards that Major Gift level.

The Donor Cycle Best Practices

Donor Solicitation:

- Ensure that all of your Major Gifts prospects have a connector willing to solicit them during the prescribed period of your campaign and ask for that stretch gift.
- Create a robust and compelling case that resonates with your donors and tells the Y's story and impacts.
- You miss 100% of the shots you never take, and if you don't ask the answer is always no.
- Make the ask, follow up immediately with a thank you from the connector and organization.

The Donor Cycle Best Practices

Donor Recognition:

Ensure that your organization has a robust and diverse Donor Recognition process that includes:

- Facility recognition such as donor boards (static and electronic).
- Annual report notation.
- Website recognition.
- Thank yous: email thank you, snail mail, personal calls, appreciation social events, testimonials, and visitation at cause driven programs and Y facility.

The Donor Cycle Best Practices

Donor Stewardship:

- Formulate a robust stewardship program that focuses on continued donor communication, appreciation, program impacts and personal stories and testimonials.
- Move those Major Donors into the planned giving phase of your YMCA Financial Development matrix.

Questions?



Contact Information

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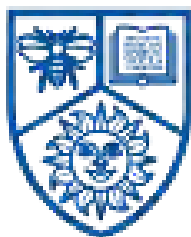
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Inspired Fundraising Solutions

Thank You!

**GIVE A LITTLE...
GET A LOT.**

Volunteer Opportunities

