

The Right Gifts from the Right Person at the Right Time: Tracking Your Prospects

AFP Yosemite Valley Chapter

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Where We're Going

- Introductions
- Your Goals
- Why?
- What?
- Who?
- When?
- How?
- Q&A



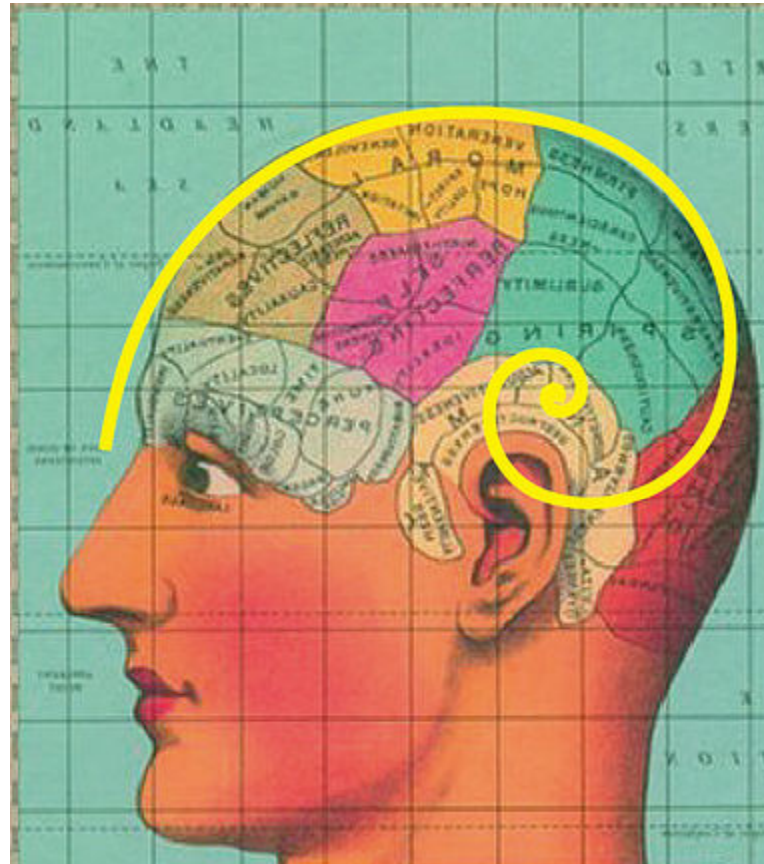
Your Goals



