



VERITUS
GROUP

Building Authentic Donor Relationships

Getting to 7 Figures: How One Transformational Gift Can Inspire More



VERITUS GROUP

Jeff Schreifels

- Principal & Owner
 - Expert in developing, planning and executing strategic fundraising and marketing programs
 - Over 30 years of experience building major gifts and mid-level fundraising programs
 - Jeff and his son Jake have seen almost every MLB stadium together
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Diana Frazier

- Senior Client Experience Leader
 - Mid-Level and Major Gift program developer and coach
 - 32 years in non-profit fundraising, including broadcast media, higher education, international development
 - Reader, Runner (including Philadelphia's iconic Broad Street Run), Gatherer of friends and family
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Our vision is to help non-profits create a culture and approach to fundraising that creates transformational relationships with your donors.





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Our Strategy and Approach

We accomplish this vision by helping non-profits create a system, structure, and strategy that will:

- Create alignment and buy-in across your organization
- Reduce donor and value attrition
- Improve revenue per donor
- Support increased net revenue for programs
- Create deeper, more meaningful relationships with your donors



Who We've Partnered With



Let me tell you a story
about a relationship that resulted
in a \$4.7 million gift...



What's Keeping Your
Organization from a \$4.7
Million Gift?



What is the Problem?



What is...

Donor Attrition?

Donor Value Attrition?



Measuring Value Attrition

Donor	Total Giving Year 1	Total Giving Year 2	Total Giving Year 3	YTD Giving Year 4	Total Lifetime	Notes
1	\$10,000	\$16,000	\$7,600		\$180,000	Down
2	\$10,000	\$8,100	\$24,000		\$231,785	
3	\$10,000				\$91,256	Missing
4	\$10,000	\$12,000	\$1,400	\$4,100	\$363,000	Back up
5	\$10,000	\$1,000	\$1,000	\$3,500	\$125,000	Back up
6	\$10,000				\$97,000	Missing
7	\$10,000				\$10,000	Missing
8	\$10,000	\$12,000	\$110,000	\$2,000	\$210,000	
9	\$10,000	\$9,500	\$13,600		\$136,485	Watch
10	\$10,000	\$42,000	\$17,000		\$155,000	Down
11	\$10,000	\$50,000	\$50,000		\$118,200	Upgrade?

What do these same donors do year over year?



