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CATHOLIC SCHOOL MANAGEMENT

# Letter<sup>SM</sup>

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## Planning and Executing a Successful Major Gift Program for the Catholic School

Let's begin this critically important issue of the *Catholic School Management Letter* with a statement – or more accurately, a re-statement – of the obvious. Catholic schools, in order to be viable and vibrant institutions both today and into the future, need third source income (i.e., income over and above tuition and diocesan, parish, or religious community support). For the majority of Catholic elementary and secondary schools this third source income is essential in order to maintain both affordability and accessibility. Even for the most high priced (tuition) Catholic schools, third source income is essential to enhancing operations and building endowment. While special events and fundraisers have historically produced some level of this third source income, it is essential that Catholic schools today initiate and maintain programs of annual giving, planned giving, and periodic capital campaigns. Although these programs are important to attracting revenue, they can be significantly enhanced through the planning and execution of successful major gift programs.

Drawing from the approach used in the writings of St. Thomas Aquinas who often spoke about what a new concept was not, before discussing what the concept is, we state emphatically at the outset that a major gift program is not about “the ask” or a simply well-structured solicitation. On the contrary, successful major gift programs are all about relationships.

Indeed, the process of major gift generation begins long before any actual solicitation. Board members, administrators, major gift officers, development directors, and sometimes faculty and staff are key individuals in identifying and cultivating eventual major donor prospects. Most often successful major gifts occur because of the length and depth of a relationship between the donor and an individual in the institution rather than on any particular request or need.

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Kerry Alys Robinson describes this relationship extremely well in her new book, *Imagining Abundance: Fundraising, Philanthropy, and a Spiritual Call to Service*. Throughout the book, but especially in Chapter 8, “Development Is Ministry,” Kerry describes the importance of building and maintaining relationships while at the same time being faithful to the mission of the institution.

One of the long-held truisms of development is that people respond to people not to institutions. This is certainly true in the arena of major gift cultivation and solicitation.

### What is a Major Gift?

Each school will define a major gift somewhat differently. For some the major gift is \$1,000. For others it could be \$5,000, \$25,000, \$50,000, \$100,000, or more. Defining the major gift for your school is important since it sets the stage for major gift planning, cultivation, and solicitation. Experientially we know that in mature development or institutional advancement programs approximately 80% of the money generated comes from 20% of donors. There is some evidence to suggest that today that ratio is closer to 90% of money generated by 10% of donors. Therefore, the major gift program is significant to the long-term viability and vitality of any Catholic school.

While a dollar amount may be assigned as a “floor” for a major gift, all solicitations for major gifts should result in an appeal for something specific. It may not be the dollar amount initially anticipated, but it could be a request to serve on the Board, attend a special event, or help with the design and implementation of a particular program for the benefit of the school. In all cases, the request should match the mission and needs of the school as well as the interests of the donor.

### The Major Gift Solicitation Process

Archbishop Patrick Riordan of San Francisco stated in 1912, “I have been so many years collecting money for churches and institutions of all kinds that I have come to the conclusion that there is no way of getting it except by personal appeal to those who have it and that appeal coming from the

lips of an enthusiastic speaker.” Enthusiasm and passion for the mission of the school are, of course, key. However, the following steps are essential to the successful major gift solicitation:

- Arranging the meeting;
- Opening;
- Presenting;
- Discussion and overcoming objections;
- Listening;
- Closing.

### Face-to-Face Solicitation Strategies

Arranging the face-to-face meeting:

Personal contact is most important. Ideally you will want to call the individual with whom you want to arrange the meeting. If the prospect cannot be reached by phone and you have an email address, try that form of communication. In this initial contact, try to be as brief and yet as enthusiastic as possible.

1. Introduce yourself – let the person know that you are a parent, alum, etc. volunteering your time to assist with the Leadership Gift Phase that is seeking lead-level contributions with which to expand the dining area, add a new media center, and/or create increased scholarship opportunities (these are examples of the brief statement for your case).
2. Ask if it would be possible to schedule a 30 to 45-minute meeting at their convenience at which you can present the most up-to-date plans and explore their interest in supporting it.
3. If the prospect agrees to meet with you, send a note to confirm the meeting time and place. If arranging a meeting is not possible, ask if you can send a case statement for review and call them a few days later to see if they have any questions.

Opening:

The opening usually involves an initial greeting and introduction, followed by the ability to question for or establish common ground. During the presentation, the school representatives will refer to

the mission and the important program or programs of the school being presented while also probing for interest on the part of the individual. Establishing common ground is essential.