Why? Focus



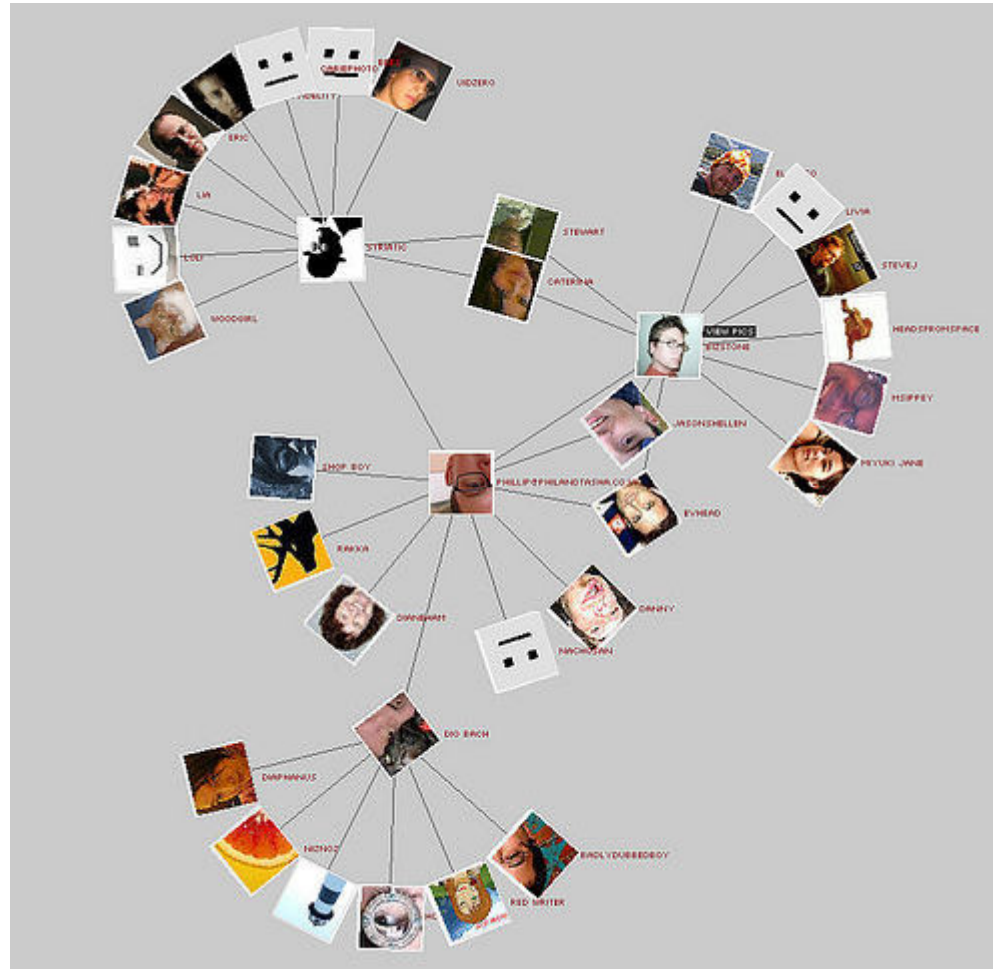
Why? Institutional Memory



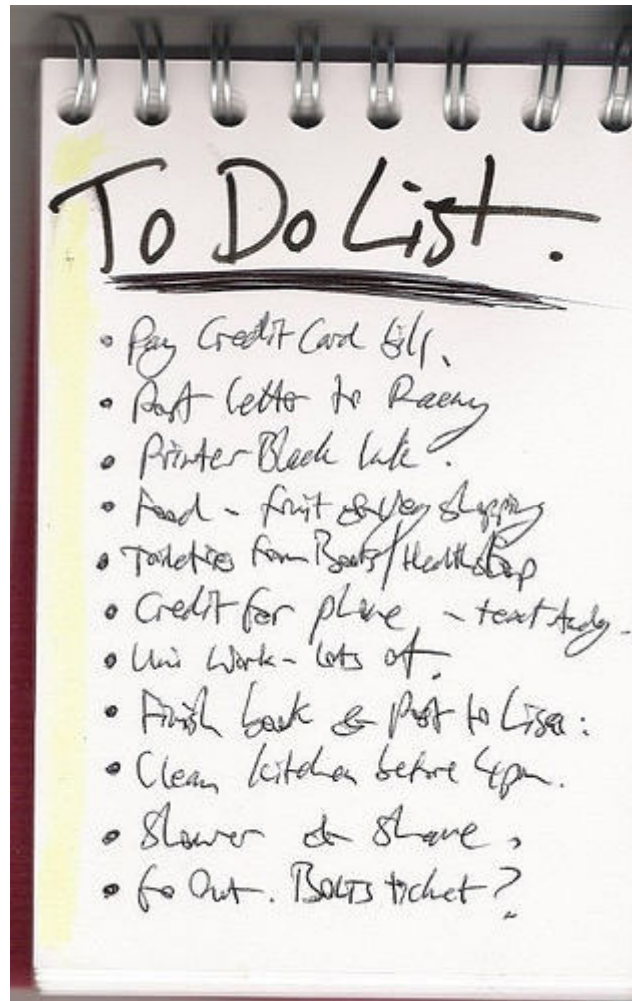
Why? Surviving Staff Turnover



Why? Understanding Connections



Why? Tracking Activities



Why? Prospecting



Why? Forecasting



What to track? Your constituents



What to track?

