A bit about me and how this presentation came about...

- Grew up in Seattle; Bachelor’s from Willamette University in Oregon; and Master’s from Miami University in Ohio.
- Previously was CEO of Colorado Mountain College Foundation, VP of Vail Valley Foundation, Major Gift Officer at University of Denver, and Associate Development Director at SAE Foundation.
- Came to Weber State in June 2013 to direct $125M Comprehensive Campaign.
- First week at Weber I had to train a recent hire with no philanthropic experience... “This Is A Football” was born.
- For the two years I have also served as an adjunct consultant for Ter Molen Watkins & Brandt (TW&B) in Chicago and have used this presentation to assist clients.
Enough about me... let’s talk about Vince.
Late Green Bay Packers head coach, Vince Lombardi, who led his team to five NFL championships from 1959 to 1965 and additional victories in the first two Super Bowls held in 1966 and 1967, was focused on fundamentals.

**Blocking and tackling** were often the focus of his entire practices. Each pre-season at the first practice of the year Coach Lombardi would lecture to his players about the fundamentals of the game.

As part of this lecture, he would walk to the front of the room, with a football in his hand, and begin his annual speech with five words: “*Gentlemen, this is a football.*”
“How basic can you get? He [Lombardi] has got guys sitting there who have been playing on gridirons for 15 to 20 years... who know offensive and defensive plays better than they know their kids’ names... and he introduces them to a football! That’s like saying ‘Maestro, this is a baton.’ Or, ‘Librarian, this is a book.’ Or, ‘Marine, this is a rifle.’”

- Charles R. Swindoll
  Chancellor
  Dallas Theological Seminary
Like Charles Swindoll and many others who have applied Coach Lombardi’s philosophies and speeches to their particular area of professional and/or life interest, I believe that the “This is a Football” speech can be applied to fundraising.

What you are about to see (ladies and gentlemen) is the football of major gifts fundraising...
“The quality of a person’s life is in direct proportion to their commitment to excellence, regardless of their chosen field of endeavor.”

- Vince Lombardi
The below is a football for major gifts fundraising... let’s break it down in the remaining slides.

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The Donor Cycle

Discovery

Stewardivation

Cultivation

Solicitation
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DISCOVERY (x1)

- Who
  - Alumni Non-Donors
  - Aligned Corporations
  - Aligned Foundations
  - Parents
  - Community Members
  - Existing Donors
  - Others?
DISCOVERY (x1)

- **What**
  - Prospect Screening
  - Peer Referral
  - Linked-in
  - **BUT ULTIMELY...** A *discovery visit* by a Development Officer (either at an event or at a set-up meeting)
    - “Parties with a Purpose”
    - AAA Fundraisers
Where

- Comfortable setting
- On their turf
- *But just set this most difficult appointment!*
DISCOVERY (x1)

- **Who With**
  - Most likely just you
  - If there is clear giving ability or you need a carrot, then bring a leader of the institution
    - Former CEO of Cinemark
Why

#1: Determine giving ability/inclination

Secondarily:

- Determine ability/inclination to help get others to give
- Determine ability/inclination to serve
- Other reasons?
DISCOVERY (x1)

- When
  - All the time
  - Balanced with current donor/prospect interaction
DISCOVERY (x1)

How

- Rule of 3 Over 9: three phone calls combined with three e-mails (over a nine day period)
- Mix-in Linked-in to the above as necessary... likely in place of e-mail correspondence
## Cultivation

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CULTIVATION (x1, x2, x3, x4, etc.)

- Who
  - PROSPECTS
  - Determined to have CAPACITY
    - Not “Dave the janitor” with 10 kids
    - Not Dee Ward Hock - Founder of Visa
CULTIVATION (x1, x2, x3, x4, etc.)

- **What**
  - Details about program(s) of determined interest revealed through discovery
  - Be donor centric
  - Broach the topic of philanthropy
    - Use other alumni donors as an example
    - “I am not here to ask you for money today...” (recent example)
CULTIVATION (x1, x2, x3, x4, etc.)

- Where
  - On campus
  - In a unique rapport building setting
    - Examples?
CULTIVATION (x1, x2, x3, x4, etc.)

- Who With
  - Depends on capacity
  - Determine your “president-worthy” and “dean/director-worthy” levels
CULTIVATION (x1, x2, x3, x4, etc.)

- Why
  - To set up the ask
CULTIVATION (x1, x2, x3, x4, etc.)

- **When**
  - 3-4 weeks after discovery for a local prospect
  - 2-3 months after discovery for a regional prospect (depending on staff structure and size of prospect)

- A “stand-out” follow-up note should have been sent shortly after the discovery visit
CULTIVATION (x1, x2, x3, x4, etc.)

- **How**
  - Leave the discovery meeting with a suggested **next step**
  - Record that **next step** in your call report
  - Reiterate that **next step** in your follow-up note
  - Remind the prospect of that agreed-upon **next step** when setting the next appointment
CULTIVATION (x1, x2, x3, x4, etc.)

