

MASTERCLASS

HOW TO GROW
RECORD GIVING
IN 2017



Our Time Together



- Step by step approach to crafting your plan to grow significant giving
- Specific methods to expand your base of significant giving and gain momentum quickly
- Where to put your efforts for the greatest results
- Help you avoid wasted time, energy, and resources
- Self-discipline and habits to help you succeed
- Answer your specific questions
- Special access to resources and time with us to learn more

“...the discipline of growing real relationships with people, helping them see what God is doing, and then challenging them to have the impact that only they can have.”

Do you have a resource problem?

People Problems

Giving is the *fuel that drives us forward.*

YEARLY
GIVING
SCORECARD

PROSPECT
PLAN

YOUR
MESSAGE

ADVANCEMENT
PLANNING
FRAMEWORK

SELF
LEADERSHIP

THE YEARLY GIVING SCORECARD



DODGERS 63-48		St. LOUIS 52-46	
CF GIBSON	237	SS FURCA	276
2B ELLIS	256	2B DELSCALSO	234
CF KEMP	339	1B HOLLIDAY	319
RF ETHIER	292	1B CRAIG	299
3B RAMIREZ	251	RF SCHUMAKER	317
1B RIVERA	266	3B CARPENTER	288
PH HANSTON	297	CF BOST	238
PH ELLIS	276	CF JAY	301
PH ABREU	245	P MOTT	000

KMOX 1120 KMOX

Webster UNIVERSITY
webster.edu/u

OFFICIAL SCORING
K

0 BALL 0 STRIKE 0 OUT

St. Louis Cardinals

Mercy

HELITECH
helitechonline.com

	1	2	3	4	5	6	7	8	9	R	H	E	LOB
LA	0	0	0	0	4	0	0	0	0	4	8	1	5
STL	0	0	0	2	4	1	0	0	0	7	18	1	11

1 2 6 9 10 14 17 20 24 42 45 85

WORLD CHAMPIONS

Bank of America

AL RBI LEADERS
CABRERA 82

61 HAMILTON
72 WILLINGHAM
71 DUNN
69 FIELDER

DET CLE 6:05
NYM ARI 8:40
KC SEA 9:10

TB 2 FINAL 6
WP C. Tillman 5-1
LP J. Shields 5-7

A 4 FINAL 10
WP B. Lyon 1-2
LP T. Wilson 9-7

START P A. Barnack 11-3 3.29
7:05 D. Kouchel 7-1 4.03

START W E. Jackson 5-0 5.0
7:10 M T. Galardo 8-7 3.32

Brewers designated catcher George Kottaras for assignment

DELTA **PHILLIPS 66** **STIFEL NICOLA**

Best Cards Coverage **ST LOUIS POST-DISPATCH** **today**

Bank of America **Hardee's** **US Cellular** **30 MOTTE WL 4-3 ERA 2.66** **US Cellular** **STLFORD Ford .COM** **SMIDWEST** **State Farm**

BUSCH STADIUM 375

	2016	2015	2014	2013	2012	2011
	as of 12/31/16					
Total Number of New Donors		951	1122	736	891	693
Total Number of Donors		1503	1567	1189	1233	919
Total Number of Donors Retained from Previous Year						
Number of Donors Regained from 2 years ago or prior						
Total Giving YTD		\$ 729,208	\$ 619,743	\$ 342,525	\$ 372,608	\$ 360,605
Total Number of Donors in Overall Population						
% Average Size (by \$):						
1-50		56%	64%	63%	57%	61%
51-100		18%	15%	13%	18%	15%
101-300		12%	10%	12%	13%	13%
301-500		5%	5%	5%	5%	4%
501-1000		4%	4%	4%	3%	4%
1001-5000		4%	2%	3%	2%	2%
over 5000		1%	1%	1%	1%	1%
Total Number of Donors in the Last 5 Yrs (2012-2016)						
Donors that decreased giving from prior year						
Donors that increased giving from prior year						
How Many / Who are LYBUNTS (People who gave 2015 but not 2016)						
Total potential giving of LYBUNTS						
How Many / Who are SYBUNTS (People who gave 2013, 2014, 2015 but not 2016)						
Total potential giving of SYBUNTS						
Total Long-term giving commitments						
Total monthly giving commitments in place						

