

Develop a Gift Range Chart and Customized Gift Strings to Maximize Year-End Fundraising

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A Bit About Your Presenter

- Over 20+ years working with nonprofits from small, regional, and national organizations.
- Owner of Development Consulting Solutions.
- CFRE and MA in Philanthropy and Fund Development raised over millions in campaigns.
- Organized and implemented campaigns all throughout the Northeast.
- On a mission to transform organizations and philanthropy through effective fund development!

This is it!

Quite simply the most important thing that you will do
for your year-end fundraising campaign.

It is the cornerstone of your campaign by outlining
the number of gifts needed and at what levels.

It is the roadmap to GOAL!

Develop a Gift Range Chart and Customized Gift Strings to Maximize Year-End Fundraising

In this session, you'll maximize your year-end giving by:

- Developing a gift range chart for your specific fundraising goal
- Learn how to use the gift range chart to monitor and report on your efforts
- Create custom gift strings for a variety of identified donor segments

Poll:

***How many have developed a gift range
chart before?***

Developing a gift range chart

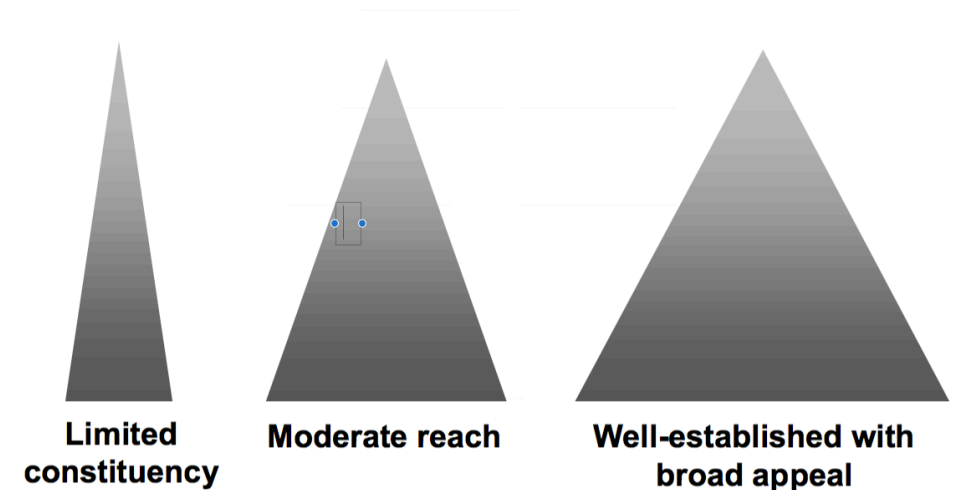
Gift range	# of gifts required	# of prospects required	Subtotal	Cumulative Total	Cumulative %
\$50,000	1	4	\$50,000	\$ 50,000	10%
\$38,000	1	4	\$38,000	\$ 88,000	18%
\$25,000	2	8	\$50,000	\$138,000	28%
\$19,000	3	12	\$57,000	\$195,000	39%
\$13,000	5	20	\$65,000	\$260,000	52%
\$9,400	8	32	\$75,200	\$335,200	67%
\$6,300	10	40	\$63,000	\$398,200	80%
\$3,200	12	48	\$38,400	\$436,600	87%
\$1,300	12	48	\$15,600	\$452,200	90%
Under \$1,300	73	294	\$48,000	\$500,000	100%
Totals	127	510		\$500,000	

Why do you need one?

1. A gift range chart shows the patterns of giving needed to reach your fundraising goal
2. Tells you exactly how many gifts AND prospects you need at each giving level to reach the goal
3. Varies for each organization
4. Establishes giving levels for named gift opportunities if you are offering them

What you need to know

1. Today, 5-10% of the donors provide 85-95% of the goal
2. Gift charts vary for different organizations depending upon maturity
3. Need to adapt the standard pattern to fit your organization and its maturity level



How do you create one?

