

LEADING
PHILANTHROPY
2022

Stories from the Road

Major Gifts

Presented By
Julie Fink, MS, CFRE



Introduction

Storytelling is a key strategy for fundraising. Stories bring the data to life, they demonstrate cause and effect and they convey relatable messages. So let's hear some stories - stories as a major gift officer.

Gain an understanding of the donor engagement process through the narratives of successfully secured major gifts and those that felt flat.

This interactive session will offer insight into a prospect vs. a suspect, timing of the ask, navigating meetings that go off track, when a prospect "ghosts" you, and much more.

Today's Presenter



Julie Fink, MS, CFRE
Director of Development

A 17-year veteran in nonprofit with experience in healthcare and social services.

Currently, the Director of Development for Jefferson Health Office of Institutional Advancement in New Jersey.

Serves as president of AFP New Jersey Southern chapter, a board member of a national animal assisted canine therapy nonprofit corporation, and a mentor for beginning to mid-level development professionals in South Jersey.

In 2007, Julie founded and served as president of a community nonprofit that supported mothers and their children.

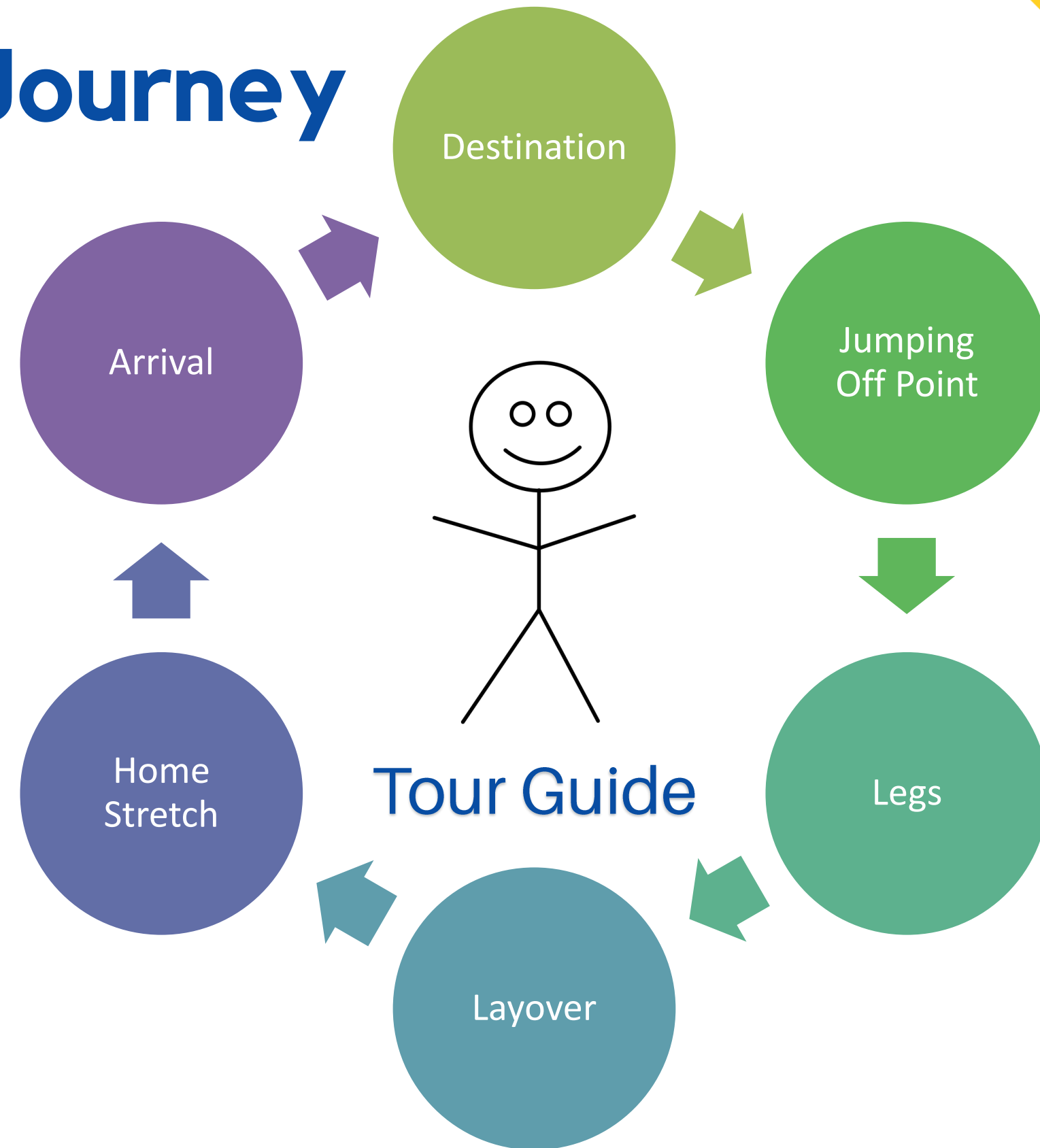
She holds her bachelors in communications from Rider University, a masters in nonprofit management and philanthropy from Bay Path University and is a certified fundraising executive (CFRE).



