



THE DIARY OF A LEAD GIFT

July 27, 2022



OPENING PRAYER



Michael Murphy

Executive
Director

ICSC

*ICSC CONFERENCE
ANAHEIM, CALIFORNIA
OCTOBER 2-5, 2022*



Heavenly Father,

You are the source of wisdom and grace, the author of human freedom and creativity. We thank you for these gifts, and ask that you teach us to be good stewards of our creative energies.

During this summer season, show us how to slow down just a bit, quiet ourselves, and learn the art of re-creation, reflection and relaxation.

Encourage us to pause so that we might recharge and re-energize our minds, bodies and spirits for the journey ahead of us.

Help us never to be too busy to realize your gracious presence all around us: in nature, in other people, and in ourselves.

And teach us to be better stewards of your creation and our time of recreation.

We pray this in Jesus' name.

Amen.

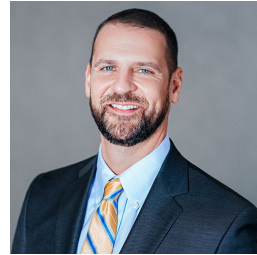
TODAY'S PRESENTERS



Brian Doyle
Mission Advancement Officer
Diocese of Toledo



Tom Kissane
Partner and Managing Director
CCS Fundraising



Brad Patterson
Senior Vice President
CCS Fundraising



Sarah Schmall
Executive Vice President
CCS Fundraising



Shawn Trahan Taylor
Assistant Vice President
CCS Fundraising

TODAY'S OBJECTIVES

1

IDENTIFYING EMERGING TRENDS AND DATA

2

DEFINING THE LEAD GIFT PROCESS

3

CASE STUDIES

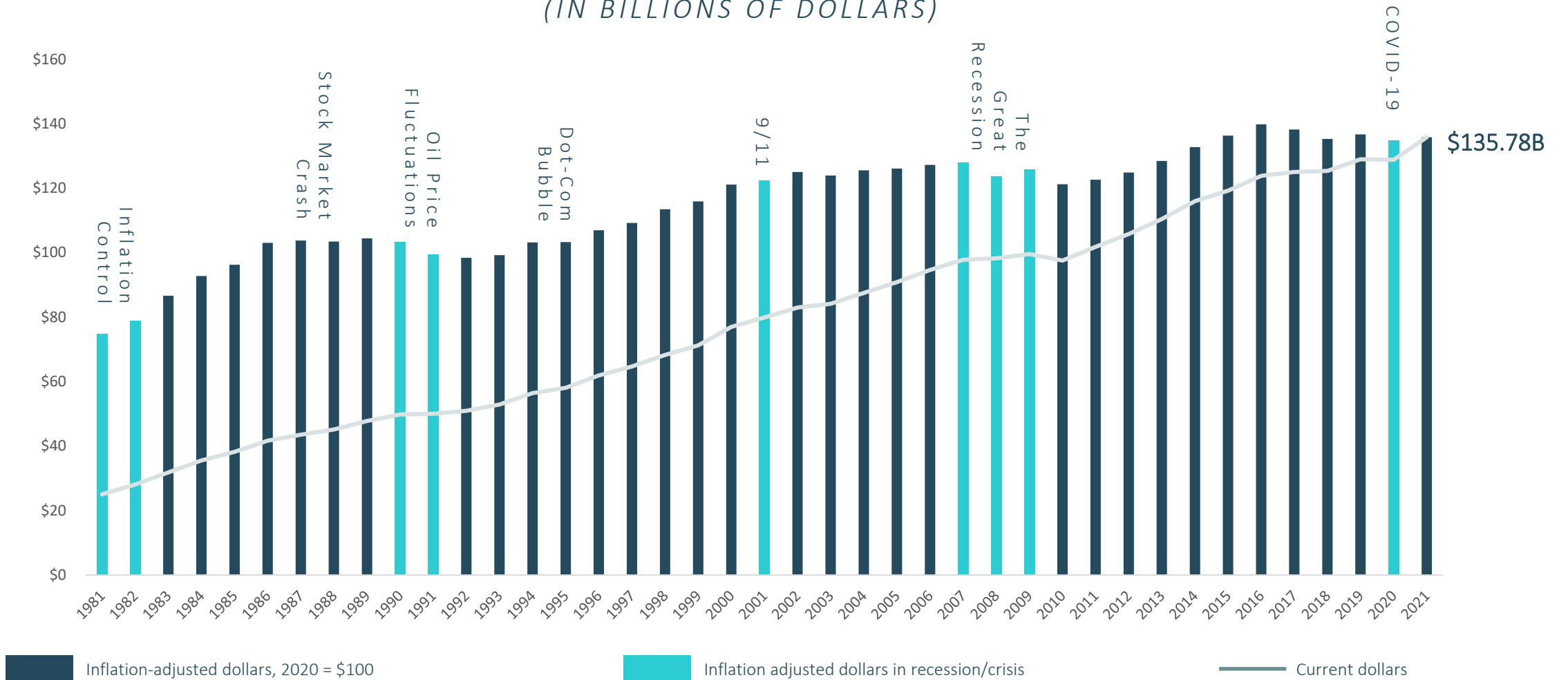
4

ACTIONABLE TAKEAWAYS

IDENTIFYING EMERGING TRENDS AND DATA

GIVING TO RELIGION INCREASED 0.7% IN 2021

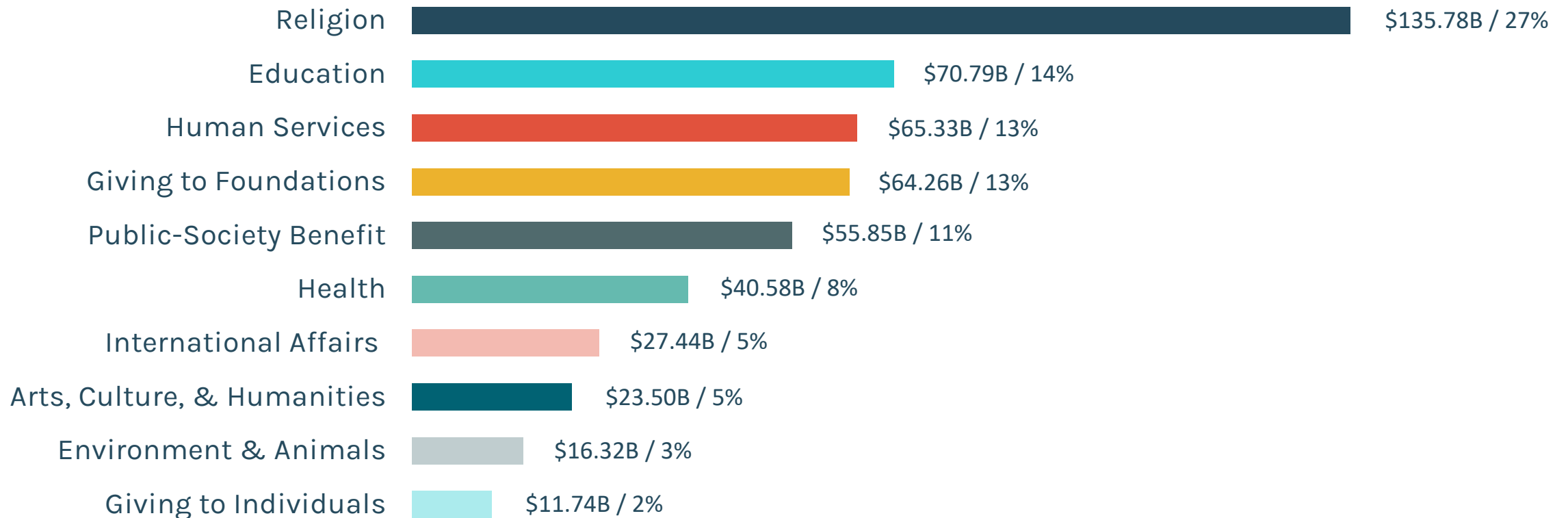
TOTAL GIVING TO RELIGION 1981-2021
(IN BILLIONS OF DOLLARS)



GIVING TO RELIGION STILL HIGHEST OF ALL SECTORS AT \$135.78B

Ten years ago, religion comprised 35% of all giving, but amounted to \$100.63B.