PROSPECT PLANNING

DONORS TO RETAIN

- List from highest to lowest in total giving for the year
- Establish a target amount, range, or commitment level for each and every one
- Calculate the possible low and high totals

DONORS TO REGAIN

- List from highest to lowest in total giving
- Go back 5-7 years
- Calculate the total potential giving of donors to retain group

DONORS TO RECRUIT

- New people on your list
- New parents, grandparents, etc
- People selected from your non-donor list to focus on

NON-DONORS

- Identify who to release
- Identify who to recruit
- Look for ways to stop training them to not give

YOUR MESSAGE

SAVING OR CHANGING LIVES

PROFILE OF YOUR VISION

KEY QUESTIONS

GIVING DRIVEN STEPS

STEP 1
COMPLETE

STEP 2

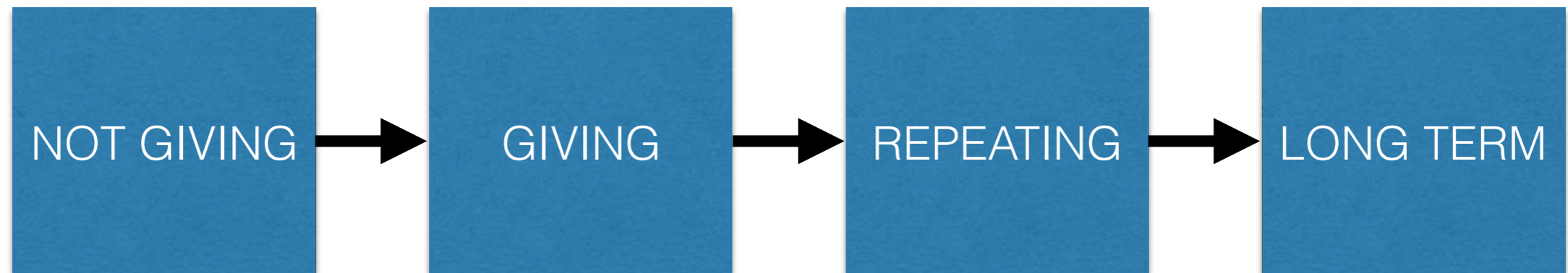
STEP 3

STEP 4

ADVANCEMENT PLANNING FRAMEWORK



DEFINITIONS: A GIVING DRIVEN APPROACH



DEFINITIONS: DEVELOPMENT STRATEGY

FACE TO
FACE