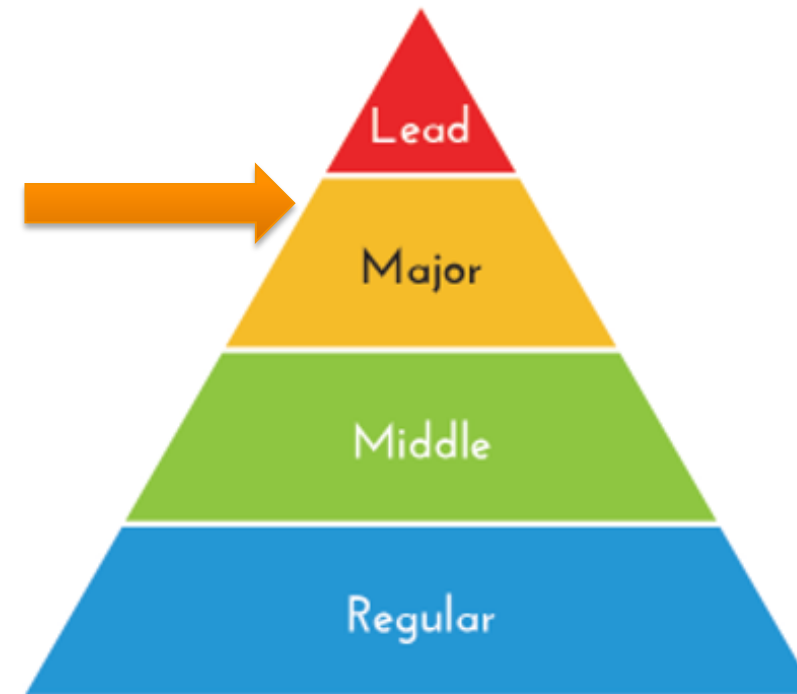
1. Well, you can use a “canned” gift range chart calculator
 - This is only an estimation tool
 - [Check it out here](#)

How do you create one?

2. Create your own and be more exact to your organization
 - Determine your fundraising goal

Step #1: Determine your “top” giving level

1. Lead Gifts – 40-60% of the goal



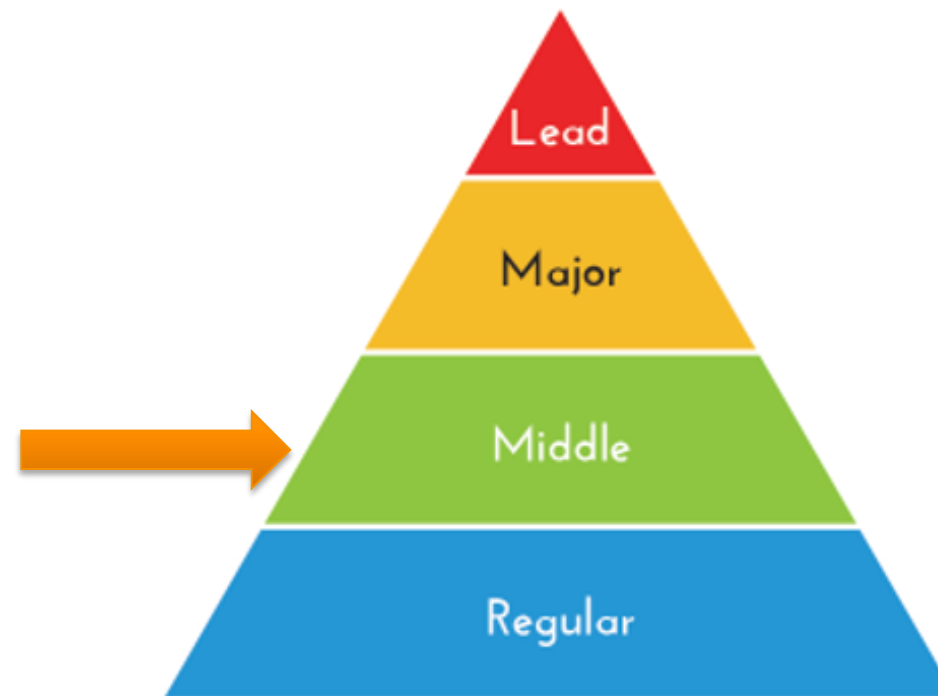
Step #1: Determine your “top” giving level

2. “Lead” Gifts – 40-60% of the goal

- One gift is about 10-20%
- Two to three large gifts 5-10%
- Four to six gifts at 2.5-5% of goal