GIVING BY RECIPIENT TYPE



SELF-IDENTIFIED CATHOLICS REMAIN ENGAGED



16.6K

Catholic parishes in the
United States



72.4M

self-identified
Catholics



37%

attended or view
Mass monthly



35%

say the pandemic has
strengthened their faith

Source: Georgetown University [Church Statistics \(2022\)](#); Center for Applied Research in the Apostolate, ["U.S. Catholics Adapting to New Realities,"](#) March 2021; Pew Research Center, ["More Americans Than People in Other Advanced Economies Say COVID-19 Has Strengthened Religious Faith,"](#) July 2021

OPPORTUNITY IN A LEAD GIFTS LANDSCAPE



49%

of the general population households give (average gift: \$2,581)



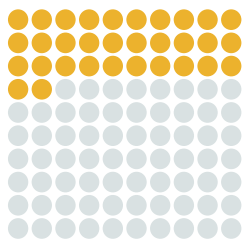
88%

of affluent* households give (average gift: \$43,195)



47%

of affluent households gave to religious causes



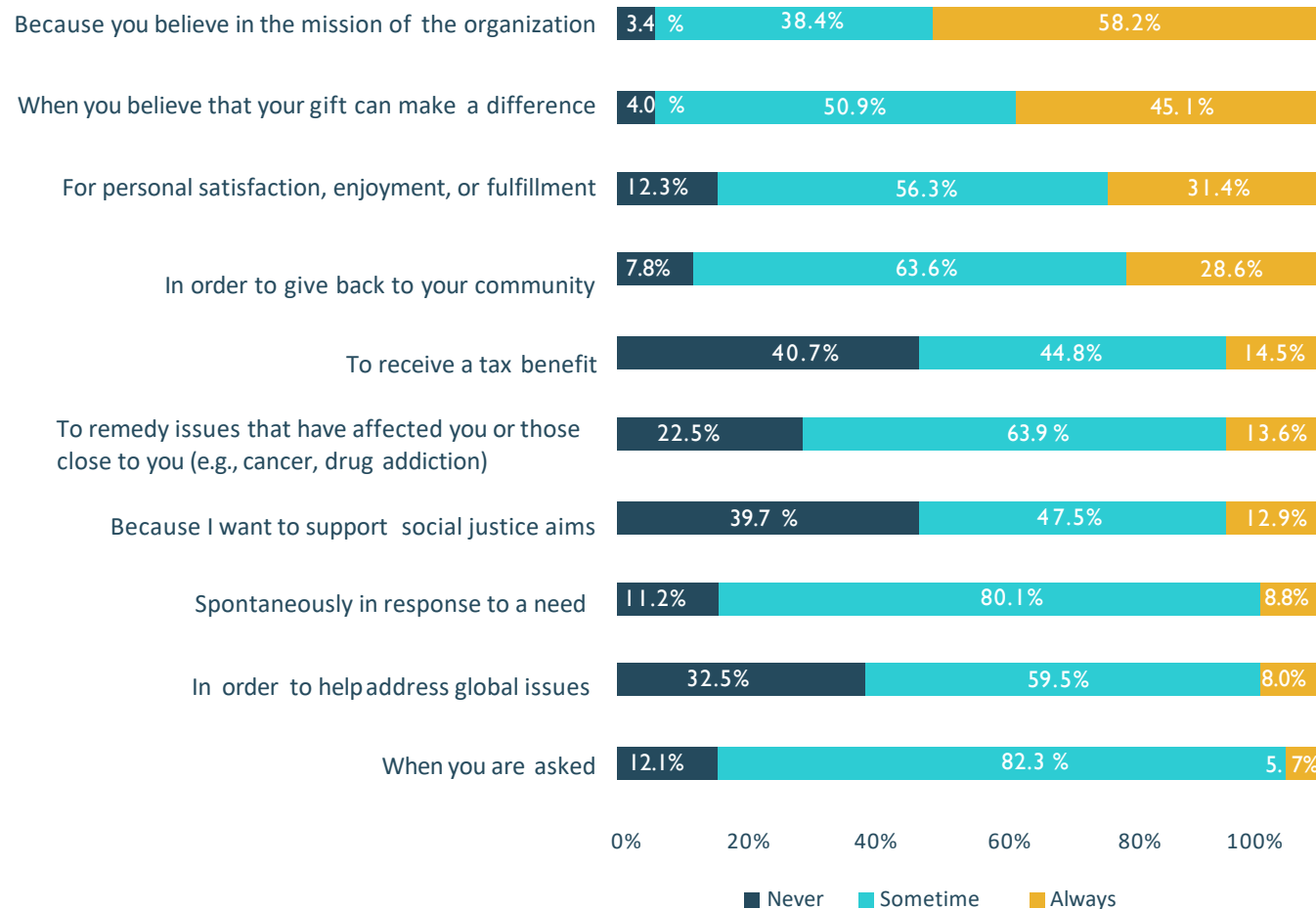
32%

of charitable dollars from affluent donors went to religion, the highest share of all charitable categories

** "Affluent" households are defined in this study as those with either an annual household income of at least \$200,000 and/or a net worth of at least \$1 million, excluding primary residence. Note that the trends on the previous page apply to the general United States population.*

AFFLUENT DONORS GIVE FOR MISSION AND IMPACT

AFFLUENT DONORS REPORT GIVING BASED ON MOTIVATION TYPE



TRENDS AMONG LEAD DONORS

DONORS ARE:

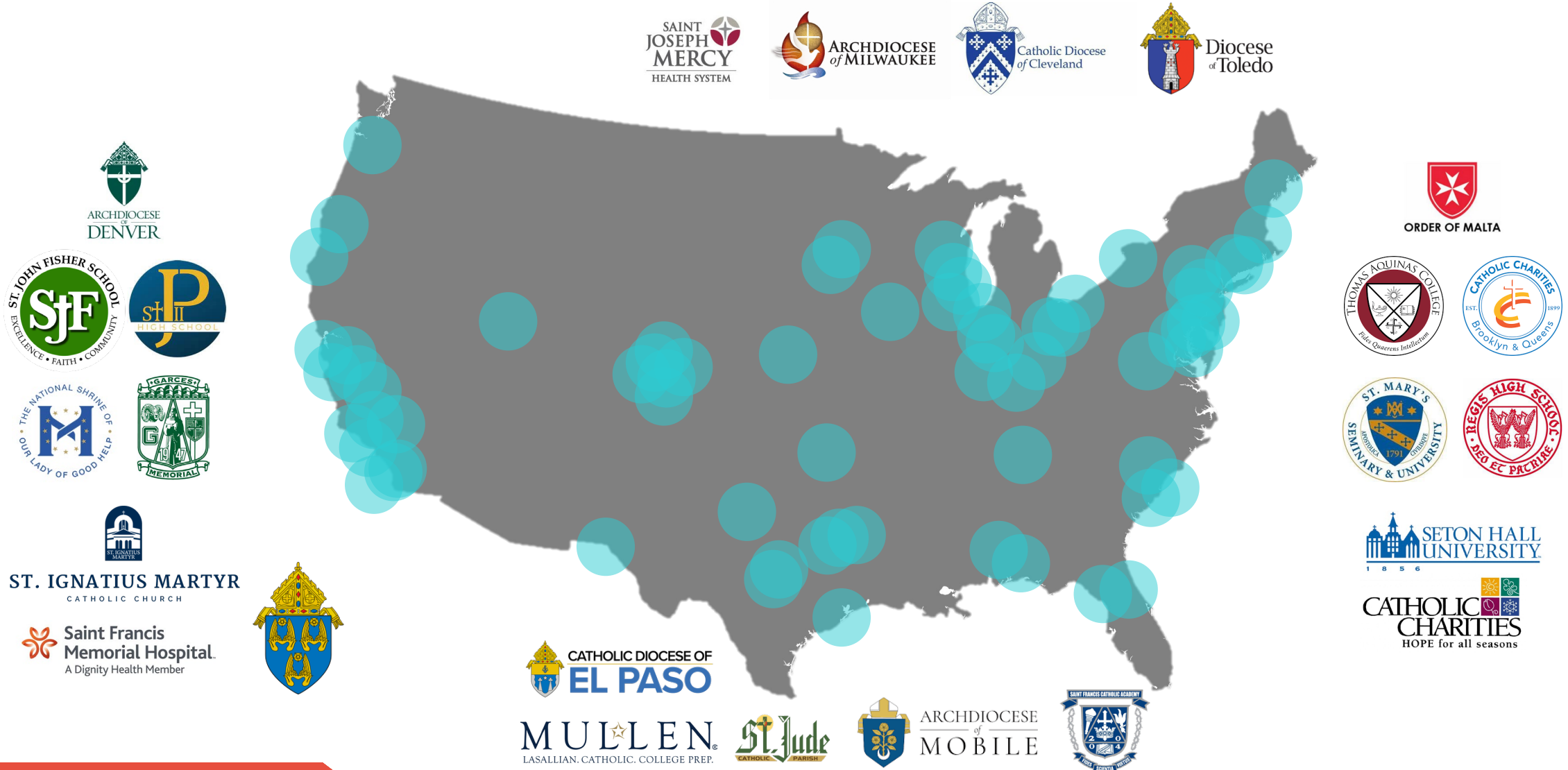
Increasingly
solution-oriented

Interested in more than
just capital giving

Bundling their gifts

Influenced by clergy
and the bishop

THREE YEARS OF LEAD GIFTS ACROSS THE US



DEFINING THE LEAD GIFT PROCESS

DEVELOP A STRATEGY FOR THE PROSPECT

Previous Giving	What is the history? If so, what motivated it?
Research	Are they capable? Connected? Does the request amount make sense? What can the pastor identify?
Request Timing	When will we ask this prospect, and why then?
Clear Rationale and Giving Impact	What is the measurable impact on the church, program, parish, other donors, etc.?
The Solicitation Team	Who can influence the prospect? Does the team reflect the magnitude of the request?
Power of Influence	Are there other donors who should be involved?
Defined Solicitor Roles	Does everyone know what to say and when?