DONORS TO
RETAIN

DONORS TO
REGAIN

SMALL
GROUPS

DONORS TO
REGAIN

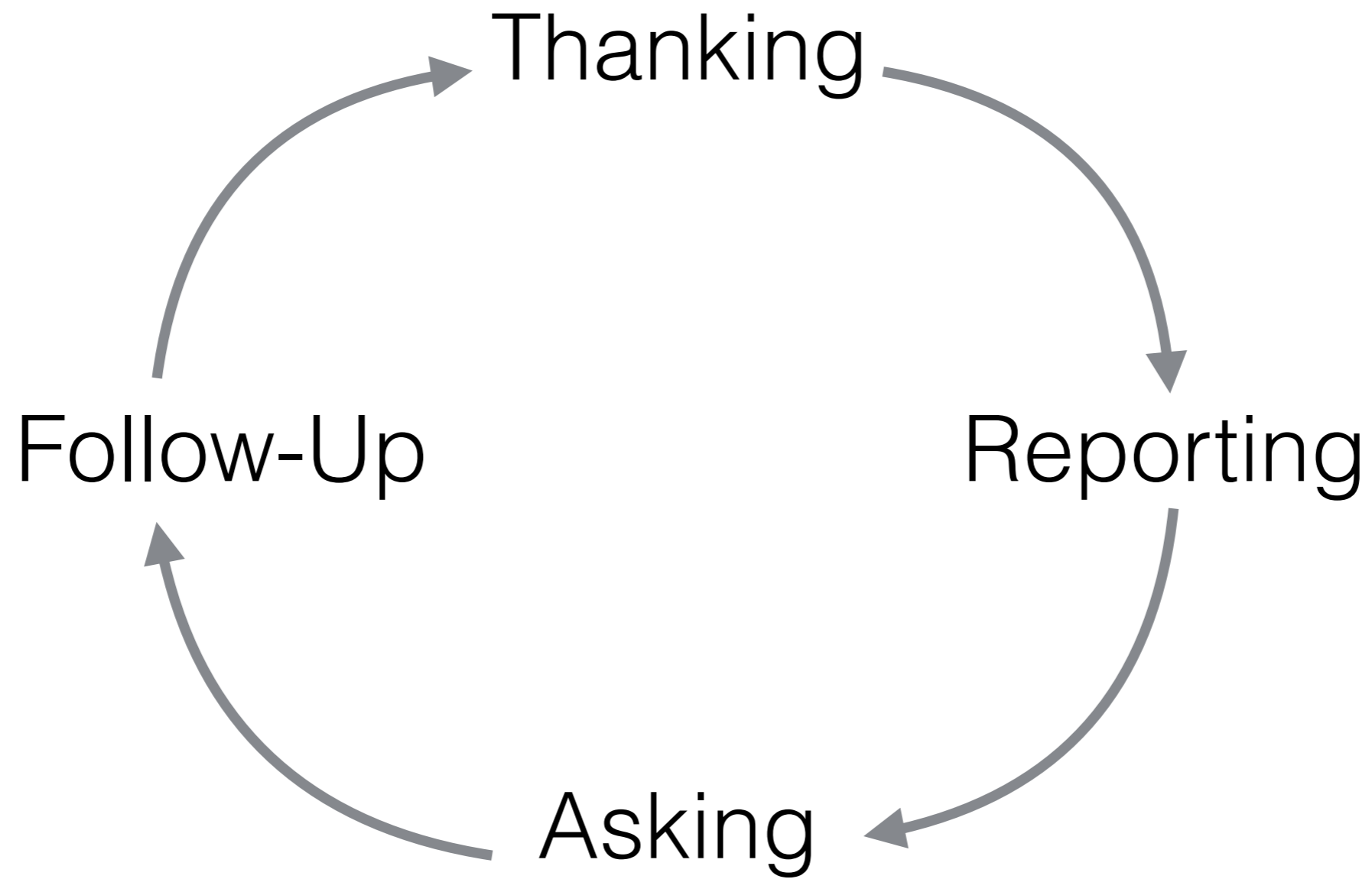
DONORS TO
RECRUIT

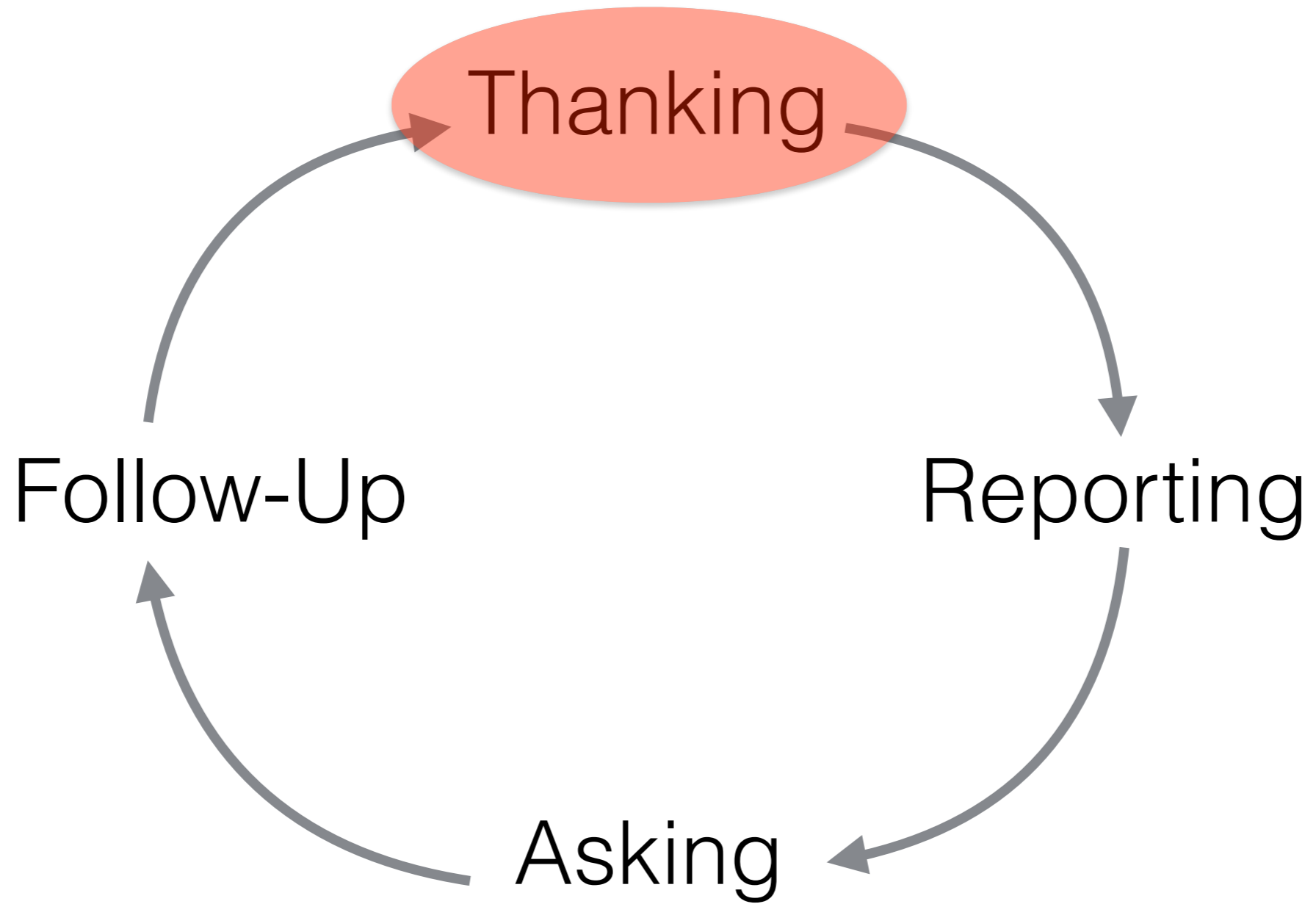
LARGE
GROUPS

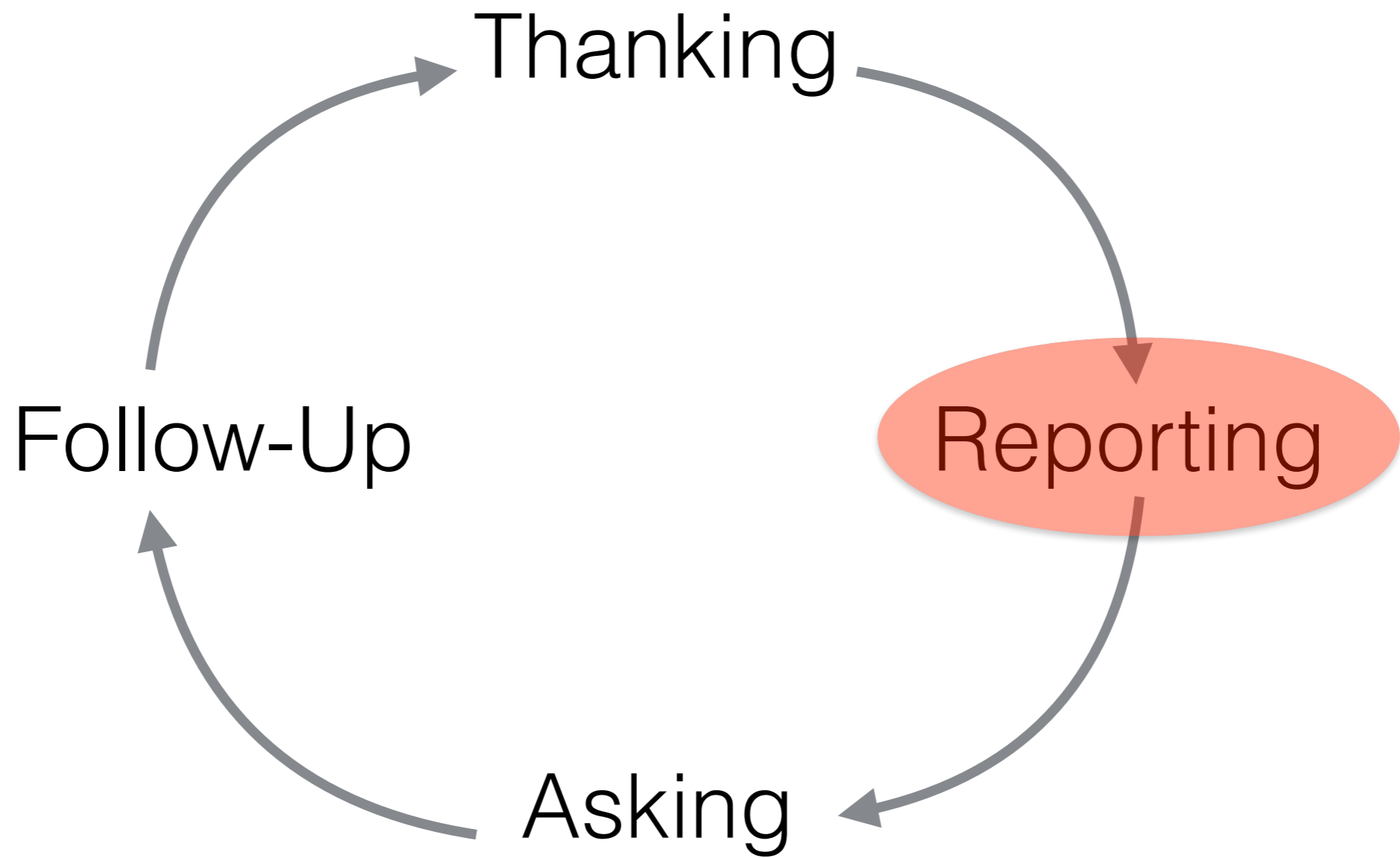
DONORS TO
RECRUIT

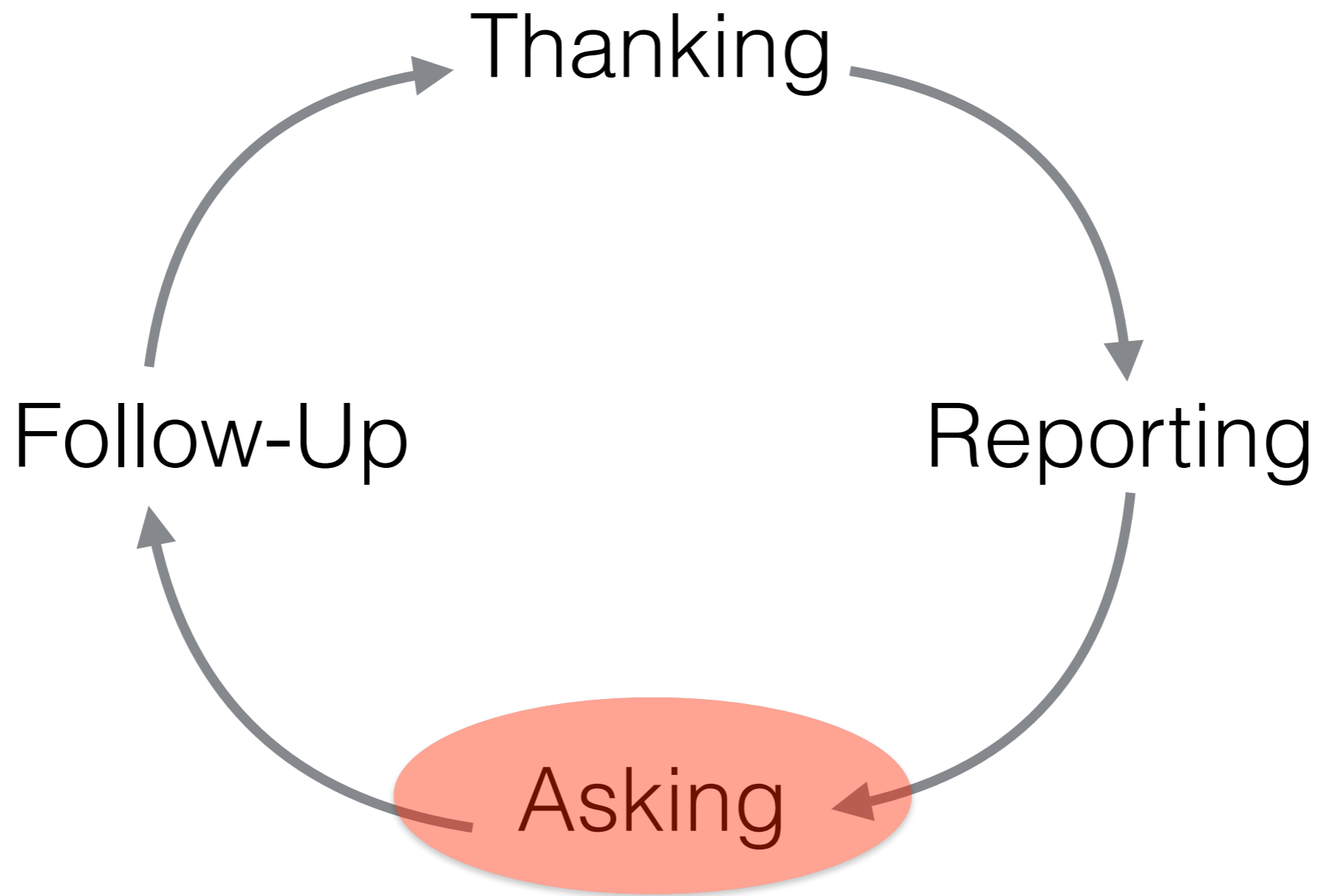
NON
DONORS

