

CREATE YOUR PLAYBOOK: OPERATIONALIZING THE ART AND SCIENCE OF MAJOR GIFT FUNDRAISING

THINK **BIG**
THINK **BOLD**
TAKE **ACTION**

JEREMY CRAMER, FACING HISTORY & OURSELVES
DOUG BARKER, BARKER & SCOTT CONSULTING

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Learning Objectives

- Learn how to assemble an effective cultivation team - what the roles should be and who should play them.
- Learn how to make major gift fundraising a deliberate and collaborative process that is donor-centric vs. organization-centric.
- Learn effective strategies for helping staff focus on the right prospects and the right actions at the right time.



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Agenda

- Speaker Introductions
- About Facing History & Ourselves
- Using a Major Gifts Playbook as a Catalyst for Transformation
- Critical Success Factors
- Examples of a Playbook's Transformative Power
- Key Takeaways
- Q&A



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Introductions

Jeremy Cramer

Chief Development Officer
Facing History & Ourselves

Doug Barker

Principal & Co-Founder
Barker & Scott Consulting



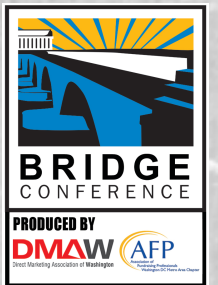
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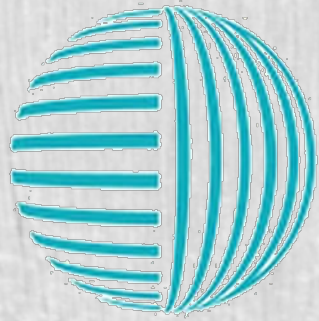
About Facing History

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About Facing History & Ourselves



FACING
HISTORY
AND
OURSELVES



Every day, reports of incidents of bigotry and hatred across the globe show us how fragile democracy can be.

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Facing History's approach heightens students' understanding of racism, religious intolerance, and prejudice; increases students' ability to relate history to their own lives; and promotes greater understanding of their roles and responsibilities in a democracy.

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Using a Major Gifts Playbook as a Catalyst for Transformation



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Essential Parts of a Major Gifts Playbook

1. Guiding Principles
2. Framework for Relationship Management
3. Detailed Processes & Protocols for Relationship Management
4. Performance Measures



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Guiding Principles

How We Treat Donors + How We Work Together

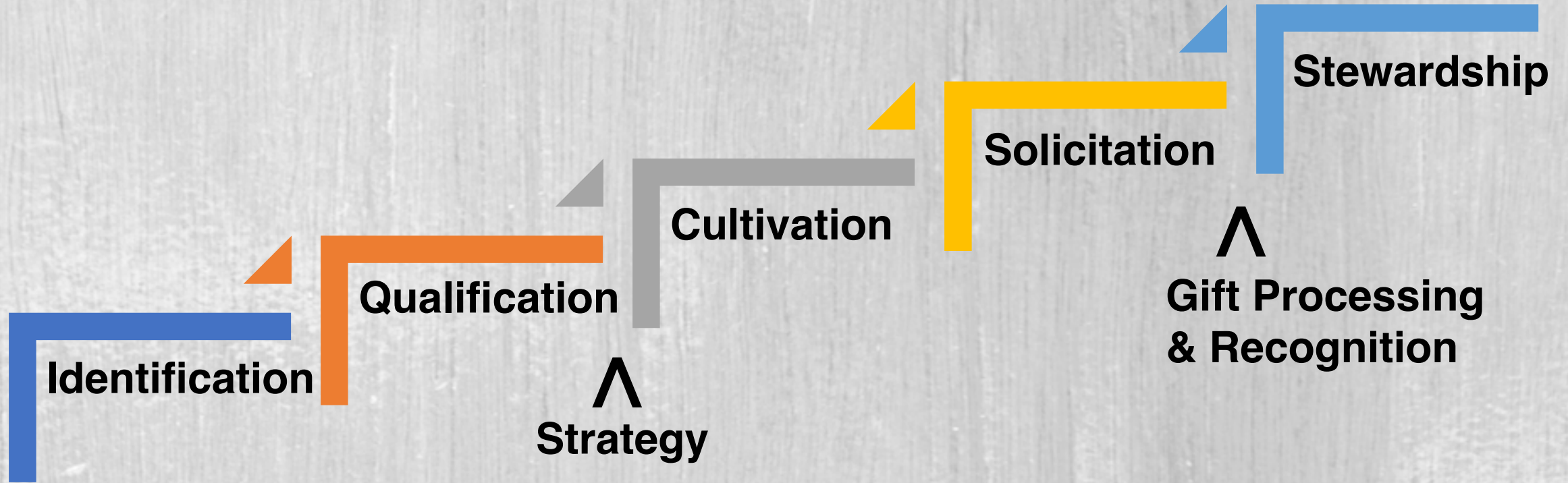


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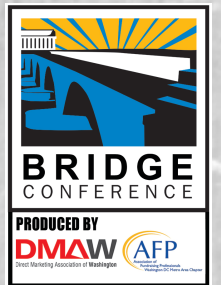