Gift Recognition and Other Materials	Have we created a tailored and specific proposal that expresses appreciation, shows renderings, mock-ups, budgets, stories?

HOW TO IDENTIFY A POTENTIAL LEAD DONOR



Capture and update contacts
within your database



Wealth screen regularly



Conduct a segmentation
analysis



Monitor annual appeal
responses

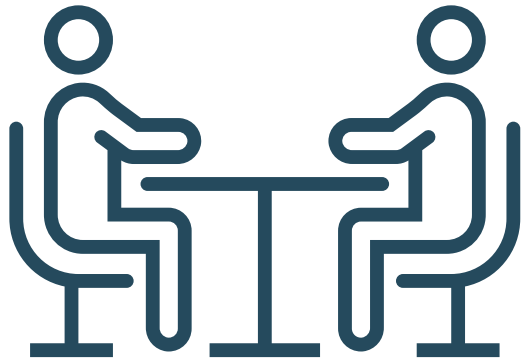


Have candid conversations
about moves management



Conduct individualized
donor research

BRIEF THE DONOR IN ADVANCE OF THE REQUEST



- Establish a formal meeting
- Thank your donors for their support, philanthropic and otherwise
- Discuss the case for support in-depth
- Ask about the donor's interest in your case
- Request deeper engagement

SOLICIT THE GIFT

TAILOR YOUR SOLICITATION TO YOUR DONOR'S UNIQUE INTERESTS AND PREFERENCES.