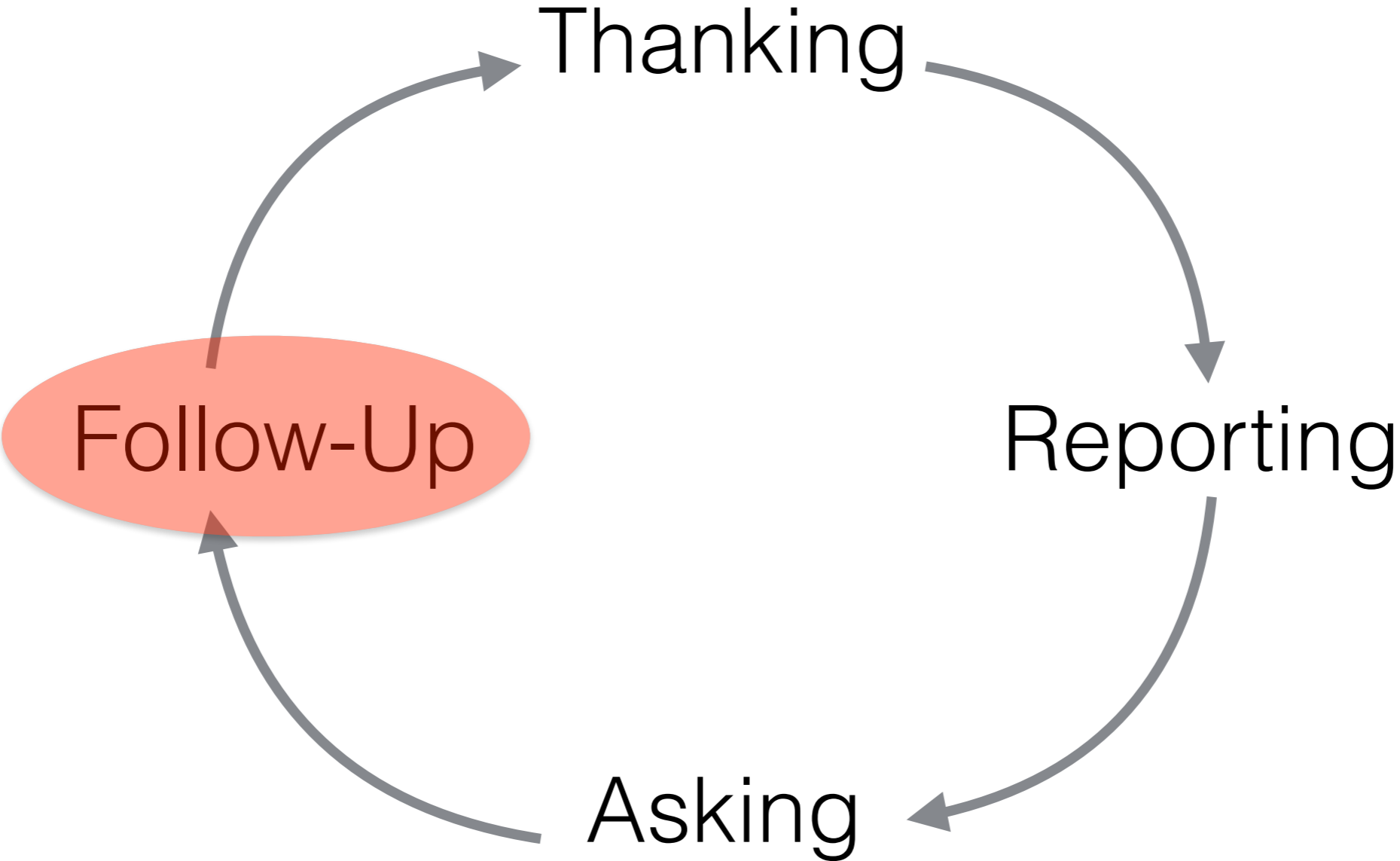
DEFINITIONS: THE DONOR JOURNEY











DEVELOPMENT STRATEGY: ACTIONABLE STEPS

FACE TO FACE

- Secure a challenge commitment
- Focus on 10-30 people and ask to respond to the challenge
- Use the straightforward asking approach
- Follow-up
- Guide the decision-making process

