

The Key to Success in Major Gifts: Implementing a Big-League Relationship Management Program for Your Small Shop

December 9, 2010

Timothy J. Dougherty, VP for Advancement, UWC-USA

The 80:20 Rule

has evolved...

**THE 95:5 RULE
IS THE NEW REALITY**

The New York Times

“According to our analysis one-half of 1 percent of our donors have given 75% of the (\$3.2B) campaign total”

*Inge Reichenbach,
VP for Development,
Yale University
November 11, 2010*

Growing Disparity in Income and Wealth Since Early Eighties

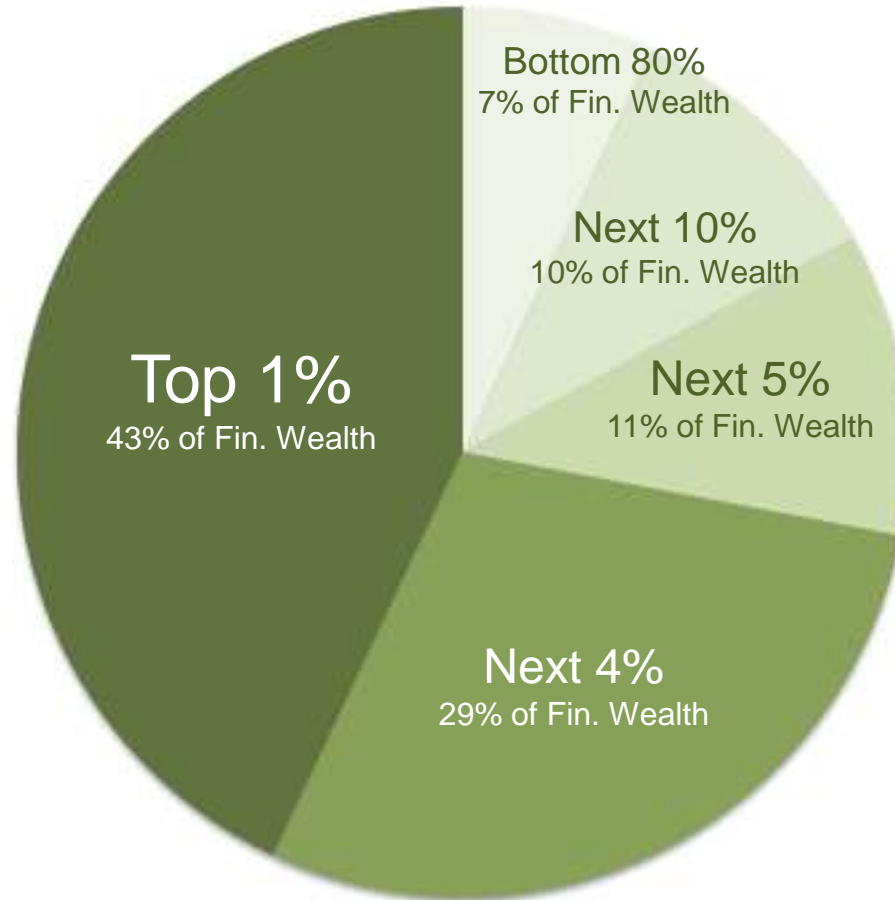
Income: Top 1% from 13% to 21%