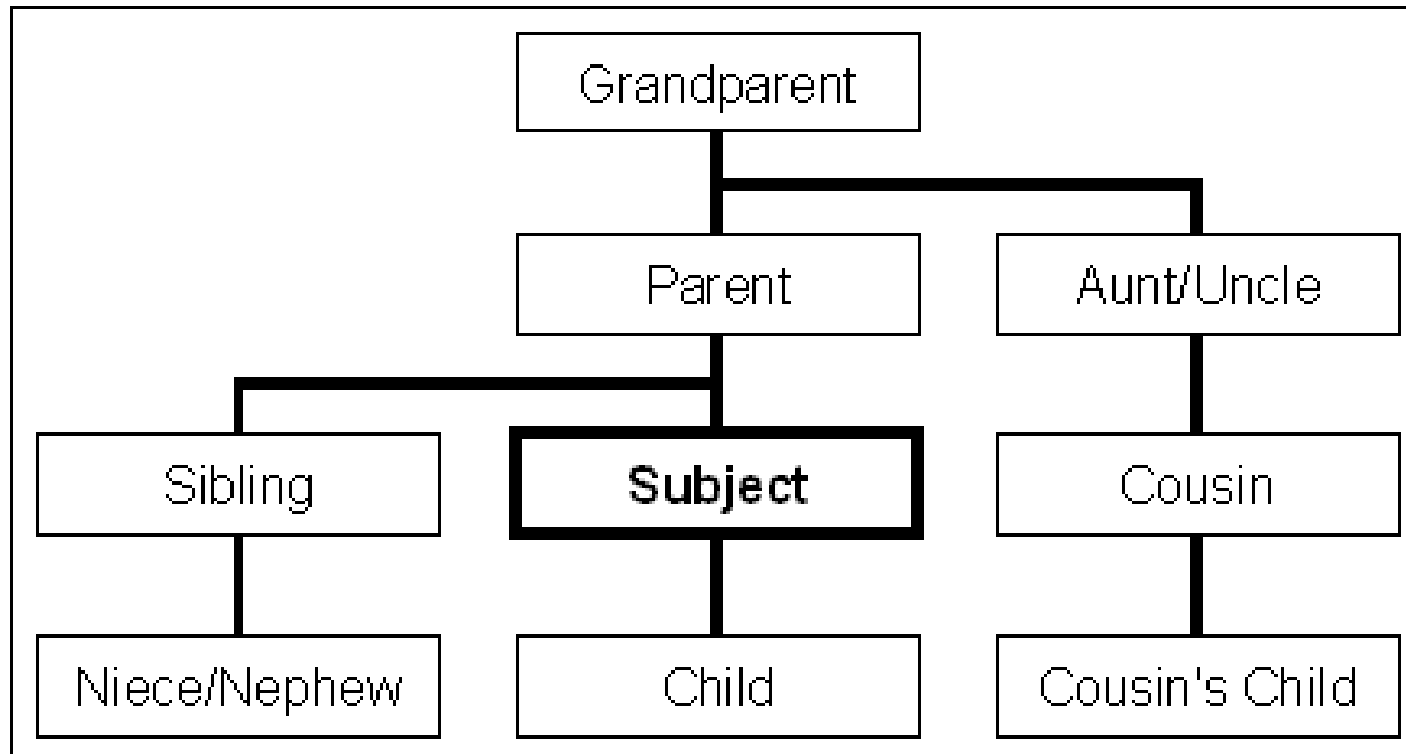
Who gave what, when, for what?



