



Annual and Major Giving

*The Mario and Luigi of Your Healthy Gift
Pipeline*

Greta Daniels, CFRE, Director of Development at the University of Pittsburgh

Sarah Myksin, Director of Annual & Special Giving at DePaul University

Why are we talking about this?

Greta Daniels, CFRE

- 10+ years of experience in alumni relations, annual giving, major giving
- Oversees comprehensive development operations for Pitt SHRS, one of the nation's leading health and rehabilitation science schools
- Works for separate educational foundation within a multi-tiered development and constituent relations organization of 250 FTE

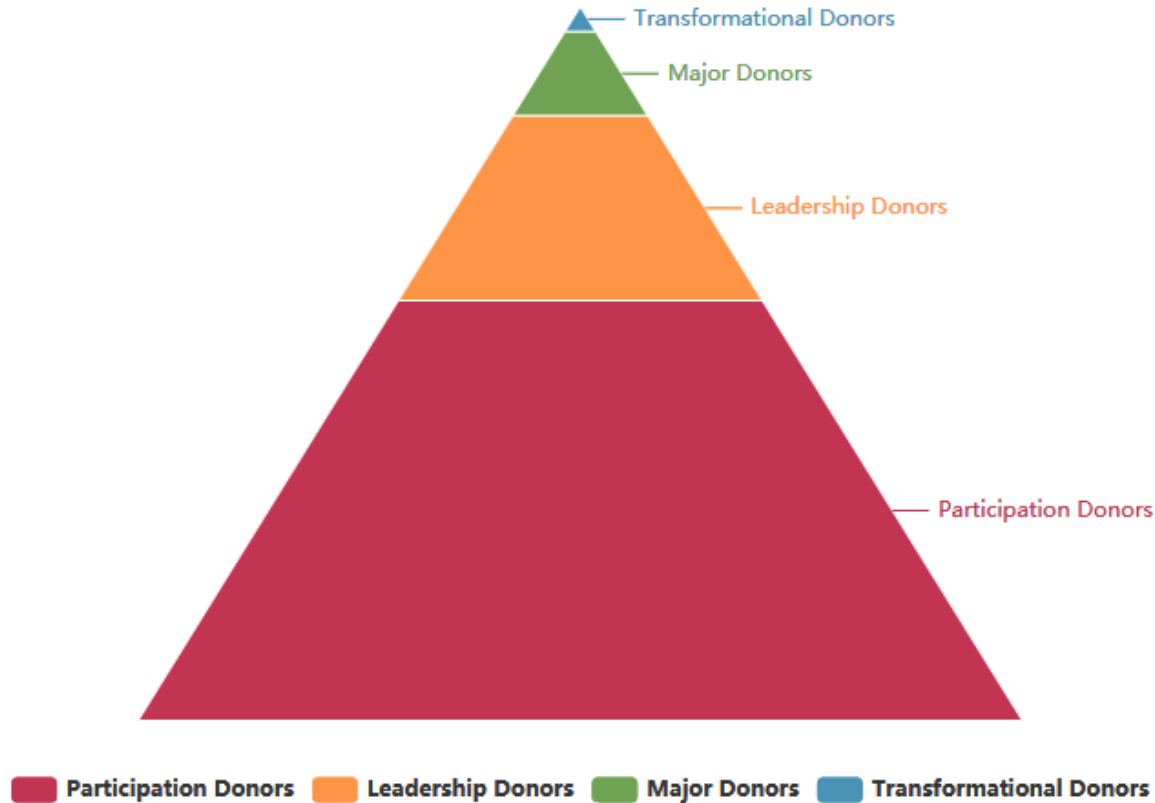
Sarah Myksin

- 13+ years of experience in annual giving, alumni relations.
- Oversees annual giving team (3 FTE) and all annual giving activity at DePaul University, primary focus is increasing alumni participation
- DePaul is the largest Catholic university in the US; with 186,000 alumni from 10 schools and colleges.
- Works within an advancement team of 75 FTE

What is a healthy gift pipeline, or, why are we here?