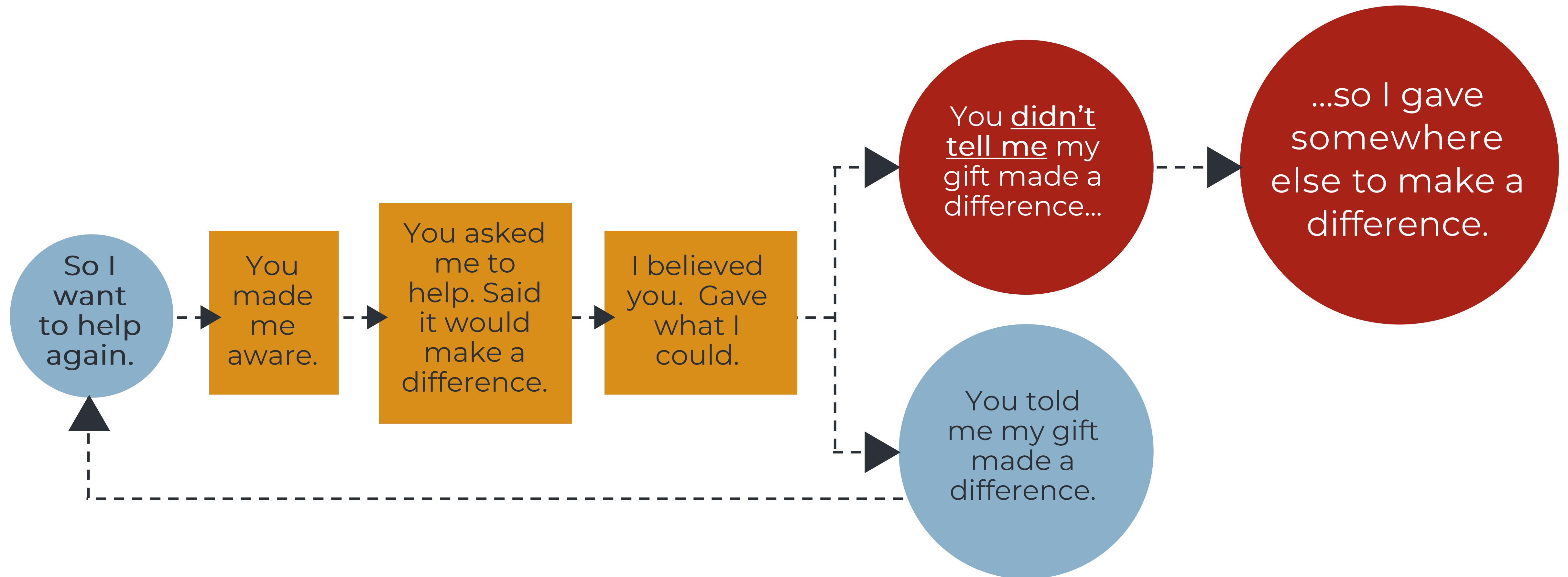
New Money Covers Losses

		Year 1	Year 2	Variance	Percentage Change
View 1	Income from all donors giving \$1,000+ cume	\$2,560,000	\$3,100,000	\$540,000	21.09%
View 2	Income from the donors who gave \$1,000+ cume in Year 1	\$2,560,000	\$1,305,600	\$(1,254,400)	-49.00%
	Income from donors giving \$1000+ cume for the first time		\$1,794,400	\$1,794,400	100%
		\$2,560,000	\$3,100,000	\$540,000	21.09%

A serious problem covered up by “new money” ...



Very simply put...This is how
we lose our donors.





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Caseload donors are unqualified, so you are wasting time trying to get ahold of donors who are not interested.





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No Clear Plan or Goal

- No individualized communication plans – incorporating passions, interests, and communication preferences
- No individualized goals
- Caseload is not tiered






How Are You Measuring Up?



Know how you are progressing each month to goal and how to make up the difference before year ends.

A woman with blonde hair and glasses is speaking in a meeting. She is wearing a light blue blazer and has her hands raised in a gesture. In the background, another woman is visible, looking towards the speaker. The scene is set around a wooden table with a smartphone, a notebook, and a coffee cup. The entire image has a warm, orange-toned overlay.

A System for Transformational Giving



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Relationship-Focused

- Identifying if you are actually being relationship-focused:
 - The right systems and structures
 - Reporting back
 - ATM or Partner?
-

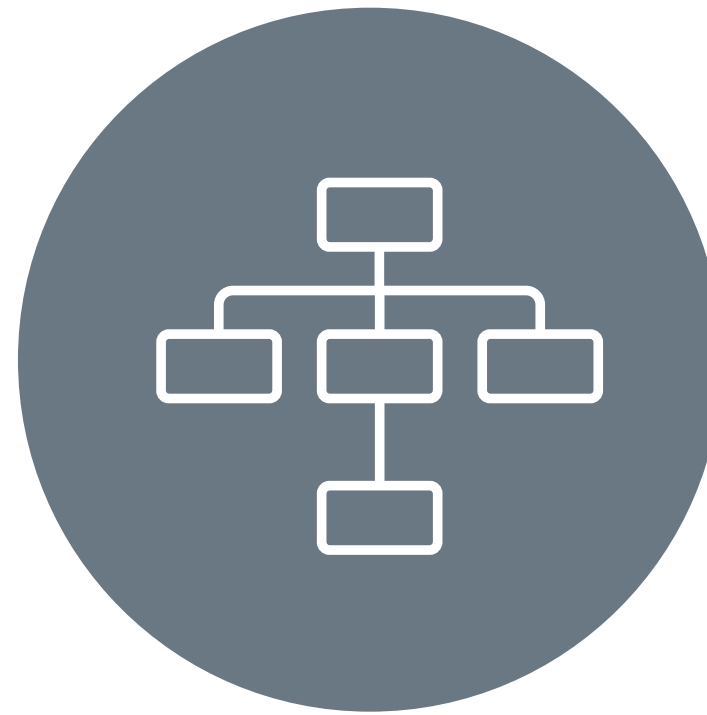




The Structure of Major Gifts Programs



Dedicated Major
Gifts Officer.



Tiered caseload of
150 qualified
donors.