Review key areas
of interest in case
for support

Affirm a donor's
previous giving

Articulate the direct
impact of a gift to
special case elements

Invite donor to consider
a specific gift amount

Present different gift
giving options

Follow up

STEWARD YOUR DONOR



Continue
leadership
engagement



Thank and
recognize the
donor



Provide regular
updates on impact
of their giving



Invite donor to
identify and steward
other donors

CASE STUDIES

HISTORY OF TOLEDO'S DEVELOPMENT EFFORTS

HISTORY

- ~1990: Last Diocesan Campaign
- 2018: Foundation Assessment
- 2019: Pastoral Plan Completed
- 2019: Feasibility Study Completed
- Ongoing: Minimal Stewardship and Development Operations, Bishop Dissolved Previous Foundation
- Current: Diocesan-Wide Capital and Endowment Campaign



DETAILS OF TOLEDO DONOR

CULTIVATION

- Board member of previous foundation
- Committee member of foundation planning
- Pastoral plan participant
- On search committee for DOD position
- Member of finance committee

CAPACITY

- A top ten lifetime donor in Diocese history
- Indicated \$1M gift during feasibility study
- Has a family foundation
- End of year appeal gifts of \$30 to \$50K

TAKEAWAYS FROM TOLEDO'S EXPERIENCE

Think deeply about opportunities for every large donor

Look for obstacles and take the time to face them first

If wondering, ask the donor

Take time to identify past generosity

Make the case and demonstrate ability to achieve your goals

Be bold with your request, but ensure the request is carefully researched and discussed

ARCHDIOCESE OF LOS ANGELES FUNDRAISING HISTORY

HISTORY

- 1950's: Last Archdiocesan Campaign to Build Schools
- 2014: Catholic Community Foundation of Los Angeles Formed
- 2017-2018: Increased Offertory Appeals
- 2017: Facilities Deferred Maintenance Assessment
- 2017: Feasibility Study Completed
- Ongoing: Annual Appeal
- Current: Archdiocesan-wide Capital Campaign



Cathedral of Our Lady of the Angels, Los Angeles

DONOR INFORMATION AND CULTIVATION

DONOR INFORMATION

- Donor since 1999
- Total giving to Archdiocese, \$2.1 million
- A top lifetime donor to the annual appeal
- Planned Giving donor
- Strong commitment to supporting education
- Contributed \$1 million in early phases of the Archdiocesan-wide campaign
- Verbal commitment of an additional \$1 million to be paid over the next two years

CULTIVATION

- Board of Trustees, Catholic Education Foundation
- Cardinal's Award recipient
- Family's participation in Feasibility Study
- Volunteer leadership at Parish

TAKEAWAYS FROM LOS ANGELES' EXPERIENCE

Be creative when brainstorming potential opportunities for every donor and consider past generosity

Don't assume a donor will not consider an additional gift to an ongoing fundraising initiative

Aim highly yet realistically

Anticipate questions regarding why contribute an additional gift when the donor has previously contributed to the fundraising effort in which you are seeking additional support

Be thoughtful about who should be in the room and their role

Be intentional about stewardship

Q&A

KEY TAKEAWAYS

1

Identify your unique differentiators or opportunities

2

Harvest and uncover big ideas through conversations

3

Involve leadership

4

Ask the right questions

5

Identify the best prospects

6

Deploy a strategic approach

7

Apply the questions lens to improve fundraising strategies of all sizes

THANK YOU FOR JOINING US!