Framework for Relationship Management: “Moves Management”



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Detailed Processes: Example #1

Stage:
Strategy

Activity:
*Establish prospect
cultivation team*

Strategist (*One or Many*)

Serves as a coach or consultant to the Relationship Manager in developing the strategy to secure a major gift and/or meet a strategic goal.

Relationship Manager (*One Individual*)

Has overall accountability for the prospect and is responsible for strategically advancing the relationship, and overseeing the day-to-day execution of the cultivation strategy. This role is ideally fulfilled by a Development professional.

Natural Partner (*Many*)

Has an influential relationship (directly or indirectly) with a prospect that can be leveraged. The relationship may be pre-existing or develop during the course of cultivation.

Program Partner (*One or Many*)

Serves as the “content team” by providing programmatic subject matter expertise to assist with the case for donor support. This role is always fulfilled by a staff member.

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Detailed Processes: Example #2

Stage:
Cultivation

Activity:
*Regularly review
active prospects
(monthly pipeline
review meetings)*

Meeting Goals

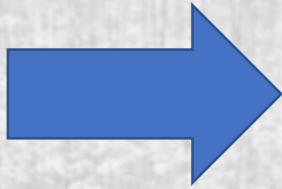
1. Review each priority prospect and determine, based on new information gathered since the last meeting, whether changes should be made to the strategy, team, target gift amount, inclination and readiness ratings, solicitation timeframe, or next steps.
2. Discuss any new prospects; identify any that may require a tailored solicitation plan or cultivation strategy.
3. Confirm that progress is being made on the planned interactions for the remaining prospects.
4. Determine if any prospects need to be removed from active prospecting at this time.
5. Discuss any “quick wins” and successes.



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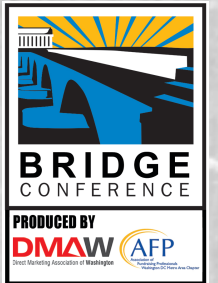


A Story About Results



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Initial Performance Goals

Initial Goals for Development Directors

1. Increase annual revenue
2. Maximize the fundraising potential of annual signature events
3. Maximize the “give or get” capacity of local boards
4. Adhere to the relationship management process for every prospect
5. Increase knowledge of organization’s transformative impact

Note: Below each goal are several performance measures



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Example Performance Measure #1

Goal:

Maximize the fundraising potential of annual signature events

Measure:

Achieve a 5x ROI



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Example Performance Measure #2

Goal:

Increase knowledge of our Facing History's transformative impact

Measure:

Participate in a minimum of 3-5 programmatic activities



Our Impact

Facing History's content and methods have been proven to significantly increase engagement, empathy, critical thinking skills, and civic responsibility among young people.

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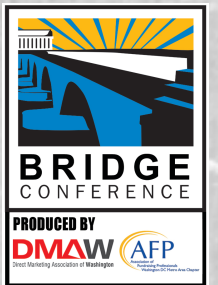
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Critical Success Factors

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Critical Success Factors for Playbook Creation

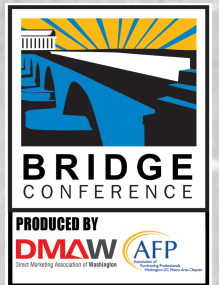
1. Project plan and active management/delivery
2. Honest assessment of current state
3. Transparency (process, data)
4. Change management
5. Organizational model/structure alignment
6. Revenue sharing alignment
7. Plan and resources for implementing the playbook
 - Coaching and mentoring
 - Course adjustments and refinement

Playbook can be Transformative

- Who you hire
- Who you recruit to your board
- How you talk about the organization to donors
- How you listen to and engage donors
- How you build a culture of philanthropy
- How you work collaboratively to raise more funds for mission



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Takeaways

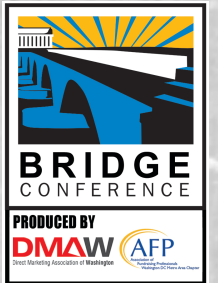
1. Do this work
2. You are never done

Music is the journey. You never arrive in music; the work is never over.

Phil Woods



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Thank You!

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