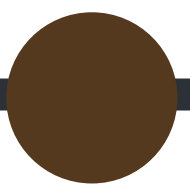
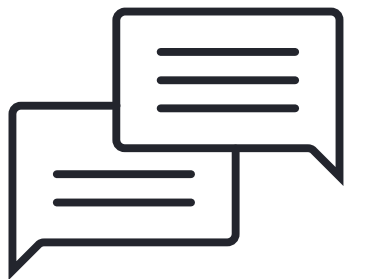
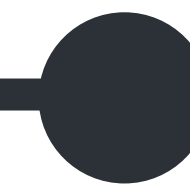
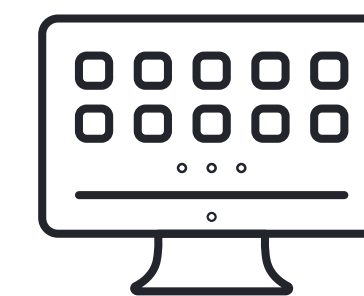
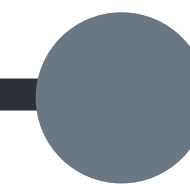
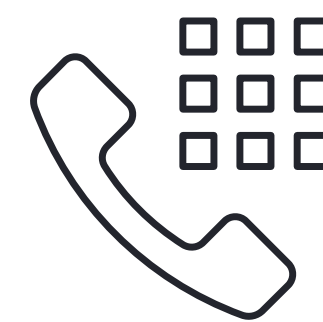
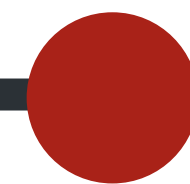
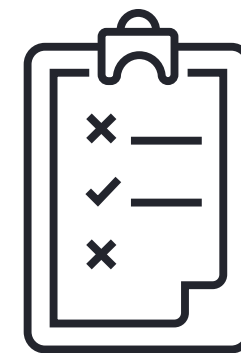
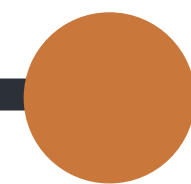
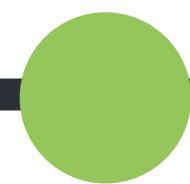
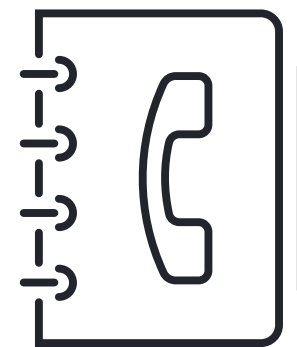
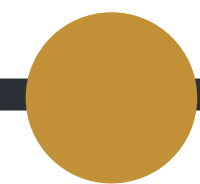


Strategic 12-month
communication
plan and revenue
goal associated with
every donor on the
caseload.



Donor Qualification Cycle

It can take an average of **seven touch points** before a donor may respond to you.



General
Introduction
Letter

Follow-Up
Attempts
(Phone
Call/Email)

Touch
Point with
Personal
Note

Non-
Responder
Letter
& Survey

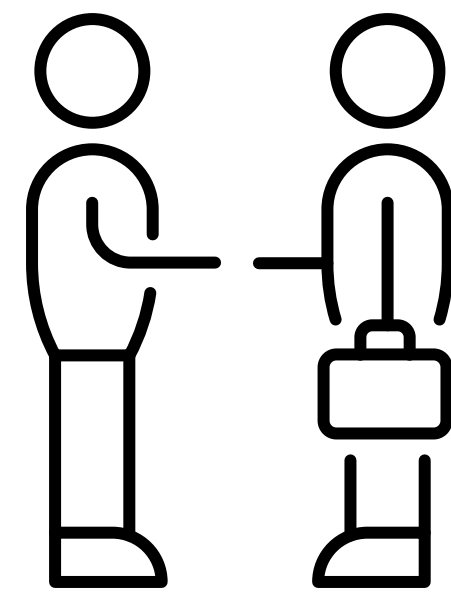
Follow-Up
Attempts
(Phone
Call/Email)

Touch Point

Final Note



Setting Expectations



1 in 3

will say YES



2 in 3

will not respond
or will eventually
say NO



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Tiering Your Donors

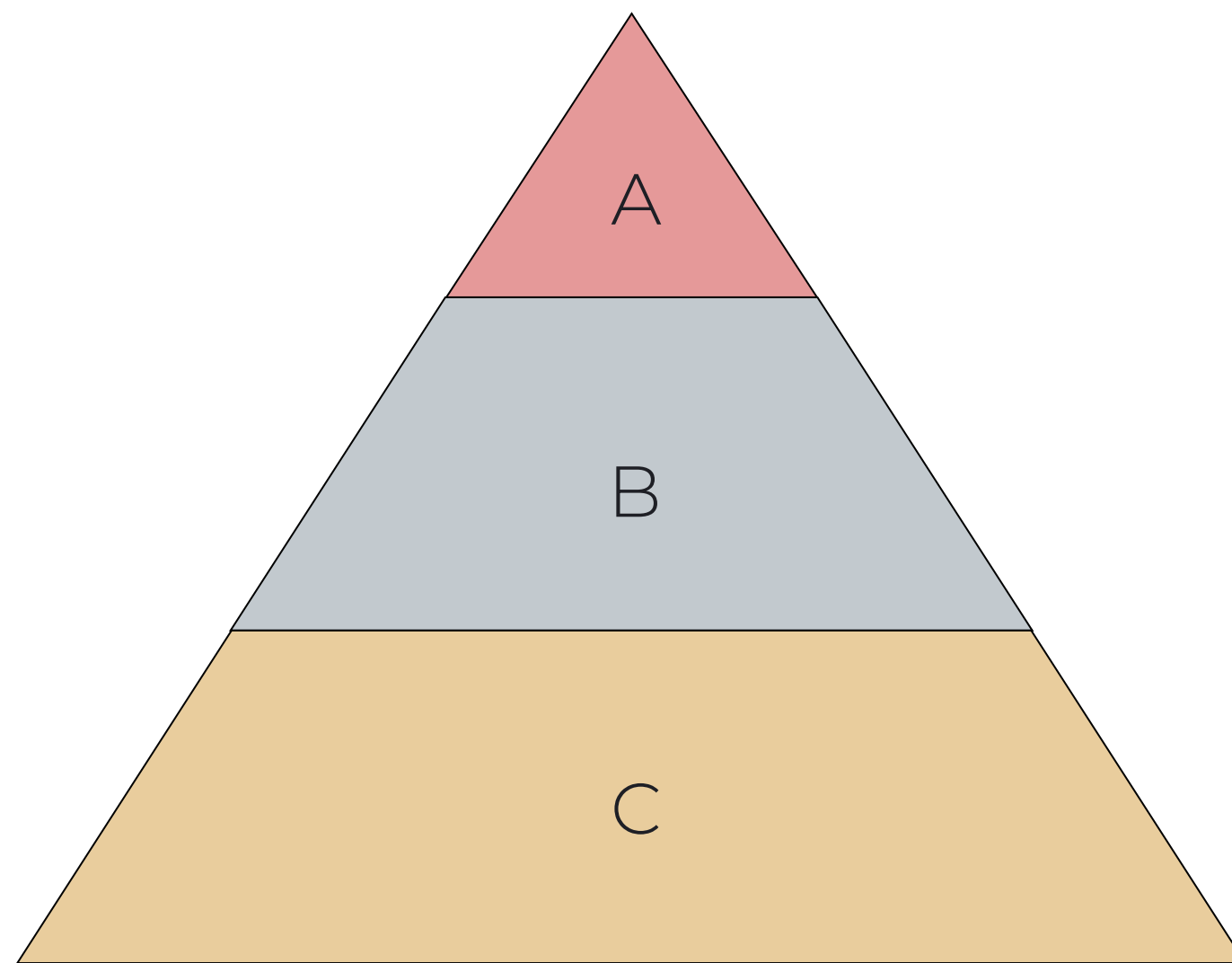
- Initial tiering is based on capacity and inclination
 - Tier A – fewest donors, highest personalization and time spend
 - Tiers are fluid and should be adjusted as you learn more about donors
-