Learning Outcomes

- The basic psychology of donor interactions, ethical fundraising
- Tools to address challenging prospect situations and objections
- The factors related to decision making
- How to determine timing and amount of an ask

The Donor Journey



Gail



- 72, widow, mother of 3, grandmother of 5
- Executive Assistant for Nonprofit
- Late husband physician for 30+ years, sudden passing
- 8 month donor journey
- Benefactor - \$50,000 major gift

Assumptions

- What Gail Wanted to Accomplish
- Ask Amount
- Factor in Decision Making



Murray



- 74, married, no children
- Retired, entrepreneur/inventor, worked in radio, tv and broadcasting communication
- Volunteers at hospital
- Gives at annual giving level over many years
- 18 month+ donor journey
- Major gift prospect

Transparency

- Trusted Advisor
- Forthright in our donor interactions



Patrick



- 55, married to a nurse, 1 child, mother retired nursing leader at hospital
- Bank Executive
- Connections to various board members
- Had life-saving procedure at hospital
- 6 month+ donor journey
- Major Gift Prospect

Lingering Situations

- Goal is to get them to re-engage
- Opportunity to let them go vs. hanging on
- Language suggestions



Dan



- 51, married, two adult children
- President & Owner of Mechanical Service Company, a generational family business
- Contractor to several recent hospital capital projects
- Previous sponsor to events
- 3 month donor journey
- Benefactor - \$250,000 major gift

Investment

- Get the meeting
- Again, don't make assumptions
- Don't know until you ask
- Language Pivot - Investment vs. Gift



Carl



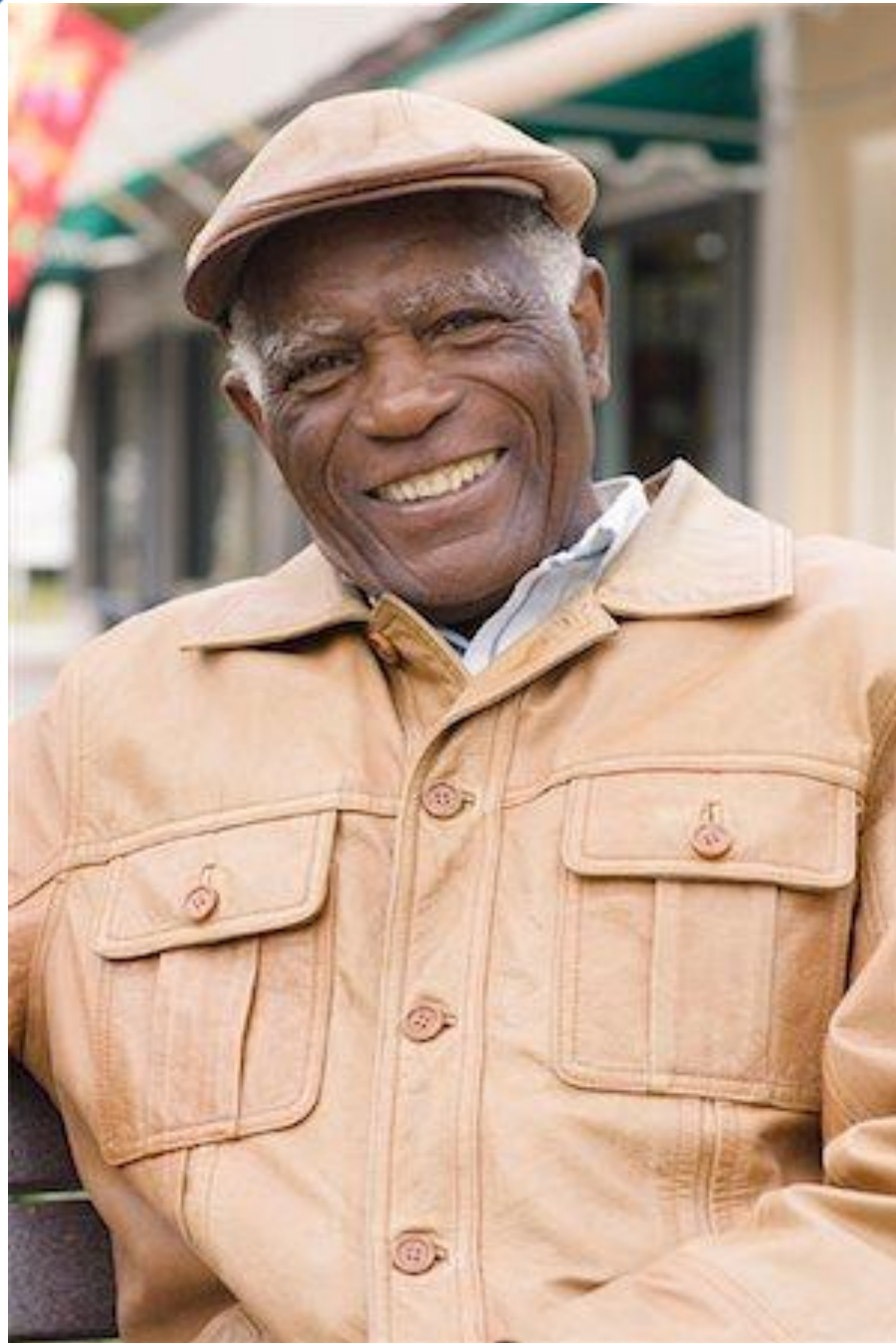
- 66, married, 1 adult child
- Senior Associate Director at large university; taught internationally in China
- Philanthropist and volunteers at several nonprofits
- Life-saving procedure at hospital
- 4 month+ donor journey
- Major Gift Prospect