Wealth: Top 1% from 21% to 35%

of millionaires from 2.4M to 6.7M

Source: Wolff 2010

Financial Wealth Distribution in the U.S. 2007



The Power of Philanthropy



Pyramid is now Witch's Hat

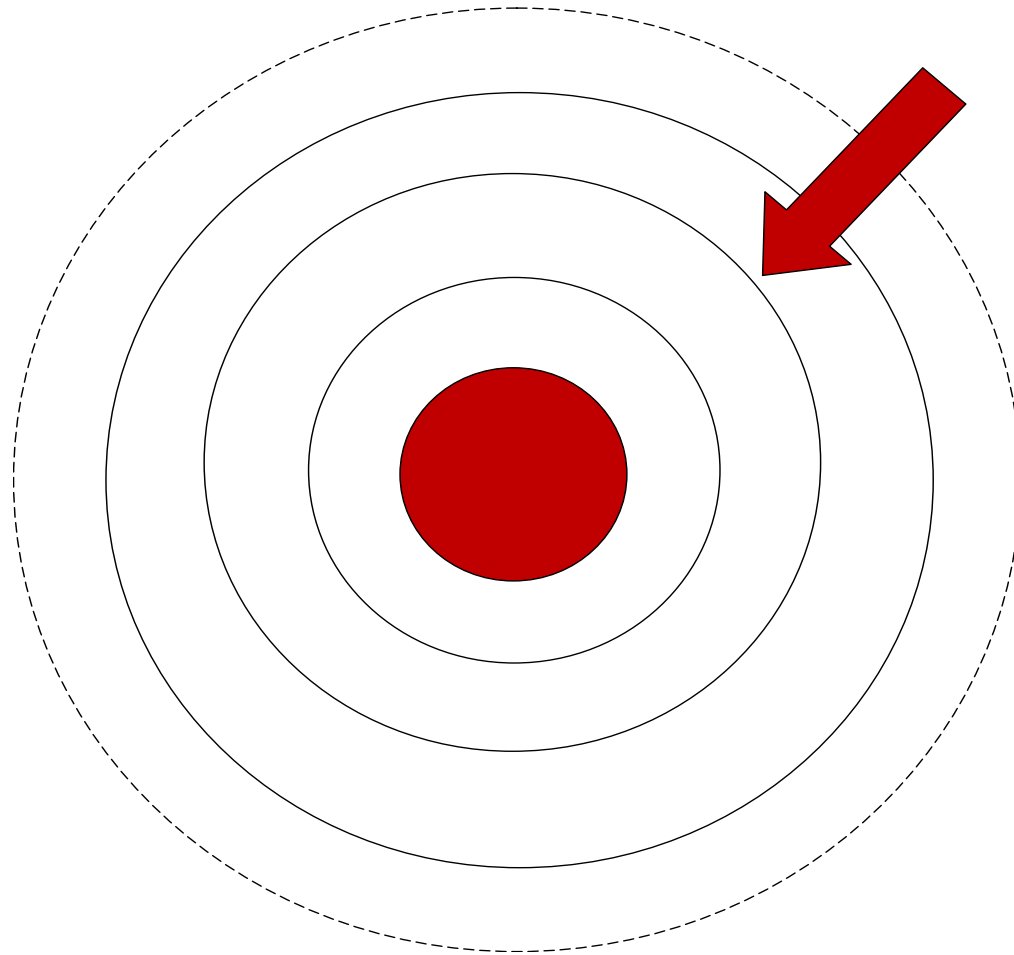
Dollars



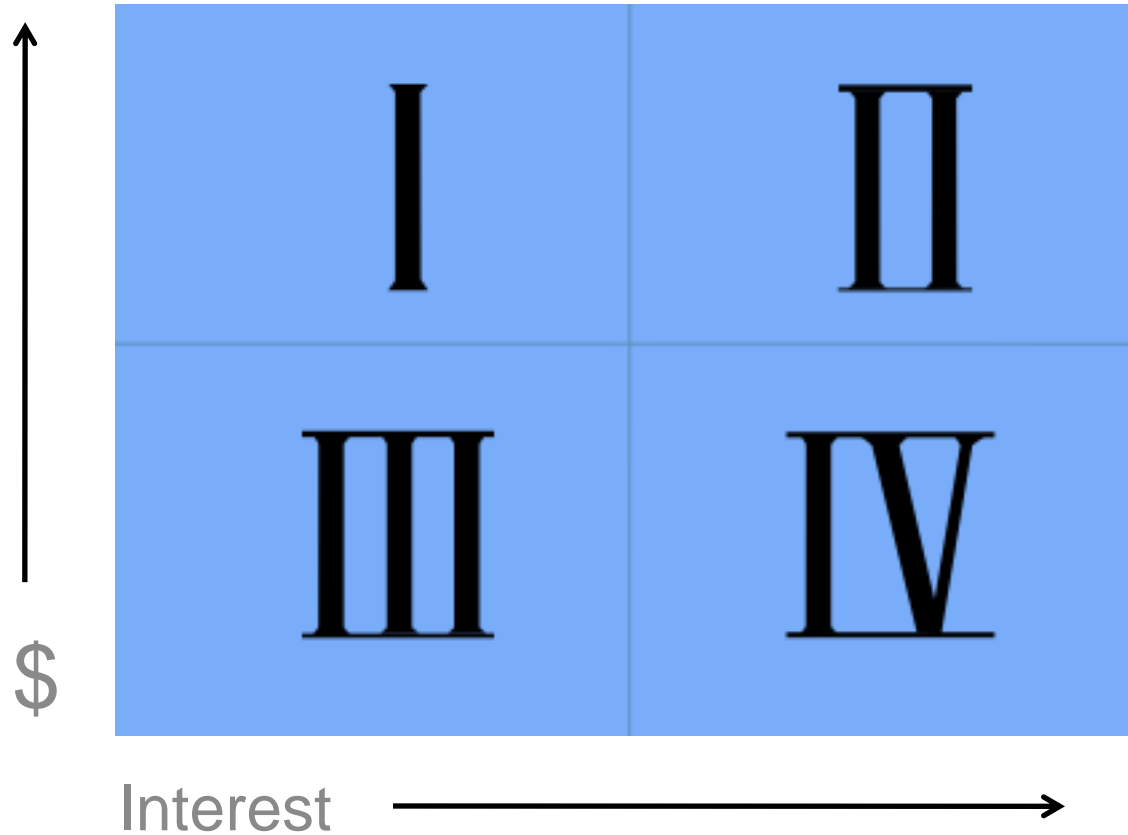
of Donors



Engagement



Linkage, Interest and Ability



The Secret of Success in Fundraising

To create a sustainable fund-raising program....

1. Focus on those with:
Linkage, Interest, and Ability
2. Move them up the pyramid
3. Bring them into the circle.
4. Ask them for money!!!!