Tiering Your Donors

Caseload Mix



LEVEL OF DONORS	Count	% Effort	Strategy/Messaging		Outcomes
A	10	50%	Very Personal	Strategic Moves	<ul style="list-style-type: none">• 6 and 7 Figure Gifts• Retention• Repeat Giving
B	40	30%			<ul style="list-style-type: none">• Major Upgrading• Retention• Repeat Giving
C	100	20%	Less Personal	Tactical Moves	<ul style="list-style-type: none">• Smaller Upgrading• Retention• Repeat Giving

Top Tier High Capacity Donors Medium Capacity Donors Average Capacity Donors



Setting Individual Goals

Donor Name	Year Before	Last Year	Goal	Variance	%	Comments
A. Smith	\$5,000	\$6,000	\$7,500	\$1,500	25.00%	
B. Jackson	\$5,000	\$6,000	\$5,000	(\$1,000)	-16.67%	Donor Biz Hurting
C. Garcia	\$2,500	\$8,500	\$10,000	\$1,500	17.65%	
D. Williams	\$7,800	\$21,000	\$10,000	(\$11,000)	-52.38%	OT Special Gift Last Year
E. Kim	\$10,000	\$12,000	\$15,000	\$3,000	25.00%	
Totals	\$30,300	\$53,500	\$47,500	(\$6,000)	-11%	
Reframed Total	\$30,300	\$41,000	\$47,500	\$6,500	16%	Adjusted for \$12.5K Extra from D. Williams Last Year



A Plan for Every Donor

Chris Lee

GOAL: \$500,000 Interest/Passion: Disaster Services Comm Preference: Email

Betty Richards

GOAL: \$250,000 Interest/Passion: Single Mothers Comm Preference: Personal Visits

Chris
Lee

JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEPT	OCT	NOV	DEC
YMAD touch	Email Internal Memo	Invite to EDS Briefing	YMAD+ person helped letter	Birthday Card	Visit program site – opp briefing	YMAD plus ASK	YMAD touch and thanks	Ride along in EDS vehicle for demo	YMAD with possible special ASK	Invite to Board Luncheon	YMAD – Book on the Poor

Betty
Richards

JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEPT	OCT	NOV	DEC
YMAD touch – lunch at Applebees	Tour House of Hope – meet Sally/Kid	Internal doc on expansion plans + YMAD	Invite to architect briefing + dinner	Visit in home present final plan and ASK	Thanks and YMAD	Invite to “Founders luncheon”	Research on plight of single moms	Birthday card and YMAD	Ground breaking ceremony, visit with new mom	YMAD with possible special ASK	YMAD and gift of H of H child drawing