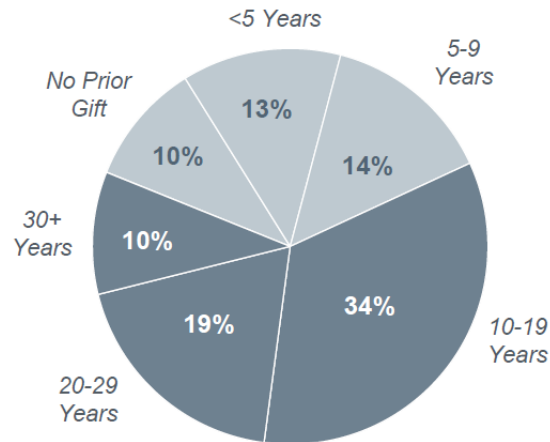
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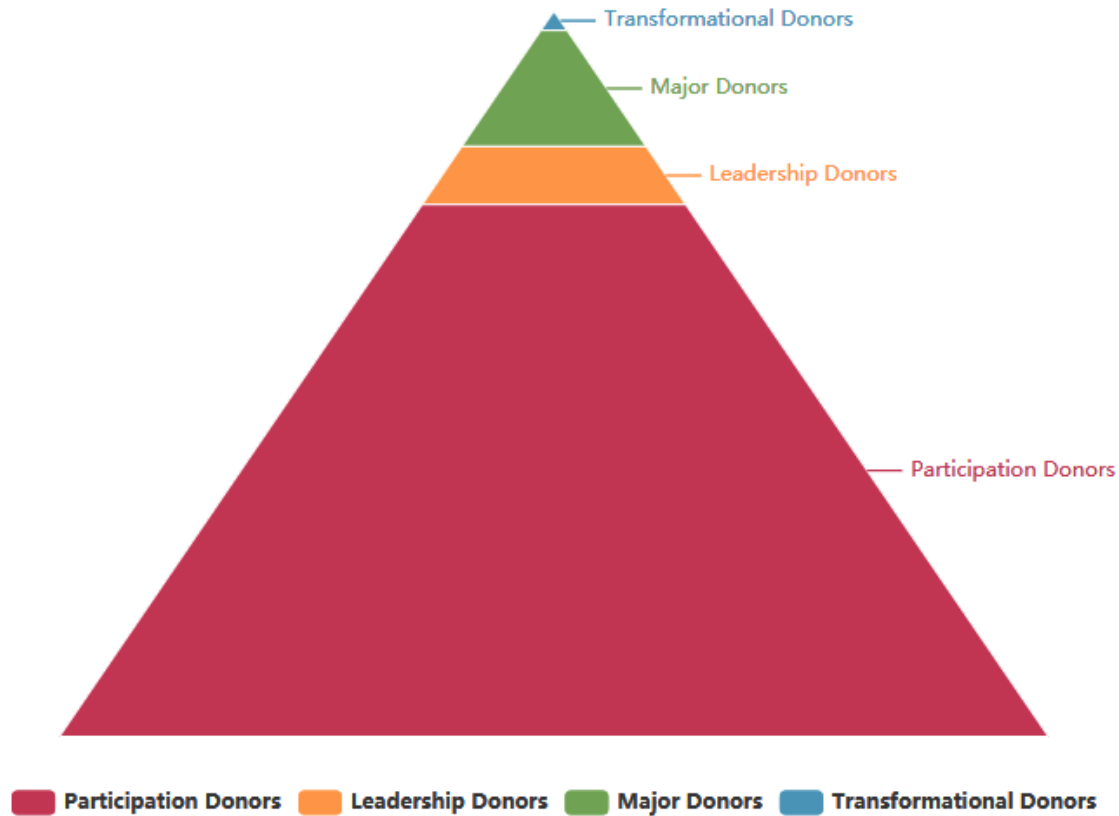
Length of Top Donors' Giving Histories Prior to Biggest Gift

Philanthropy Leadership Council, 2006



- It is nine times more likely that a donor who upgrades consistently will become a major donor
- 80 percent of alumni major donors make consistent gifts in the first five years following graduation

And...when it's not.



And...when it's not.

- Drops in participation/upgrades
- Lack of moves management
- Bulges at the bottom and top, nothing in the middle



Why Collaborate?

- Mitigate Risks
- Maximize Rewards
 - Donor Centric Fundraising
 - Consistent Messaging
 - Telling one story
 - Right hands knows what left is up to
 - We will raise more money!