Asking for Money

1. If you don't ask, you won't get
2. The first gift is just the beginning:
Have a long-term, relationship-
building orientation
3. The more personal the solicitation the
better

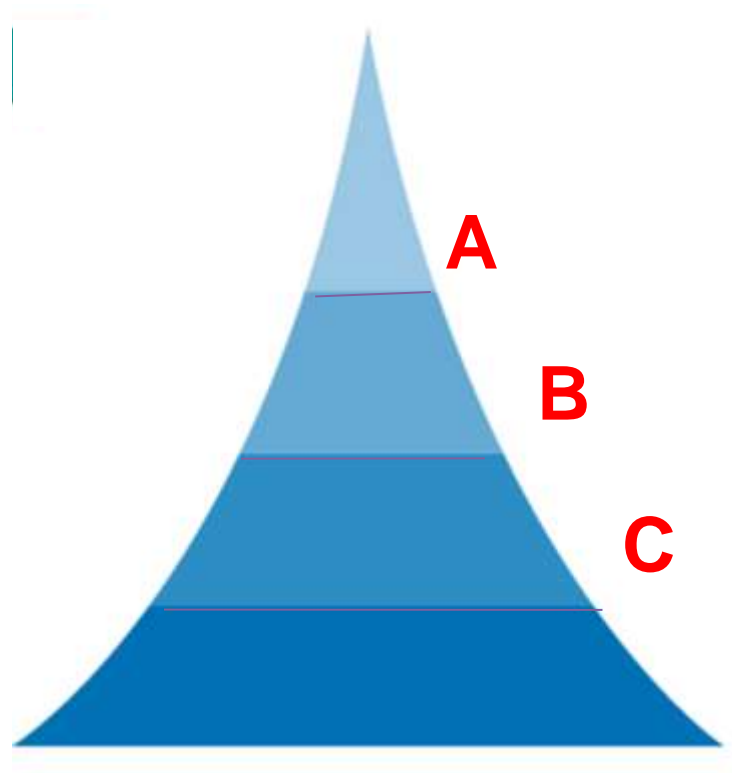
Don't be shy!

Many whom I asked to join me at Castle Club level didn't feel comfortable, but gladly contributed what they could- and that's just great. On the other hand, some were indeed willing to participate at these levels, but they wouldn't have done so unless they were made aware of the challenges and opportunities. Simply put, don't ask, don't get.