Developing Touch Points

Types

- Problem or Gap
- Ask
- Thanks
- YMAD
- Personal Connections

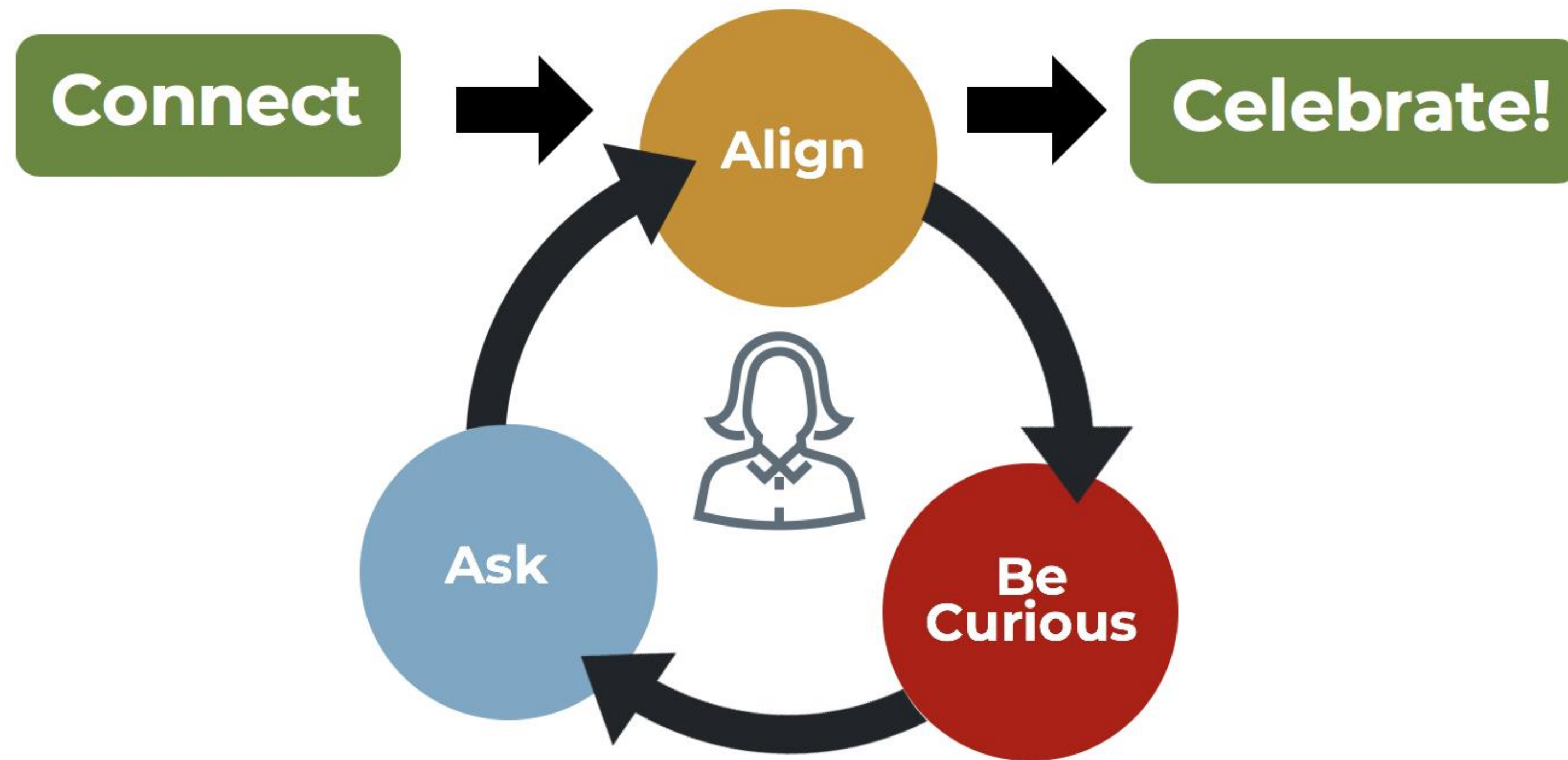
You Made a Difference

- Impact Reports
- Project Reports
- Transformation Stories
- Insider Memo
- Subject Matter Expert/
External Validation
- Anecdotal Information or Reports



Using Permission-Based Asking with Donors

Permission-Based Asking™ Model





What Are Your Goals?

The objectives of a major gifts program include:



Learning the
passions and
interests of your
donors

Increasing net
revenue from
major donors
through more
meaningful
interactions

Identifying
donors who have
the capacity and
inclination to
make a
transformational
gift

Building a
relationship of
trust and
connection with
your donors

A woman with long brown hair, wearing a yellow cardigan over a striped shirt, is pointing with a red marker at a whiteboard. The whiteboard is covered with numerous colorful sticky notes in shades of yellow, orange, pink, and green. In the background, a man with a beard and dark hair, wearing a light blue shirt, is looking on. The scene is set in a brightly lit office or meeting room with a warm, golden light. The text "Measuring What Matters" is overlaid in the center in a large, white, sans-serif font.

Measuring What Matters



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Metrics

- Caseload Size: 150
- Tiering your donors: A, B, C
- Personalization
- Tracking meaningful connections
- Recording in database
- System for long-term tracking





Key Performance Metrics and Reports

What Do We Measure?