Step #2: Determine your “middle” giving level

1. Mid-Range Gifts – 30-40% of the goal

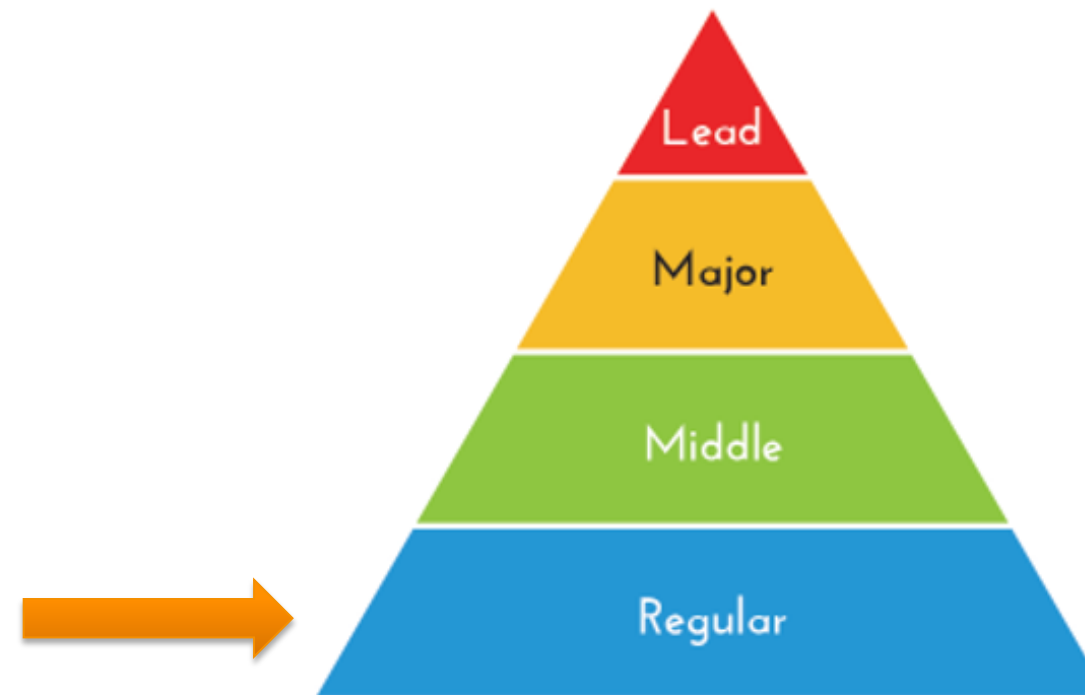


Step #2: Determine your “middle” giving level

2. “Mid-Range” Gifts – 30-40% of the goal
 - 30 to 60 gifts in 3 giving categories

Step #3 Determine your “Regular” giving level

1. Regular Gifts – 10-20% of the goal



Step #3: Determine your “Regular” giving level

2. “Regular” Gifts – 10-20% of the goal
 - All others at several lower levels

A few important things to remember

1. Identify the highest-level gift to your fundraising campaign.
This will probably be in the range of 10-20% of goal
2. Estimate 3-5 prospective donors per gift

A few important things to remember

3. Fill you chart downwards based on what you know about your donors and their capacity
4. The number of donors increases as you go down
5. Cut the size of gifts and double or triple donors needed
6. 80% of your goal comes from 20% of donors

Poll:

***Have you used a gift chart to inform
your annual campaign strategy?***

How do you use one????

Gift Range Chart

Goal Amount:

Gift Range	No. Gifts required	No. Prospects required	Subtotal	Cumulative total	Cumulative percentage
10,000.00	1	4	10,000.00	10,000.00	10%
7,500.00	1	4	7,500.00	17,500.00	18%
5,000.00	2	8	10,000.00	27,500.00	28%
3,500.00	3	12	10,500.00	38,000.00	38%
2,800.00	3	12	8,400.00	46,400.00	46%
2,300.00	5	20	11,500.00	57,900.00	58%
2,000.00	7	28	14,000.00	71,900.00	72%
1,500.00	7	28	10,500.00	82,400.00	82%
1,000.00	10	40	10,000.00	92,400.00	92%
Under 1,000.00	15	60	7,600.00	100,000.00	100%
Totals	54	216		100,000.00	

Use a gift chart to determine strategy

1. Top-gifts first
2. 1 @\$10K, 1 @\$7.5K, 2 @ \$5K, and 3 @ \$3.5K = \$38K
 - Grants (28 grants prospects)
 - Major donor prospects (28 major donor prospects)
 - Special event (1 event)