- Repeat entire cultivation process with slightly different ingredients as necessary
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**SOLICITATION**

**Cultivation (x1) (x1, x2, x3...)**
- PROSPECTS who are determined to have CAPACITY (not just ability or just inclination)
- Details about program(s) of determined interest revealed in discovery... be donor centric
- On campus; in a unique rapport building setting
- Depends on capacity... determine your “president-worthy” and “director-worthy” levels
- To set up the ask

**Solicitation (x1 + follow-up)**
- Well-cultivated, ‘ready’ prospects
- Small talk to set at ease; review vision and accomplishments; ASK (in the window of opportunity)
- Where the prospect is comfortable and won’t get distracted
- Because if you don’t ask your students don’t receive
- 2-4 wks after final cultivation meeting for a local; 1-2 mos after discovery for a regional prospect
- Refer to your/your co-cultivators interest in talking about ways that a difference can be made through aligned philanthropy

**Stewardivation (don't live here)**
- Donors who have upside
- Stewardship reports; annual giving society/legacy society events; personal touchpoints and visits
- Campus; fun activities; receptions; mail
- Nobody new; on own or with co-cultivator(s)
- Impacted students; Impacted faculty; YOU
- Because if you don’t ask your students don’t receive
- Once able to demonstrate PROI
- “I/we want to share how your support is making a difference, so please join us...”
SOLICITATION (x1 plus follow-up)

- Who
  - Well-cultivated, “ready” prospects
SOLICITATION (x1 plus follow-up)

- **What**
  - Small talk to set the prospect at ease
  - Review vision and accomplishments of the program/initiative for which you are seeking support
  - ASK (in the window of opportunity)
SOLICITATION (x1 plus follow-up)

- **Where**
  - Where the prospect is comfortable
  - Where the prospect won’t get distracted
SOLICITATION (x1 plus follow-up)

- **Who**
  - Nobody new
  - On your own or with co-cultivators
SOLICITATION (x1 plus follow-up)

Why

Because if you don’t ask, your students don’t receive

Philanthropy is a four-syllable word, not a four-letter word
SOLICITATION (x1 plus follow-up)

► When
  ► 2-4 weeks after final cultivation meeting for a local prospect
  ► 1-2 months after final cultivation meeting for a regional prospect (depending on staff structure and size of prospect)
SOLICITATION (x1 plus follow-up)

How

- Refer to your/your co-cultivators’ past presentation of the institution’s needs and the ways in which a difference can be made through aligned philanthropy
- Avoid a perceived “surprise attack”
SOLICITATION (x1, plus follow-up)

- In-person/intensive phone follow-up will likely be necessary
- Be prepared to tweak your original proposal, negotiate and nudge.
- Be prepared to nudge your organizational leader to negotiate and nudge
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STEWARDIVATION (*don’t live here*)

- **Who**
  - DONORS who have UPSIDE
STEWARDIVATION (**don’t live here**) 

**What**
- Stewardship reports
- Annual Giving Society Events
- Legacy Society Events
- Campaign Celebration Events
- Personal Touchpoints (through mail/e-mail/phone)
- Personal Visits
- Holiday Gifts
STEWARDIVATION (*don’t live here*)

- **Where**
  - Campus
  - Fun activities
  - Receptions
  - Drop-by’s
  - Other places that offer economies of scale
  - Stewardivation can be effective while still being efficient!
STEWARDIVATION (don’t live here)

- Who With
  - Impacted students
  - Impacted faculty
  - An institutional leader
  - YOU
    - make sure that YOU attend these events... YOU are the person to whom they made their gift.
STEWARDIVATION (don’t live here)

- Why
  - Move back into the discovery phase
  - Set up for the next gift
  - “Stewardivation”
STEWARDIVATION (*don’t live here*)

- **When**
  - Once able to demonstrate PROI
  - When there is an opportunity for a QUICK touchpoint that is not time-intensive
    - Dr. H
STEWARDIVATION (*don’t live here*)

**How**

- I/we want to share how your support is making a difference, so please join me...
- Easiest appointment to set/invitation to extend
- *Don’t live* in the Land of Stewardivation (even worse, the Land of Stewardship)
The below is a football for major gifts fundraising... now get out there and score!

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<td>4-6 wks after discovery for a local; 2-3 mos after discovery for a regional prospect</td>
<td>2-4 wks after final cultivation meeting for a local; 1-2 mos after discovery for a regional prospect</td>
<td>once able to demonstrate PROI</td>
</tr>
<tr>
<td></td>
<td>Rule of 3 Over 9 -- three phone calls combined with three e-mails (over a nine day period)</td>
<td>leave discovery meeting with a suggested next step, reiterate in f-up note, remind when setting this appointment</td>
<td>refer to your/your co-cultivators interest in talking about ways that a difference can be made through aligned philanthropy</td>
<td>“I/we want to share how your support is making a difference, so please join us...”</td>
</tr>
</tbody>
</table>

The below is a football for major gifts fundraising... now get out there and score!
“In order to succeed, this group will need a singleness of purpose, they will need a dedication, and they will have to convince all of their prospects of the willingness to sacrifice.”

-Vince Lombardi
Questions?

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or

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Today’s session evaluations will be emailed to you.

Session presentations will be available after the conference. Conference registrants will receive an email with links to these presentations.

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