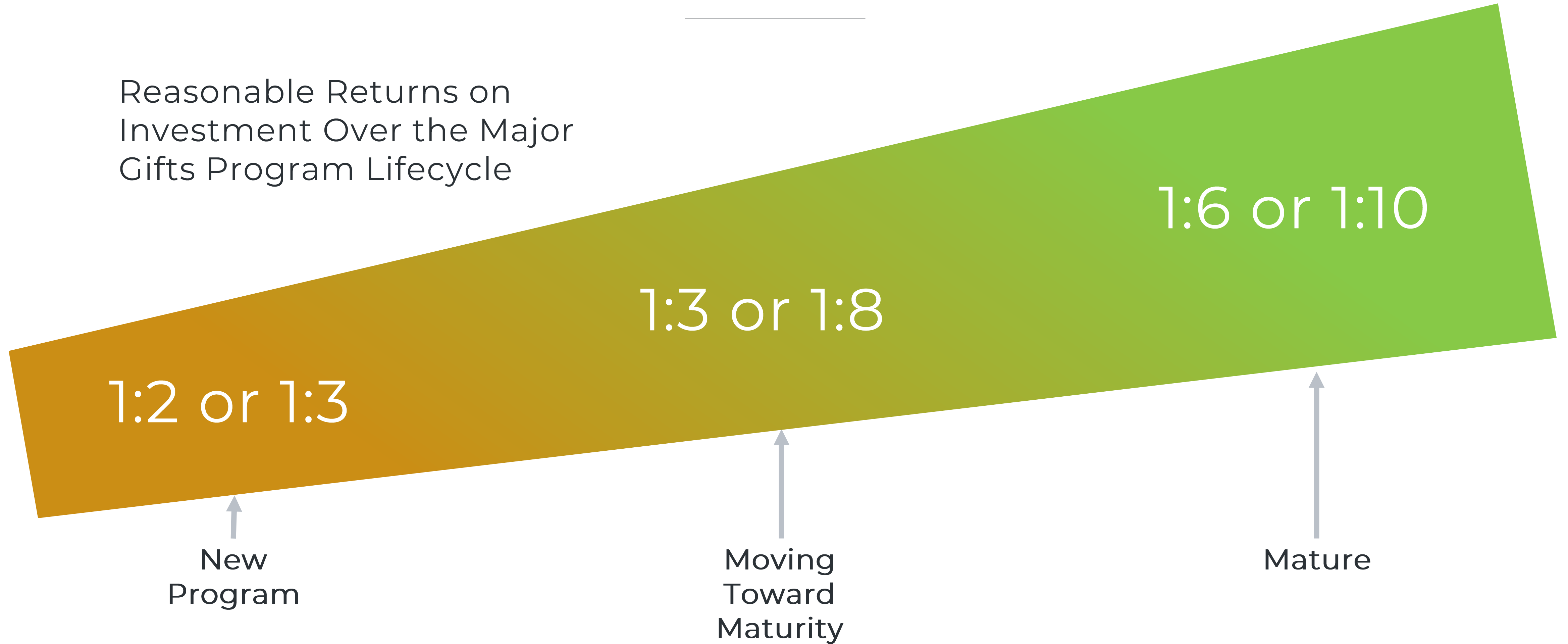
Current Metrics	Veritus Metrics
Total Dollars Raised	Total Dollars Raised
# of Face to Face Visits	# of Meaningful Connections
# of Asks	# of Stewardship Calls
# of Gifts Closed	# of Asks
# of Stewardship Calls	Working the Plan for Each Caseload Donor
# of Prospects Identified	
# of Discovery Calls Made	How Did Each Donor Perform Year to Year?
# of Cold Calls Made	
# of Moves	