... The risk of alienating someone for requesting their substantial support ...is, in my view, minimal compared to the risk of leaving a lot of money on the table because we simply did not ask. Use best judgment based on your personal relationships, but don't be shy.

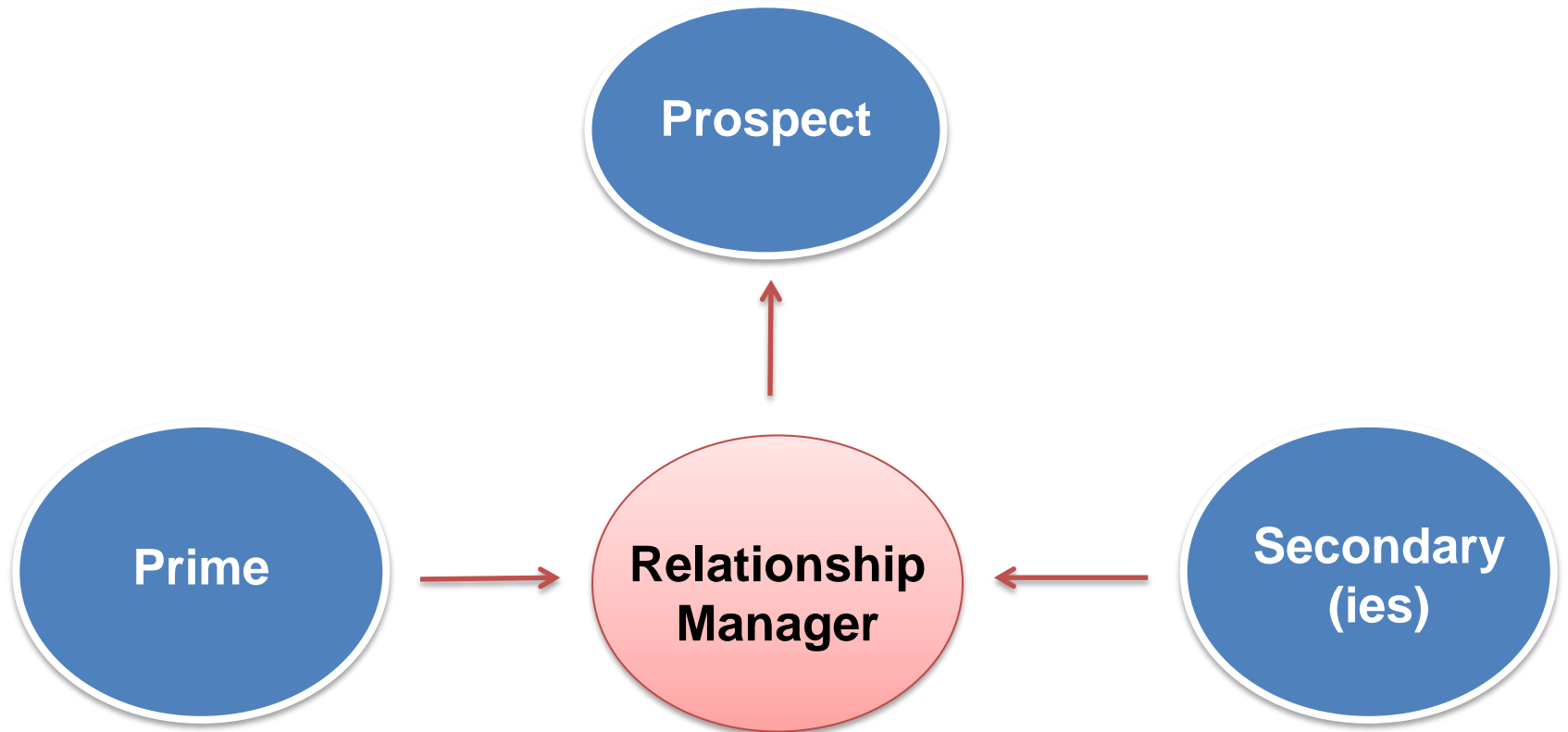
UWC-USA Annual-Fund Committee Volunteer,
Class of '91
December 5, 2010