Goal:

Build bridges between major and annual giving teams to help donors fully realize their philanthropic potential for your organization



Overview

- Terminology
- Concerns and Barriers to Success
- Framework for Shared Success
- Tricks for Tomorrow and FY 20 Planning

Lost in Translation

- Annual Giving?
 - Unrestricted and/or temp-restricted, Annual Fund, Fund for _____, yearly giving, participation giving, multi-modal giving, cash, those annoying calls I get from students.
- Major Giving?
 - Personal solicitation, Principal gifts, transformational gifts, lifetime largest gift, endowed fund, naming, mixed assets, gift plans, the person who names the newest building on campus.
- What's our purpose?

Motivators & Metrics: Annual Giving

- Participation
- Unrestricted and/or restricted dollars
- Donor acquisition (new donors)
- Retention
- Recent alumni acquisition
- Giving societies
- Leadership annual giving/portfolio work
- Motivator: Building culture of philanthropy

Motivators & Metrics: Major Giving

- Visits
- Proposals/solicitations
- Closures
- “Moves”
- Managing expectations and relationships
 - Donors, leaders, faculty, administration
- Strategic planning: realizing the vision, project development/oversight



What keeps us up at night?



We are all being asked to raise more money.



What is preventing collaboration?

*“A **house divided** against itself cannot stand. I believe this government cannot endure, permanently half slave and half free. I do not expect the Union to be dissolved—I do not expect the **house** to fall—but I do expect it will cease to be **divided**. It will become all one thing, or all the other.”*



Inter-office Impact on Pipeline

- Competition for Resources
- Competition for Prospects/Dollars
- Culture
 - Status, Perception and Recognition
 - Leadership
 - Structure
 - Human Behavior

Healing the Breach

- Increase transparency and trust by sharing goals
- Build shared goals using strategic and operational plans
- Connect ‘big picture’ goals to day-to-day collaboration

Fleshing out the Pipeline

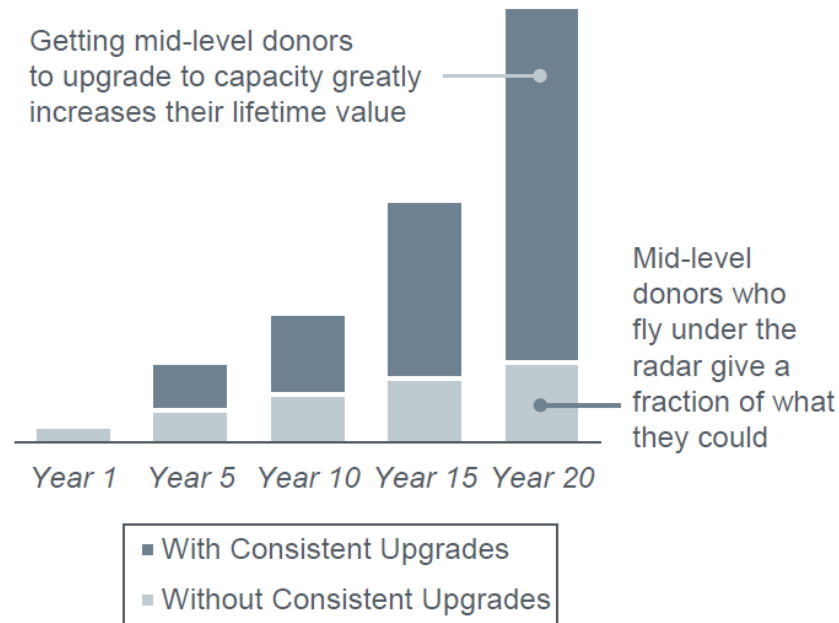
- Finding Hidden Potential
 - First Gift/“Big” Gift
 - Upgrades
 - Uber loyals
- Preventing Loss/Waste
 - Donor dropoff/Missed anniversary
 - Downgraded gifts
- Improving portfolio management
 - Moving them up or out



Pipeline Opportunity: Leadership Annual Giving

Cumulative Giving of Mid-Level Donors

With and Without Consistent Upgrades



Creative Pipelining

- Identify prospect work that's already happening or easy to add on
 - Discovery work? Introductions?
 - Who is staffing alumni and donor events?
- Upgraded asks as part of stewardship
- Prospect management
- Portfolios for all?



Pathways for Bigger Collaboration

- University- or Advancement-wide Initiatives
 - Days of Giving
 - Reunions/Homecoming/Alumni Weekend
 - Boards (or leadership volunteers)



Tricks for Tomorrow and FY'20

- Establish regular pipeline meetings
- Share existing reports/build new ones
- Ignite some change (however small!)
- Develop collaborative policies



Questions?

Contact us

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