Major Gifts Return on Investment

Reasonable Returns on Investment Over the Major Gifts Program Lifecycle

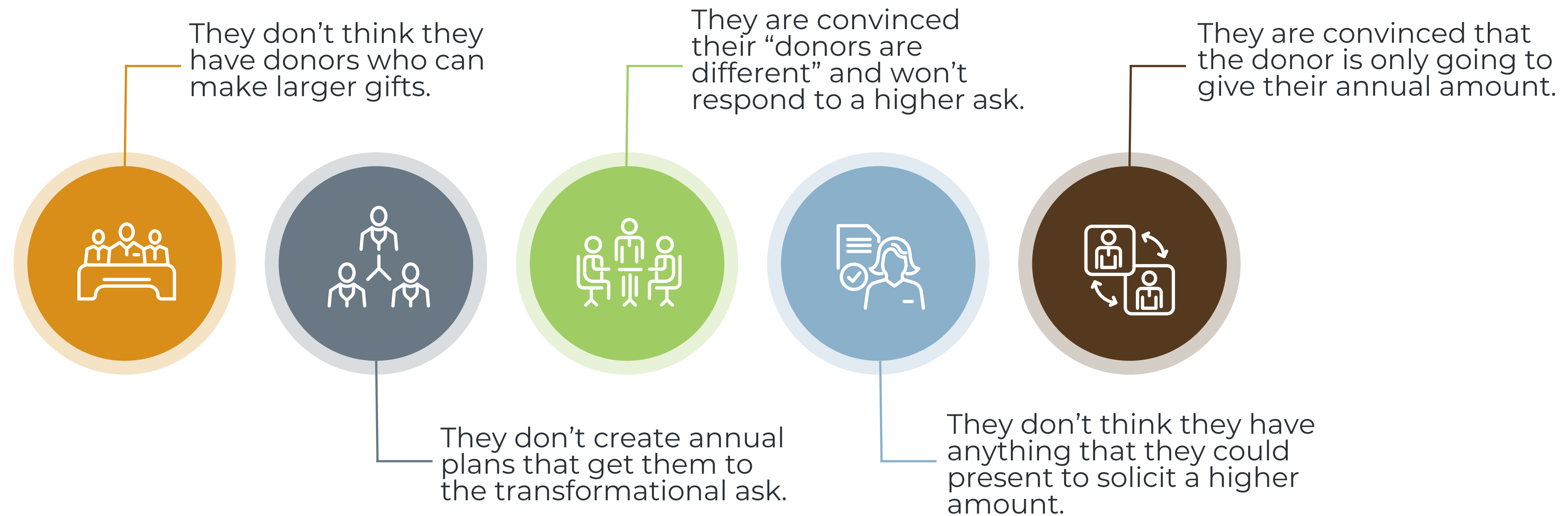


Finding The “Few”

A woman with short, wavy blonde hair and black-rimmed glasses is seated at a wooden table, gesturing with both hands as if speaking. She is wearing a light blue button-down shirt. In the background, another woman with long dark hair is seated, looking towards the speaker. On the table in the foreground, there is a black smartphone and a brown paper coffee cup with a white lid. The scene is set in a bright, indoor environment with a large green plant visible in the background.



What Fundraisers Get Wrong





Transformational Giving



Requires a strong relationship with the donor.



Requires a history of trust between the donor and the organization.



Requires evidence from the organization that they have a realistic plan to use that gift effectively to make an impact.



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You Must Have Donor Offers

- Program packaging should include program cost and a percentage of overhead.
 - Offers should be specific to the donor's passions and interests.
 - Offers should have a compelling and persuasive story that has a believable solution with a specific amount.
-

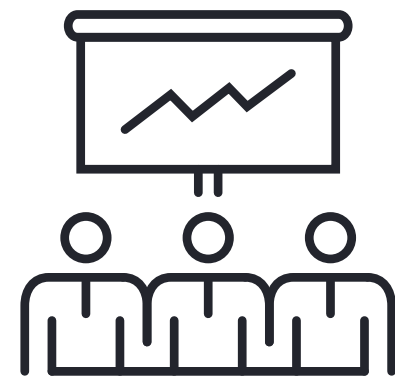




How to Plan for Transformational Donors



Look for donors that currently give 2 to 3 times more than the average major gift in your file.



Create a 24-36-strategic month plan.



Continue to solicit for ongoing gifts.



Show the impact of your donors' current and past gifts.



Engage the donor beyond giving money.



Be prepared with a transformational gift plan.



Building the Elements

JAN Planned Touch	FEB Planned Touch	MAR Planned Touch	APR Planned Touch	MAY Planned Touch	JUN Planned Touch
	Met at athletic event	Follow up coffee meeting to learn interest	Show plans for renovating Field House and other Track & Field needs	Ask to fund \$300k Field House renovations	Agreed to \$300k over 3 Years for Field House renovations
JUL Planned Touch	AUG Planned Touch	SEP Planned Touch	OCT Planned Touch	NOV Planned Touch	DEC Planned Touch
Phone call check in - he is going to British Columbia for 6 weeks but hopes to be back for homecoming	Left message about attending scholarship appreciation breakfast to cast vision for impact	Good talk but won't be able to attend homecoming due to health	Unable to attend Minot game in ND; funded team meals	On campus to see field house, took to breakfast.	Holiday card. LM 12/1
JAN Planned Touch	FEB Planned Touch	MAR Planned Touch	APR Planned Touch	MAY Planned Touch	JUN Planned Touch
Native American student and services update; happy birthday phone call	Connected, he is in AZ with grandson for some athletic games.	Meet in MSP while he is there for treatment	New scholarship pledge for Native American students in discussion: \$68k over 4 years	Agreed to \$68k; spoke to about new pledge form	
JUL Planned Touch	AUG Planned Touch	SEP Planned Touch	OCT Planned Touch	NOV Planned Touch	DEC Planned Touch
Phone Call/follow up on pledge	Football Preview	Letter thanking him for support	Field House Preview in person	Phone Call	Holiday Card
JAN Planned Touch	FEB Planned Touch	MAR Planned Touch	APR Planned Touch	MAY Planned Touch	JUN Planned Touch
Basketball game?	Hall of Fame Update; Named Training Facility unveiled at Hall of Fame event - students spoke to him personally after event to thank him	Told him about classmate setting up research fund to honor faculty member	Phone call - begin discussion on long-term impact through multi-million investment in research fund	Graduation Update; more information on research impact	Golf?