Relationship-Management System

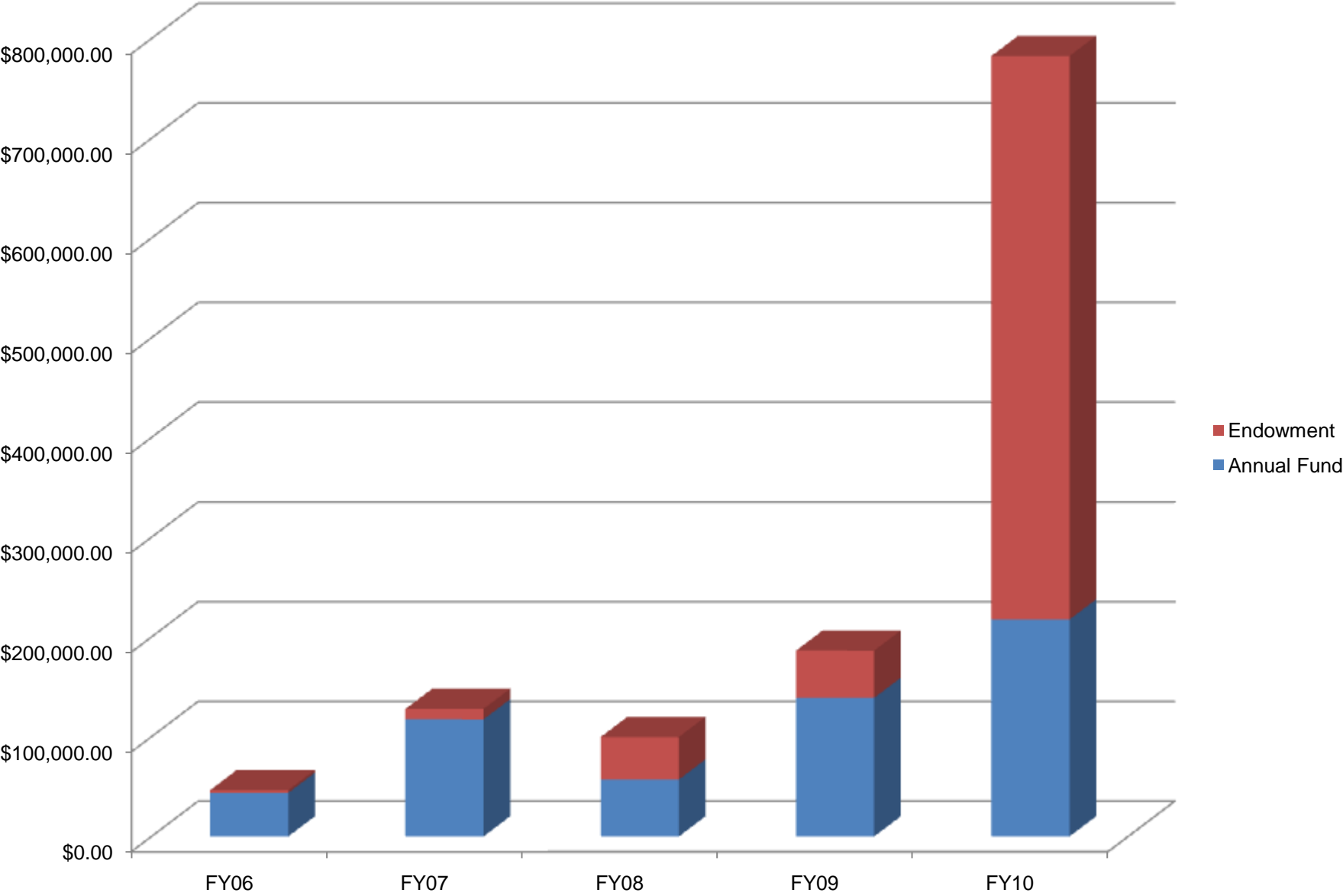


Focus time and energy on the top of your prospect pyramid.

Relationship Management



UWC-USA Alumni Giving, FY06 to FY10



Take Aways

1. 80:20 is now more like 95:5
2. Focus efforts on your top 5-10%
3. In major gifts, activity drives results, so get out there!

Thank you