Responding to “No”

- Prepare for possible responses
- What type of “No” did you receive? Listen to the reasoning after the “No”
- “No” now, does not mean “No” later



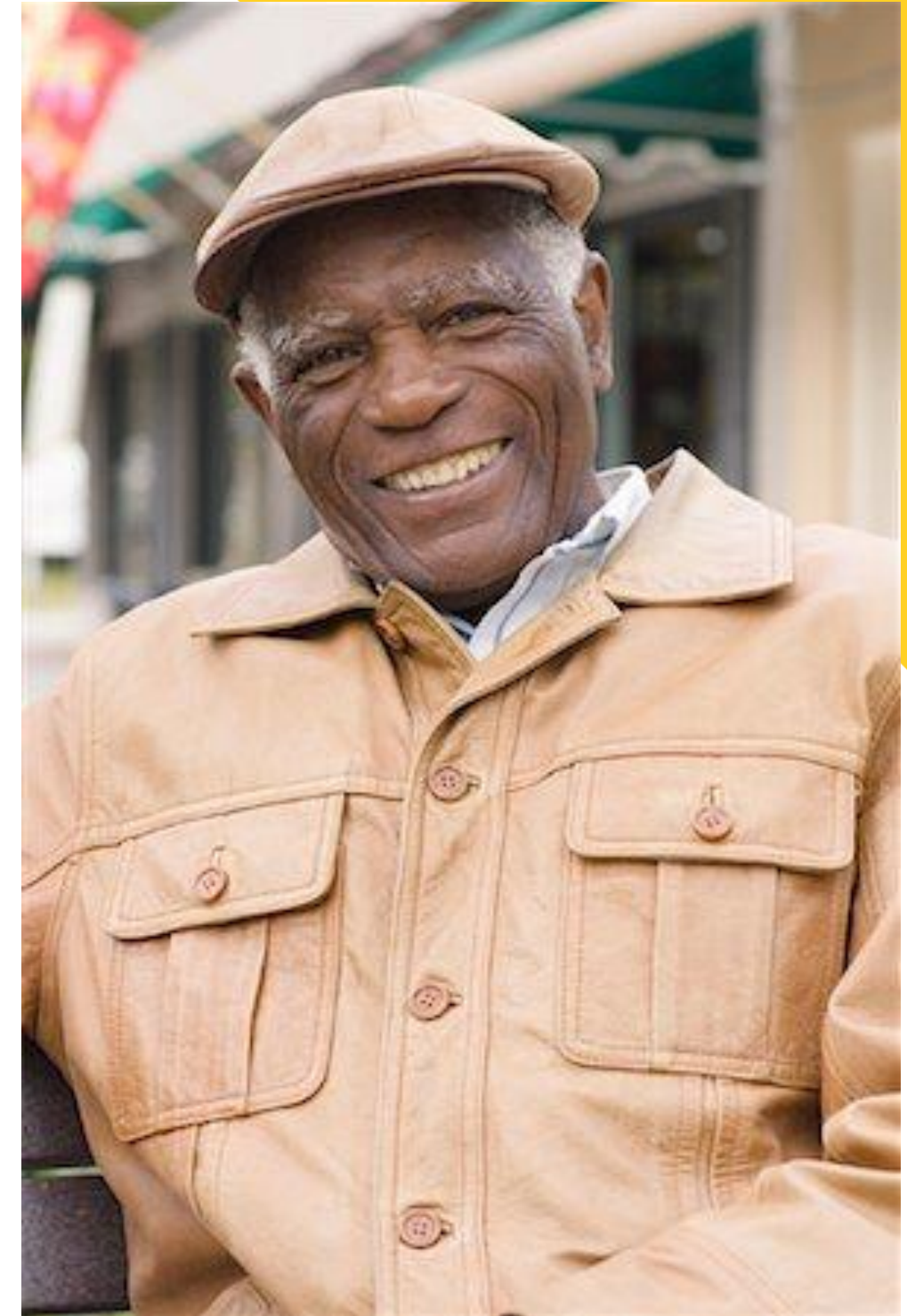
George



- George, 80, retired from long career in computers, married, wife a retired nurse
- 2 Adult children, 12 grandchildren
- Active in church and philanthropic
- Had a cardiac incident
- Identified by Cardiologist as grateful patient
- Major Gift prospect