If we had a way to teach you how to
move into transformational relationships
with your donors, would you be
interested?



Veritus Group Academy



Courses Begin: August 26, 2024

Certification Courses

- ☐ Certification Course for Major Gift Fundraisers
- ☐ Certification Course for Managers and Executives

Learning Approach: Online course you can do anywhere anytime, 8 Modules, Videos Recordings, Audio Recordings, readings, resources Application Assignments, Live Calls, Integration Work

Opportunity: You and your leaders get on the same page, speak the same language, work with donors from the same philosophy and structure.

CFRE: Each course provides 36 Credit Hours

To Sign Up: Go to www.veritusgroup.com/training

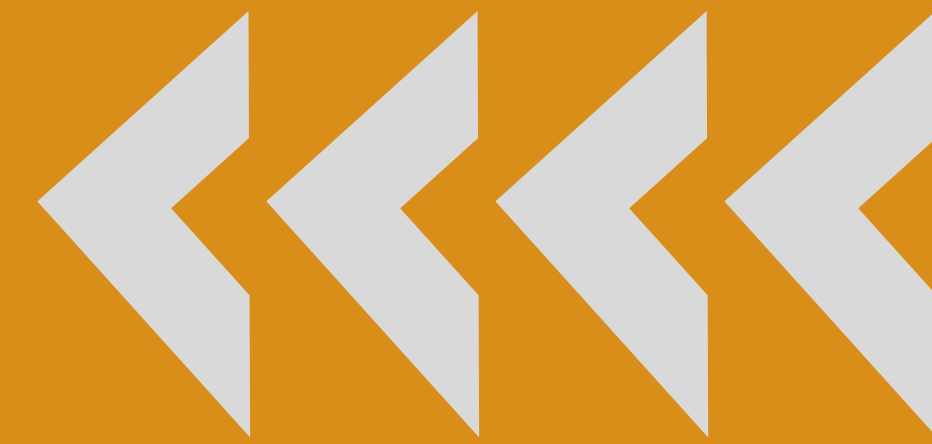
"Even a year after VGA training, even when things get nuts and other duties start to encroach, VGA has given me the skills to reassess, reprioritize and stay on track in managing my relationships with the organization's donors.

"At the end of the day, I'm reminded to go back to mission and review why we as an organization are here. Providing the donors with the opportunity to make a difference and seeing their steps to take action continually inspire me in this work."

Suzanne Barnes
Major Gifts and Corporate Relations
Truman State University

Get \$200 Off!

Scan the QR code and use
AUG24MG200 grab your spot in
our upcoming course session –
starting August 26th!



Thank you!

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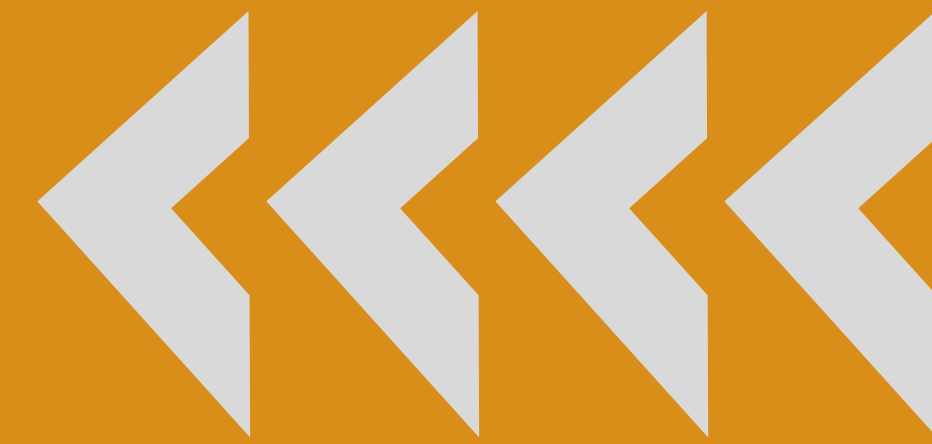
Let us help you create meaningful and
authentic relationships with your donors

A woman with long dark hair, wearing a blue and white striped button-down shirt, is standing and gesturing with her hands while speaking to a man. The man, seen from the back, is wearing a dark maroon shirt and has his hand near his chin in a listening pose. They are in an office with large windows in the background. The word "Questions?" is overlaid in white text across the center of the image.

Questions?

Get \$200 Off!

Scan the QR code and use
AUG24MG200 grab your spot in
our upcoming course session –
starting August 26th!



Thank you!

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Let us help you create meaningful and
authentic relationships with your donors



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