Use a gift chart to determine strategy

3. Middle second
4. \$34K (Level of \$1K to \$2,800 = 128 prospects)
 - Event
 - Direct mail campaign
 - Personal solicitations

Use a gift chart to determine strategy

5. Lower third

6. \$28K (Level under \$1K = 60 prospects)

- 1 direct mail appeal campaign
- 1 special event

Use a gift chart to monitor and report

1. Use the chart as a monitoring and reporting tool
2. Make mid-course corrections to strategy
3. “Lead” gifts are down – adjust gift chart down
4. Same with all other giving levels

Use a gift chart to monitor and report

5. Share this chart with your Board of Directors to educate them on
 - The process it takes to raise money
 - How efforts are progressing towards projections
 - Engage them in fund development efforts

Poll:

***Have you used personalized gift strings
in the past?***

What does a gift string look like?

Letter - Donor segment							
MOST RECENT DOLLAR RANGE	MOST RECENT GIFT DATE RANGE	KEY CODE	QUANTITY	GIFT ASK (REPLY)	GIFT ASK (LETTER)	POSTAGE	PKG. VERSION
Active (0-12 months)							
\$1000 AND OVER	9/1/13 TO PRESENT	15AFAL1A		\$ ____	default ask out	NPBS	window OE w/ special offer teaser; \$100+ form w/ special offer blurb in RD
\$500 TO \$999.99	9/1/13 TO PRESENT	15AFAL1B		LG+100 LG+150 LG OTHER	LG LG+100 LG+150	NPBS	window OE w/ special offer teaser; \$100+ form w/ special offer blurb in RD
\$250 TO 499.99	9/1/13 TO PRESENT	15AFAL1C		LG+50 LG+100 LG OTHER	LG LG+50 LG+100 OTHER	NPBS	window OE w/ special offer teaser; \$100+ form w/ special offer blurb in RD
\$100 TO 249.99	9/1/13 TO PRESENT	15AFAL1D		LG+50 LG+100 LG OTHER	LG LG+50 LG+100 OTHER	NPBS	window OE w/ special offer teaser; \$100+ form w/ special offer blurb in RD
\$50 TO 99.99	9/1/13 TO PRESENT	15AFAL1E		LG+25 LG+50 LG OTHER	LG LG+25 LG+50 OTHER	NPBS	window OE no special offer teaser; UNDER \$100 form no special offer in RD
\$25 TO 49.99	9/1/13 TO PRESENT	15AFAL1F		LG+10 LG+15 LG OTHER	LG LG+10 LG+15 OTHER	NPBS	window OE no special offer teaser; UNDER \$100 form no special offer in RD
\$10 TO \$24.99	9/1/13 TO PRESENT	15AFAL1G		LG+5 LG+10 LG OTHER	LG LG+5 LG+10 OTHER	NPBS	window OE no special offer teaser; UNDER \$100 form no special offer in RD
\$5 TO \$9.99	9/1/13 TO PRESENT	15AFAL1H		\$10 \$15 \$20 OTHER	\$10, \$15, \$20 OTHER	NPBS	window OE no special offer teaser; UNDER \$100 form no special offer in RD
	Subtotal actives		0				
Inactive (13-24 months)							
\$1000 AND OVER	9/1/12 TO 8/31/13	15AFAL2A		\$ ____	default ask out	NPBS	window OE w/ special offer teaser; \$100+ form w/ special offer blurb in RD
\$500 TO \$999.99	9/1/12 TO 8/31/13	15AFAL2B		LG+100 LG+150 LG OTHER	LG LG+100 LG+150	NPBS	window OE w/ special offer teaser; \$100+ form w/ special offer blurb in RD
\$250 TO 499.99	9/1/12 TO 8/31/13	15AFAL2C		LG+50 LG+100 LG OTHER	LG LG+50 LG+100 OTHER	NPBS	window OE w/ special offer teaser; \$100+ form w/ special offer blurb in RD
\$100 TO 249.99	9/1/12 TO 8/31/13	15AFAL2D		LG+50 LG+100 LG OTHER	LG LG+50 LG+100 OTHER	NPBS	window OE w/ special offer teaser; \$100+ form w/ special offer blurb in RD
\$50 TO 99.99	9/1/12 TO 8/31/13	15AFAL2E		LG+25 LG+50 LG OTHER	LG LG+25 LG+50 OTHER	NPBS	window OE no special offer teaser; UNDER \$100 form no special offer in RD
\$25 TO 49.99	9/1/12 TO 8/31/13	15AFAL2F		LG+10 LG+15 LG OTHER	LG LG+10 LG+15 OTHER	NPBS	window OE no special offer teaser; UNDER \$100 form no special offer in RD
\$10 TO \$24.99	9/1/12 TO 8/31/13	15AFAL2G		LG+5 LG+10 LG OTHER	LG LG+5 LG+10 OTHER	NPBS	window OE no special offer teaser; UNDER \$100 form no special offer in RD
\$5 TO \$9.99	9/1/12 TO 8/31/13	15AFAL2H		\$10 \$15 \$20 OTHER	\$10, \$15, \$20 OTHER	NPBS	window OE no special offer teaser; UNDER \$100 form no special offer in RD
	Subtotal inactives		0				

