



Your Mission is Our Mission. Our Team is Your Team.

MAJOR GIFTS STRATEGY

Objective: To create a strategic infrastructure for major gifts that focuses upon engaging individuals making unrestricted, multi-year pledges. Black Fox Philanthropy will help you create and successfully implement a major gifts strategy by delivering the following:

Deliverable: Funder Profiles

Black Fox Philanthropy will work with you to identify four (4) important funders and partners who are willing to talk with us about their relationships to your organization. These funders will be profiled by Black Fox Philanthropy's CEO Natalie Rekstad, also a philanthropist. The resulting interviews with donors are often quite candid, providing insights that are vital to understanding what compels individuals to donate to your organization, but the profiles are also designed to uncover what would compel each of the funders to deepen their engagement, particularly around major gifts pledges and participation via engaging their networks. We will produce a report covering both specific feedback and general themes from the interviews. This insight will help with a variety of processes, including core messaging for the major gifts program, solicitation, and stewardship.

Deliverable: Data Analysis/Wealth Screen

The Black Fox Team will take a deep dive into donor data reports and analysis created regarding current funding mix, size of gifts, donor attrition, and geographical concentrations. We will also do a wealth screen of 1,000 funders in your database to identify key candidates for a major gifts program, and their capacity for giving at the \$10,000 - \$50,000 and above level. Optional Add on: \$750 per 500 to screen more names in your database to assess quality and viability of potential individual funders.

Deliverable: Creation of Major Gifts Strategy

Black Fox Philanthropy will develop a comprehensive, tailored fundraising strategy for major gifts that will include a strategy for cultivation, solicitation and stewardship of major funders. This strategy will build upon your many existing relationships and

strengths while incorporating new approaches and audiences to attracting sustainable relationships and funding. Our recommendations will include strategy for each of the following areas:

- A comprehensive major gifts program that includes:
 - Name and design of a giving club/society (example name: Visionary Society) that is aspirational and marketed as a long-term, highest-level investment in your mission and vision
 - A plan to engage new individuals, re-engage lapsed donors and reconnect with long-dormant individuals in your funder database during a “quiet phase” before a public launch
 - An emphasis on securing three-year commitments (vs. the current two-year) for longer-term strategic planning
 - An emphasis upon unrestricted gifts
- Leveraging the involvement of board members in securing major gifts
- Special events strategy that enhances major gifts/individual engagement
- Funder relations and stewardship plan focused upon building community among your funders, a vital component to cultivating loyalty and increased giving

Deliverable: Suite of Materials for Engaging Major Individual Funders

Persuasive messages and communication tools are the underpinning of an effective major gifts program. Messages must forge a connection with your audience by speaking to the heart and then the mind. Ultimately, effective communications pieces require a unique narrative that builds a strong case for support while setting you apart from other worthy organizations working in your issue area. Our seasoned communications professionals understand the nexus between messaging and fundraising. We will work with your part-time communications professional to develop smart, targeted, inspiring messages and other communications assets that will connect with new funders and deepen relationships with existing ones.

Black Fox Philanthropy will deliver a suite of communications materials based on your core messaging and narrative. Our primary objective is to ensure that your narrative builds upon your existing track record with individual funders while capturing messaging for a new era of possibility as you triple your budget and impact. The communications pieces will be designed to clearly and effectively convey to prospective major funders your value proposition, vision for greater impact, and how their investment in your organization will have a profound effect in your target localities. We ensure that materials can be adapted and personally customized to take advantage of future fundraising opportunities and that your messaging is presented

uniformly and effectively across all public-facing marketing materials, collateral pieces, and communications.

Key components of this deliverable include:

- Compelling core messaging that is woven into major gifts and all funder-facing communications.
- Custom pitch materials that align with your branding and present a compelling opportunity for investment
- Suite of engagement letters and emails

Deliverable: Support During Major Gifts Program Rollout

During the quiet and rollout phase, Black Fox will provide thought partnership, brainstorming and troubleshooting through hour-long phone or videoconference sessions with you on a weekly basis for ninety days, then bi-weekly thereafter for the remainder of the engagement. This ensures that all milestones are tracking as projected, and new opportunities maximized.

Our scope also includes cumulative three (3) hours of high stakes-meetings/solicitation-focused coaching sessions with Natalie Rekstad. These sessions can be broken out into segments of thirty (30) minutes or more.

Deliverable: Board Fundraising Retreat

Black Fox Philanthropy understands that successful fundraising is very much a team engagement for staff and board members alike. We have developed a workshop that is designed to increase staff and board engagement around major gifts and to motivate the team to take concretely-defined actions to advance your fundraising success. This two-hour capacity-building workshop can include the following elements; however, will be customized based upon pre-workshop needs analysis:

Fundraising Self-ID Exercise

A core ingredient in developing a successful fundraising board is for each member to identify, not if, but how they are a fundraiser: Asker, Connector, or Nurturer. Gaining clarity around a dominant type enables you to stretch the boundaries of your comfort zone without going completely into unnatural territory. This also enables the development staff to quarterback board members most effectively in roles that maximize each board members' unique strengths.

The Power of Story | Crafting Your Why

While TeachUNITED has an overarching narrative around their work, developing and articulating a personal narrative around why this work is vital and unique to each member of your board provides an opportunity for funders to connect on an emotional level, enabling them to relate to the people behind the mission. Once clear and articulated, the narratives also deepen the commitment of your staff and board toward the organization, the mission, and each other. This is a key element as there are many new board members, and this can be foundational as they grow into their calling in serving the mission of TeachUNITED.

The Art of Engaging Your Networks

Black Fox Philanthropy has developed Openers and Asks that are suited to each type of board member (Asker, Connector, Nurturer); however, note that each of us are all three types but have a dominant type that is our “Zone of Genius.” This segment equips board members with an approach and language that increases the comfort level in approaching their networks, while upping the odds for successful engagement.

Leading the Donor Dance

This choreography is designed to create deep relationships in an authentic, partnership-driven way through revealing your donors’ emotional link to your mission, build your and your organization’s credibility, and develop lasting relationships that make the tough and necessary work of fundraising more fulfilling for all involved.

Strengthening Funder Relationships

Your funders can be your greatest champions and thought-partners. Board members, particularly “Nurturers”, can engage these supporters as your allies through a process of understanding what is most deeply appealing to them about your organization, what would increase their engagement, and learning how to uniquely steward them in a way that will motivate them to stay personally and financially invested long-term.

Time and Financial Investment: Twelve-Month Engagement; \$30,000 – \$40,000 investment based upon level of support provided, including in person board retreat(s). Optional continued month-to-month support at \$1,500 per month.