#### Presenting:

As Archbishop Riordan said so well, the presentation must come from an individual or individuals who are enthusiastic and committed. Your presentation should speak well of the mission of and vision for the school. Moreover, the presentation should lay out elements of the case that have been well researched and matched to the probable interests of the donor. Remember that not all face-to-face meetings will result in an outright gift. Successful outcomes may include establishing a second meeting, inviting the individual to become more involved in the school or to serve on a committee, or simply to plan a visit to the school in order to gather additional information. Throughout the presentation you will want to speak of what has already been done. For example, have 100% of the Board members already committed to the project or case? Have faculty members contributed substantially to the effort?

#### Discussion and Overcoming Objections:

In the process of asking for contributions, particularly when soliciting major donor prospects by the face-to-face method, you may encounter objections to give at the level presented, to give at the time, or to give at all. Below are some possible reactions you may hear and a suggested way(s) to respond to them.

1. "I am/We are not able to make a contribution in this range."

Response: *Is there a gift that you would be willing to make that is within your means and will help us to achieve our goal?*

2. "I can't make a decision right now. I need to discuss this with my spouse, business partner, tax attorney, etc." (See note below.)

Response: *I certainly understand. I would never make a gift of this magnitude without*

*discussing it with my husband/wife, etc. Would you like to arrange another meeting with the three of us so that I would be available to answer any questions he/she/they might have? (Set a date if possible.)*

or

*I certainly understand. How about if I give you a chance to discuss this with your husband/wife, etc., and give you a call next week on (specific day) to see if you have reached a decision?*

3. "Who ever told you that I could afford to give that amount?"

Response: *The school administration, with assistance from the members of the Board of Trustees, prepared a list of individuals, couples, and businesses that they feel would be willing and capable of making a gift in this range. It is my understanding that this list was created based on past giving history, occupation, place of residence, stature in the community, and/or identification by another parent, graduate, or friend giving a similar amount. I'm just a volunteer who was assigned the task of asking you to consider a gift in this range. I'm sorry if I have offended you and apologize if I have asked you to consider a gift beyond your means. Is there a tax-deductible contribution you would be willing to make at this time?*

4. "I'm not giving anything to that school because...."

Response: *I'm sorry you feel that way. Would you like me to convey your feelings to \_\_\_\_\_ so he/she can respond to your concerns? Perhaps if you had an opportunity to discuss this issue with someone else, you might be able to resolve it.*

5. "I don't understand why you have been asked to see me about this contribution. I usually discuss personal gifts to the school with \_\_\_\_."

Response: *I'm sorry. I was not aware of that when I selected your name or it was assigned to me. Would you feel more comfortable if I*



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*inform \_\_\_\_\_ that you would like to meet with him/her to discuss your commitment to this campaign?*

The above objections and possible responses are designed for volunteers involved in an annual fund or capital campaign. Ideally, major gift requests are made by a school administrator, Board member, or major gift officer who has developed and maintained a personal relationship with the donor prospect. Of course, a Board member may “partner with” a school administrator in making a major gift request.

#### Listening and Closing:

Once the case has been presented, wait until the prospect responds before you speak again. You will want to listen carefully to the donor prospect. What are they interested in? What objections might they have? What new ideas or priorities are they willing to offer? As you attempt to bring a meeting to a close, pay particular attention to what the individual has said to you.

If a pledge is secured, follow up with a letter thanking the donor and outlining the specific details of the donation, such as the formal name for publication and the pledge payment schedule.

Continue to express your appreciation. You cannot thank a donor enough. Acknowledgement activities that promote donor retention will lead to other future gift opportunities. Remember that acknowledging gifts in a timely manner is a key step in securing the next donation for the next project.

Whatever the result of the solicitation meeting, it is important that you continue to cultivate the relationship with the prospect/donor in a positive way. Involve donors and prospective donors in the life of the school by inviting them to specific events or involving them on a committee of the Board in which they may have expertise.

Begin planning the next steps of the cultivation process, such as announcing the gift internally, and seek approval for public recognition. Recognizing a gift, no matter the amount, is part of the cultivation strategy for the next gift.

A Major Gift Program that employs a continuous cycle of prospecting, researching, cultivating, soliciting, thanking, involvement, and follow up will help to ensure a viable and vibrant school well into the future. Remember, major gifts are all about relationships: developing them; maintaining them; cultivating them; and respecting the individuals.

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