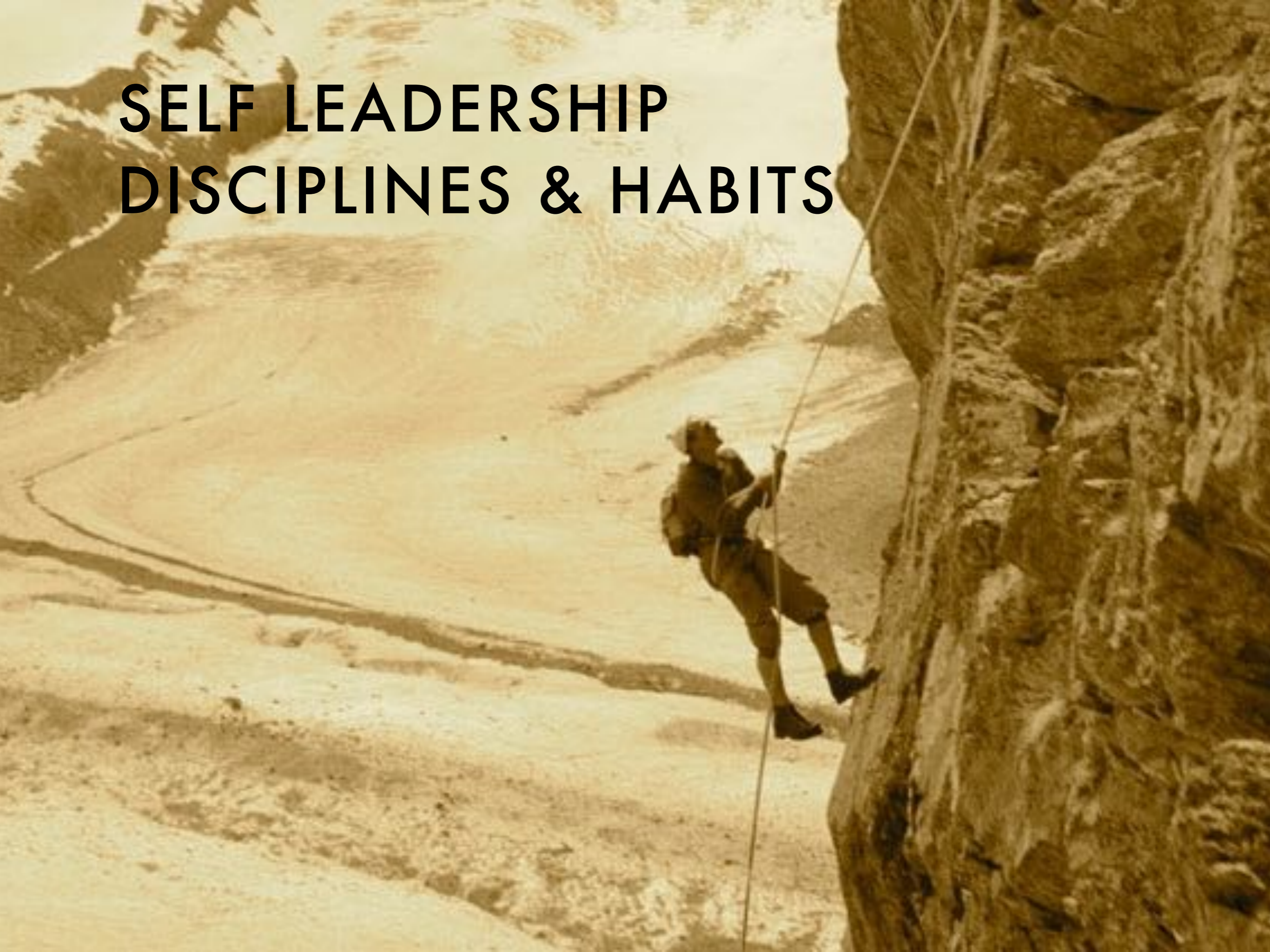
SMALL GROUPS

- Recruit hosts
- Focus on donors to regain and donors to recruit
- Present vision, talking points, stories and teach people about giving
- Use a gift chart
- Send written requests later
- Follow-up

LARGE GROUPS

- Thanking and reporting is key
- Follow-up to call attention to the reporting
- Send request letter and emails in combination
- Follow-up calls seeking questions
- Updates and additional requests

SELF LEADERSHIP DISCIPLINES & HABITS



DISCIPLINES AND HABITS:

PLANNING

- Reinvent yourself every year
- Simplify, Delegate, Eliminate, *then* Improve
- Evaluate your capacity and discretionary time
- Use a Model Week**

PEOPLE

- Do a full accounting of your influence
- Use a Weekly Scorecard**
- Use First Meeting Disciplines
- Thank people every day/week

FOLLOW-UP

- Identify the next action**
- Use the memorandum of understanding
- Calendar your follow-up
- Use a long-lasting follow-up list

◀▶ Sunday, September 16 – Saturday, September 22, 2012 (Week 38)

	16 Sunday	17 Monday	18 Tuesday	19 Wednesday	20 Thursday	21 Friday
6 AM		Interval Training	Weight Training	Interval Training	Weight Training	Interval Training
7		Creative Content Work		Creative Content Work		Creative Content Work
8			Breakfast Meeting or Follow-up Work		Faculty-Staff Devotions	
9					Breakfast Meeting 8:15 start time	No meetings (Reserved for special projects, golf, or special... Needs my approval to schedule)
10	Advancement Leadership Team Meeting (Lauren, Michelle) Zach's Office	Phone calls, coffee meetings, ad hoc group meetings	Phone calls, coffee meetings, ad hoc group meetings		Follow-up work	
11	Video Conference with Erica	Break	Break		Break	
12 PM	Weekly Prospect Meeting with Steve Lauer Qdoba	Lunch Meeting	Lunch Meeting		Lunch Meeting	
1						
2	Discipleship mtg w/Stan Bower	Meetings in the office		Pickup Nathan, Homework, and Time Together	Meetings in the office	
3						
4	Meeting: Sarah Holley Zach's Office				Success Mtg w/ Steve Lauer	

YOUR WEEKLY SCORECARD NUMBERS

How many face to face meeting blocks do you have held on your calendar in the next six weeks?

?

How many face to face meetings do you actually have scheduled for the next six weeks?

?

How many face to face meetings did you have this past week?

?

How many people are on your follow-up list?

?

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**“Average players want to be left alone.
Good players want to be coached.
Great players want to be told the truth.”**

Doc Rivers



Raise Money. Unlock Hearts. Get Moving.

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