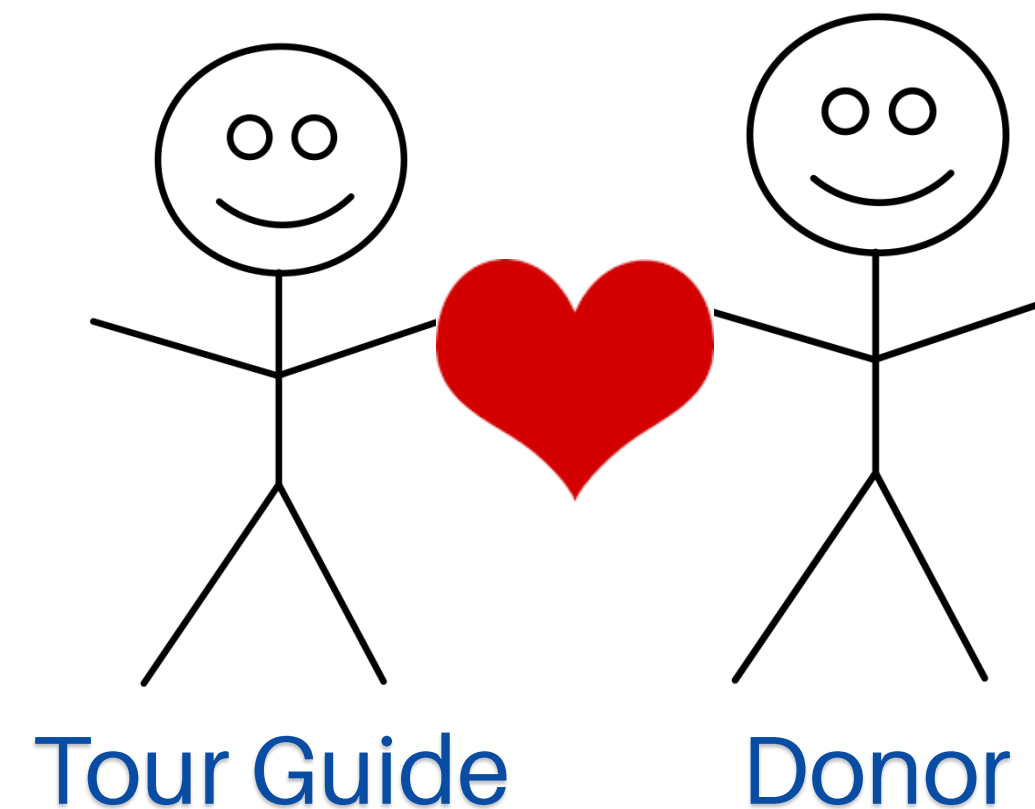
Ethics in Fundraising

- If it doesn't feel right – its not
- Keep them talking and listen for cues
- Your metrics and fundraising goals are not worth your integrity



Lessons from Stories from the Road

Gail – Assumptions
Murray – Transparency
Patrick – Lingering Situations
Dan – Investment vs. Gift
Carl – Responding to “No”
George – Ethics in Fundraising





Thank You!
Final Questions?

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