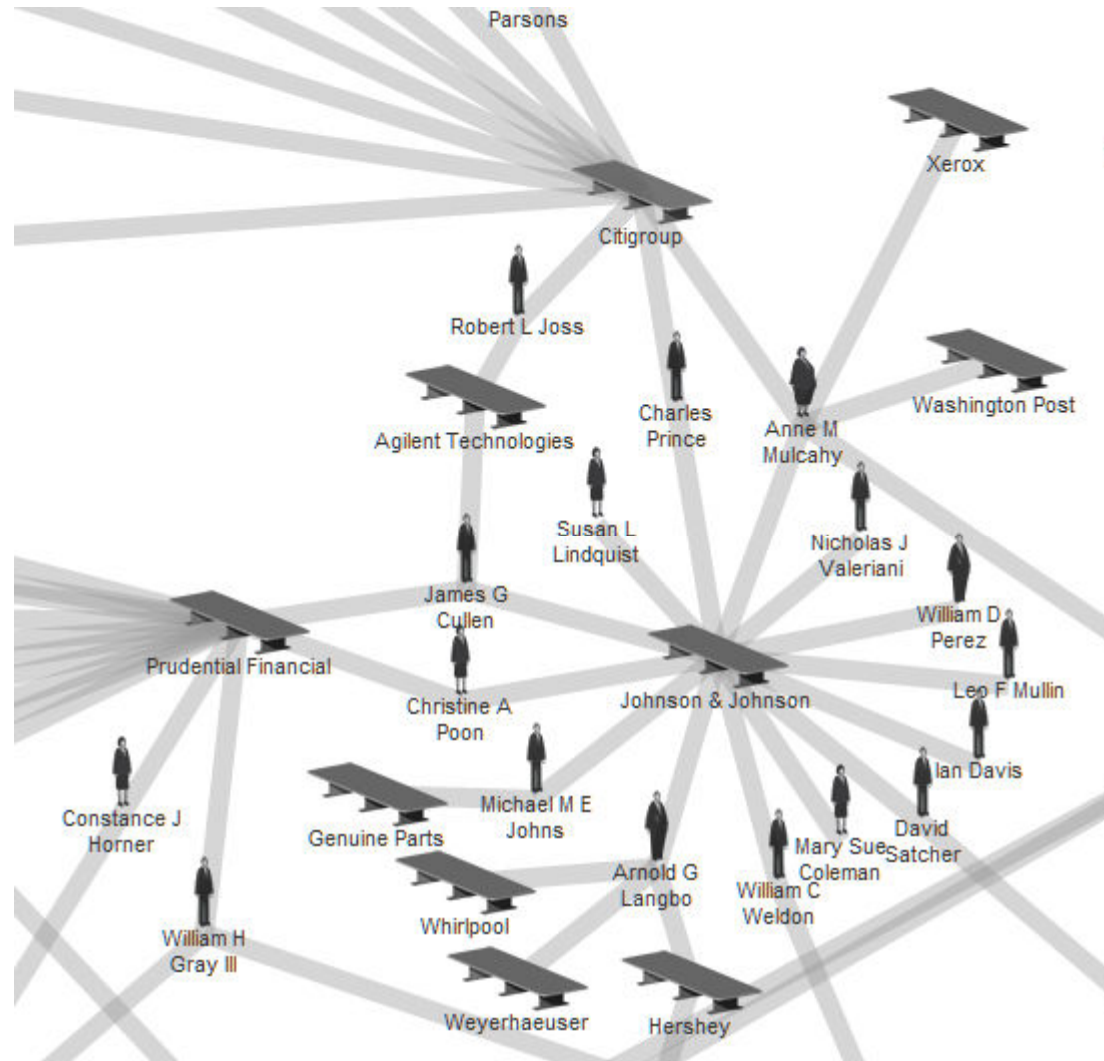
What to track? Relationships

Prospect	Manager	Solicitor	Volunteer
Rupert Giles	Buffy Summers	Alexander Harris	Willow Rosenberg

