



The **23rd Annual**

Planned Giving CONFERENCE

presented by the **Northern California Planned Giving Council**

in association with Colonial Consulting, LLC

CULTIVATION / STEWARDSHIP / MARKETING TRACK

Session 3: 2:15 pm - 3:30 pm

Topic:

Creating a Major Gift Program in an Annual Gift Culture

Presented by:

Todd W. Rasberry, Ph.D.

Workshop Summary:

Major and planned gifts are key to an institution's flourishing in the future. However, many nonprofits are forced to focus on raising annual unrestricted gifts to meet immediate budget needs. Often, an annual gift culture limits the emphasis on and resources necessary for long-term major and planned gift fundraising.

Through case study review and discussing actual scenarios, participants in the workshop will better understand:

1. The difference between annual and major/planned gift fundraising;
2. Influencing cultural change from annual to major/planned gift focus;
3. How to measure progress in major/planned gift fundraising.

Workshop Presenter



Todd W. Rasberry, Ph.D. serves as the Vice President for Advancement and Adjunct Professor of Rhetorical Studies at Georgetown College in Georgetown, Kentucky. He has 20 years of higher education fundraising experience.

Prior to joining the staff at Georgetown, Dr. Rasberry served as the Director of Development at Perkins School of Theology SMU. Prior to that, he served as the Senior Development Officer for the College of Arts and Sciences at Texas Tech University in Lubbock, Texas. Todd is also a clergy member of the Northwest Texas Annual Conference

where he spent more than twenty years in local church ministry.

Todd received a Ph.D. in Technical Communication and Rhetoric from Texas Tech University, a Master of Divinity degree from Perkins School of Theology, and a Bachelor of Arts degree in Humanities from McMurry University. His research interests include rhetorical practices of fundraising, rhetoric and making meaning, social genre theory, intercultural communication, and theology of stewardship.

Todd has taught major gift fundraising studios and led workshops at CASE Conferences, Big XII Conferences, for various nonprofit clients both nationally and internationally, and for peers at institutions for which he works.

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Creating a Major & Planned Gift Program in an Annual Gift Culture: *and still meeting the budget*

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For Our Time Together

- Theory
 - Understanding culture
 - Leading through culture change
- Practice
 - Case Study
 - Anatomy of an effective AF/M&PG Program

Culture

A culture is a way of life of a group of people--the behaviors, beliefs, values, and symbols that they accept, generally without thinking about them, and that are passed along by communication and imitation from one generation to the next.

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Culture

without thinking

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passed along

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Cultural Change

How do you change culture?

You influence cultural change slowly over time.

Cultural change is recognized by behavioral change.

Most cultural behavior is unwritten.

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Leading Through Cultural Change

What is a leader?

One who motivates others to engage.

How can a leader influence cultural change?

Through values they express in decisions, priorities, promotions, consequences (values) that are propagated through the group or organization.

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Case Study

Georgetown College
(Handout)

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Case Study

How would you describe the Advancement culture of GC?

What one or two recommendations would you make to the VP of GC to influence culture change?

How would you lead cultural change among the Advancement staff at GC?

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Thinking About Your Particular Situation

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Your Particular Situation

What organizational changes will need to be made?

What organizational goals will be addressed by the culture change?

What challenges may exist, structurally and/or culturally? (How can the challenges be addressed?)

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Anatomy of an effective AF/M&PG Program

What are some differences between an AF culture and a M&PG culture?

- Time expectancy for gifts
- Work of the fundraiser(s)
- Potential for dollars raised
- What is important to measure

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Anatomy of an effective AF/M&PG Program

What should a healthy AF/M&PG Program look like? *(The conversation and strategy are different.)*

- One does not exist at the demise of the other.
- Annual gifts raises friends as well as funds.
- Major and Planned Gift officers focus on the long-term return on investment.

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Anatomy of an effective AF/M&PG Program

What additional resources will be needed to be effective?

- M&PG prospect pool
- M&PG fundraiser(s)
- Policies and plans for accepting, processing, and investing M&P gifts
- System for recording, tracking, and mining data

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Anatomy of an effective AF/M&PG Program

What should you measure (metrics)?

- AF –
 - dollars raised
 - number of donors
 - number of first time & lapsed donors, consecutive years giving
 - number of donors increasing gifts
 - average size of gift
 - % increases

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Anatomy of an effective AF/M&PG Program

What should you measure (metrics)?

- M&PG –
 - dollars raised
 - number of face-to-face contacts
 - evolution of donor relationship
 - potential of portfolio(s)
 - stages of prospect pool(s)

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Anatomy of an effective AF/M&PG Program

What should you measure (metrics)?

- Across the whole Advancement shop (AF/M&PG) –
 - measure activity in a fiscal year
 - dollars raised (pledges, planned gifts, and cash)
 - cash-in-the-door
 - unrestricted gifts vs. restricted gifts

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Take-Aways

- 1) You influence culture change (behavior) slowly, but you have to begin sometime.
- 2) Be clear and consistent with the direction (behavior) desired (measure and reward the behavior).
- 3) M&P giving is a 3 - 5 year investment on return.
- 4) M&P gifts are restricted (MG 60% / PG 20%).
- 5) M&P restricted gifts will not help alleviate budget crises.

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Take-Aways

- 6) AF unrestricted gifts for budget relief is a short-term proposition. (True or False)
- 7) Start your M&P gift program now by educating your leadership (tell the stories of the big gifts and how they were raised).
- 8) Measure the right things from the beginning.
- 9) Two steps forward, one step backward (stay the course, time is on your side).
- 10) Do not fear the messiness of becoming something more.

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Thank you for participating.

All the best in your Advancement work.

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Leading From AF to M&PG Culture

- 1) Create a safe environment for change.
- 2) Clearly articulate the desired behaviors and values.
- 3) Defend persons exhibiting desired cultural behavior.
- 4) Pay attention to, measure, and reward/recognize what is important—what is attended to, measured, and rewarded is valued.
- 5) Model, teach, and coach desired behavior.

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Leading From AF to M&PG Culture

- 6) Core values are revealed through the leaders reaction to crisis.
- 7) Reorganize and restructure the organization, systems, and procedures to fit the desired culture.
- 8) Tell stories about important events and people.
- 9) Formalize philosophies, creeds, and charts.
- 10) Ask team members to evaluate the cultural change.
- 11) Be patient.