What are gift strings

1. Gift strings are designed to move renewing donors up to the next ROUND number level
2. \$25, \$50, \$100, \$150, \$200, \$250, \$500, \$1,000, \$1,500, \$2,000, etc.

Gift String Basics

1. Small changes in your gift strings can yield big results
2. Gift string, ask string, ask array, etc. = suggested donation amounts on donation response form
3. Keep numbers round
4. Reply and letter match

Basic Gift String Formulas

1. One of two formulas often used:
 - Percentage of Prior Year Gift
 - 1 x, 1.25x, 1.5x or 2x the prior year's donation.
 - \$50 gift = \$50, \$75, or \$100
 - Fixed amount increase
 - Gift+10, Gift+20 or Gift +30, etc.
 - \$50 gift = \$50, \$60, \$70 or \$80
 - Giving history and database critical

Other gift string strategies

1. Ask for less... response increase and overall revenue increase
2. Ask for more, a lot more...
3. Ask for nothing at all...

Other gift string strategies

4. Prime the ask by using higher to lower gift string request
 - \$100, \$50, and \$25 vs. \$25, \$50, and \$100

Yes, Donna, I want to continue my support!

My previous support was \$25 in April of 2012.

Enclosed is my contribution of:

\$100 \$50 \$25 Other \$_____

Other gift string strategies

5. People tend to pick the middle likely choice – make ask #2 the target
6. Use affirming language
7. Remind donors of their last gift amount and date.

Putting it together...

1. Major donors have the biggest influence on your fundraising campaign results
2. Maximize the results
3. Gift strings promote renewal and upgrades
4. Customize gift string based on previous giving or possible capacity

Our chart

Gift Range Chart

Goal Amount:

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2,800.00	3	12	8,400.00	46,400.00	46%
2,300.00	5	20	11,500.00	57,900.00	58%
2,000.00	7	28	14,000.00	71,900.00	72%
1,500.00	7	28	10,500.00	82,400.00	82%
1,000.00	10	40	10,000.00	92,400.00	92%
Under 1,000.00	15	60	7,600.00	100,000.00	100%
Totals	54	216		100,000.00	

Perfect harmony defined!

1. Identify number of gifts/donors needed at a particular level
2. Use strategies to upgrade donors
3. Possible upgrade segments of donors
 - Donor gave \$1,200 (target is \$1.5K) possible gift string is \$2,000, **\$1,500**, \$1,200
 - Donor gave \$2,000 (target is \$2.5K) possible gift string is \$5,000, **\$2,500**, \$2,000
 - Donor gave \$2,500 (target is \$5K) possible gift string is \$10,000, **\$5,000**, or \$2,500

A few more tips!

1. Keep renewal string “ask logic” consistent.
2. You may want to segment out major donors and put in a personalized ask for each specific donor
3. Round amounts to the nearest \$0 or \$5
4. Different donor frequency level i.e. Active (0-12 months), Inactive donors (13-24 months), and Lapsed (25-36 months)

Key concepts in review

1. How to develop a gift range chart.
2. Learn how to use the gift range chart to monitor and report on your campaign
3. What is a gift string
4. How to create a custom gift string
5. How the gift string and gift chart work together

Take it back...

The top three ideas, concepts, or thoughts inspired during this training that you will take back to your office and implement immediately.

Questions and Answers

At this time, your questions are welcome!

Contact me

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