

Donor Expectations *for Major Gifts*

In March 2006 we asked our donor clients and prospects a simple, open-ended question:

If you had to complete the following statement to a nonprofit, what are the first few ideas that come to mind?

"If you want a big donation from me, you had better . . ."

The statements below are actual quotes (edited only for clarity and consistency of form) from donors or foundation staff representing more than \$1.35 billion in givable assets. They are grouped into 11 categories which are presented in decreasing order of frequency.

DEMONSTRATE MANAGEMENT COMPETENCE & INTEGRITY

- ✓ Be a person and organization of character & integrity—be client focused (not organizationally focused)
- ✓ Live up to your promises
- ✓ Have a servant's heart
- ✓ Ensure the strong leader is "under authority"
- ✓ Have competent management
- ✓ Exhibit strong leadership and management skills, and executive leadership ability
- ✓ Have a servant style of leadership
- ✓ Be transparent
- ✓ Have leadership for implementation in place

SHOW RESULTS

- ✓ Demonstrate impact
- ✓ Be able to make a difference
- ✓ Have an eternal impact on lives
- ✓ Show me the fruit I should expect from my gift
- ✓ Serve a niche more effectively than others
- ✓ Be able to measure outcomes
- ✓ Have clear goals and outcomes identified for the project/program and the mechanisms in place to evaluate them—clearly indicating whether you have achieved the desired impacts
- ✓ Have a strong track record

MAINTAIN A RELATIONSHIP WITH THE DONOR

- ✓ Determine and then deliver the level and type of recognition (if any) that I seek
- ✓ Be receptive and appreciative
- ✓ Be just as concerned for what you can do for me as you are with what you can get from me
- ✓ Make me feel like part of the team, the inner circle
- ✓ Be interested in me and my life beyond my money (e.g., invite me to special events and happenings, include me in planning in those areas where I'm gifted and qualified, ask for my feedback)
- ✓ Have a project based on key relationships
- ✓ Be available
- ✓ Provide me with plenty of information before and after I make my donation

HAVE A COMPELLING CAUSE

- ✓ Have a compelling and timely need
- ✓ Present a specific request with detail budget information (not a general request)
- ✓ Have some strategic thinking behind your recommendation
- ✓ Have clear mission
- ✓ Evidence a true need for funding
- ✓ Have a good idea

- ✓ Have a passion for those you are serving

MAINTAIN & DISCLOSE EXCELLENT FINANCIAL RECORDS

- ✓ Have a complete and comprehensive set of financial information to show me
- ✓ Have a project based on sound information/research
- ✓ Have great financial accountability
- ✓ Evidence accountability, good financial records, audits, ECFA certification, Forbes ranking, etc.
- ✓ Have strong financial management and accountability mechanisms (tax filing and IRS compliance issues, etc.) in place
- ✓ Keep and provide timely financials

PROVE ABILITY TO EXECUTE ON A STRATEGY

- ✓ Be able to execute on the vision
- ✓ Be entrepreneurial, be innovative and compassionate
- ✓ Have an "in-action" or "living" master plan / strategic plan
- ✓ Show potential for success, e.g., of past successes, strategic plan, implementation plan (well-devised plan including implementation strategy)
- ✓ Have a clear strategic plan for organizational stability and long-term sustainability and demonstrate the capacity to fulfill your mission and programmatic objectives

SHOW EVIDENCE OF PROJECT SUSTAINABILITY

- ✓ Be able to create independence
- ✓ Leverage opportunities (Will our grant help other donors participate?)
- ✓ Demonstrate future sustainability
- ✓ Have long-term sustainability
- ✓ Have a long-term fundraising development plan

COMMUNICATE APPROPRIATELY AFTER THE GIFT

- ✓ Keep the donor informed after the gift
- ✓ Don't just assume I'm going to continue supporting you, particularly if the organization goes down a different path from the one that caught my interest in the first place
- ✓ After the check clears the bank, communicate and treat me as a partner
- ✓ Not send mailings every other day
- ✓ Not expect emergency donations on a regular basis

HAVE AN ENGAGED & CAPABLE BOARD

- ✓ Have an engaged and invested board, generously investing their own money
- ✓ Have effective governance
- ✓ Have a strong independent board in place

CONNECT WITH THE DONOR'S PASSIONS

- ✓ Be doing something I have an interest in/passion for
- ✓ Cast a compelling vision that links with my passion

OFFER TECHNICAL/TAX ASSISTANCE

- ✓ Show me ways to leverage my gift through tax benefits, matching, etc.

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