What to track? Relationships



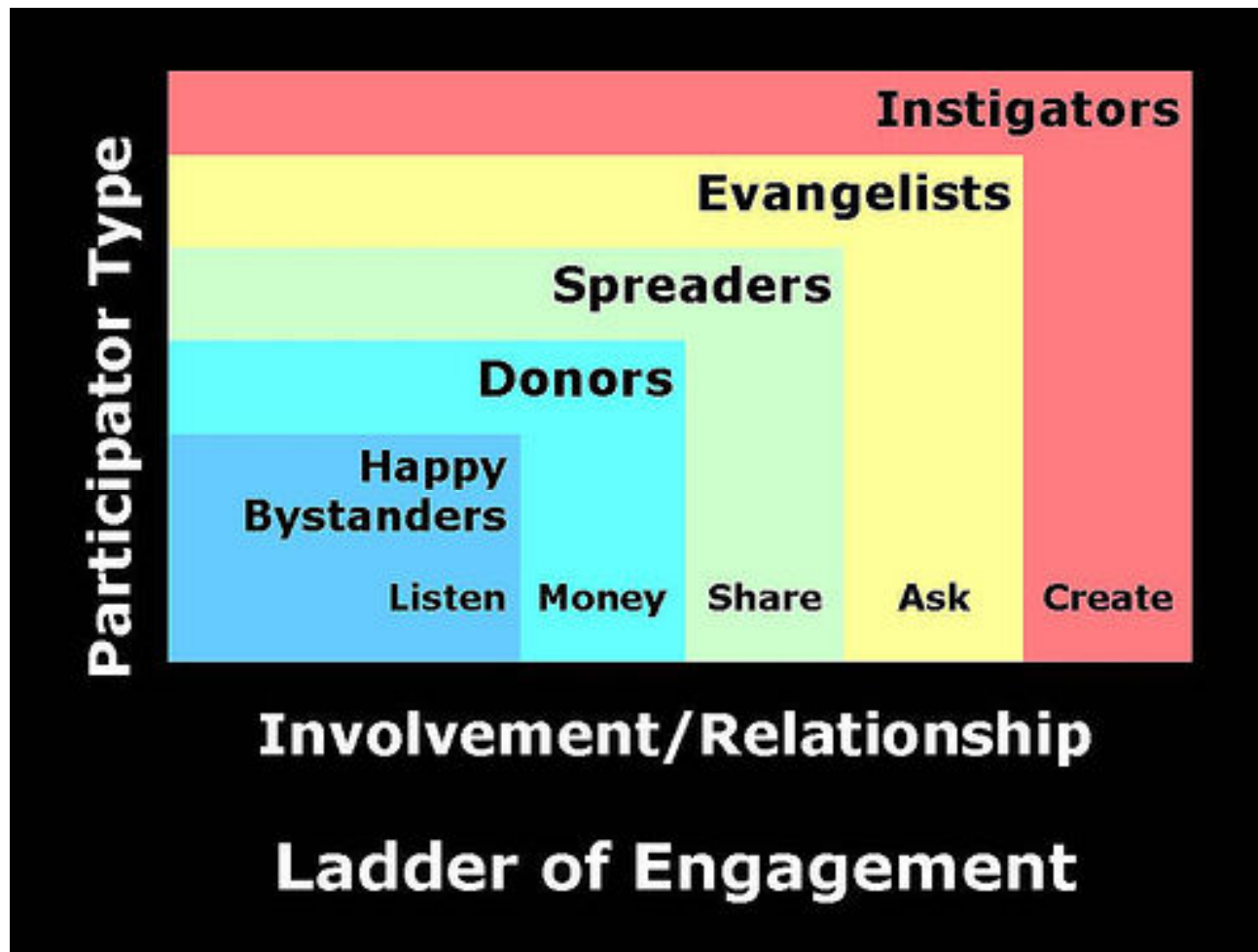
What to track? Relationships



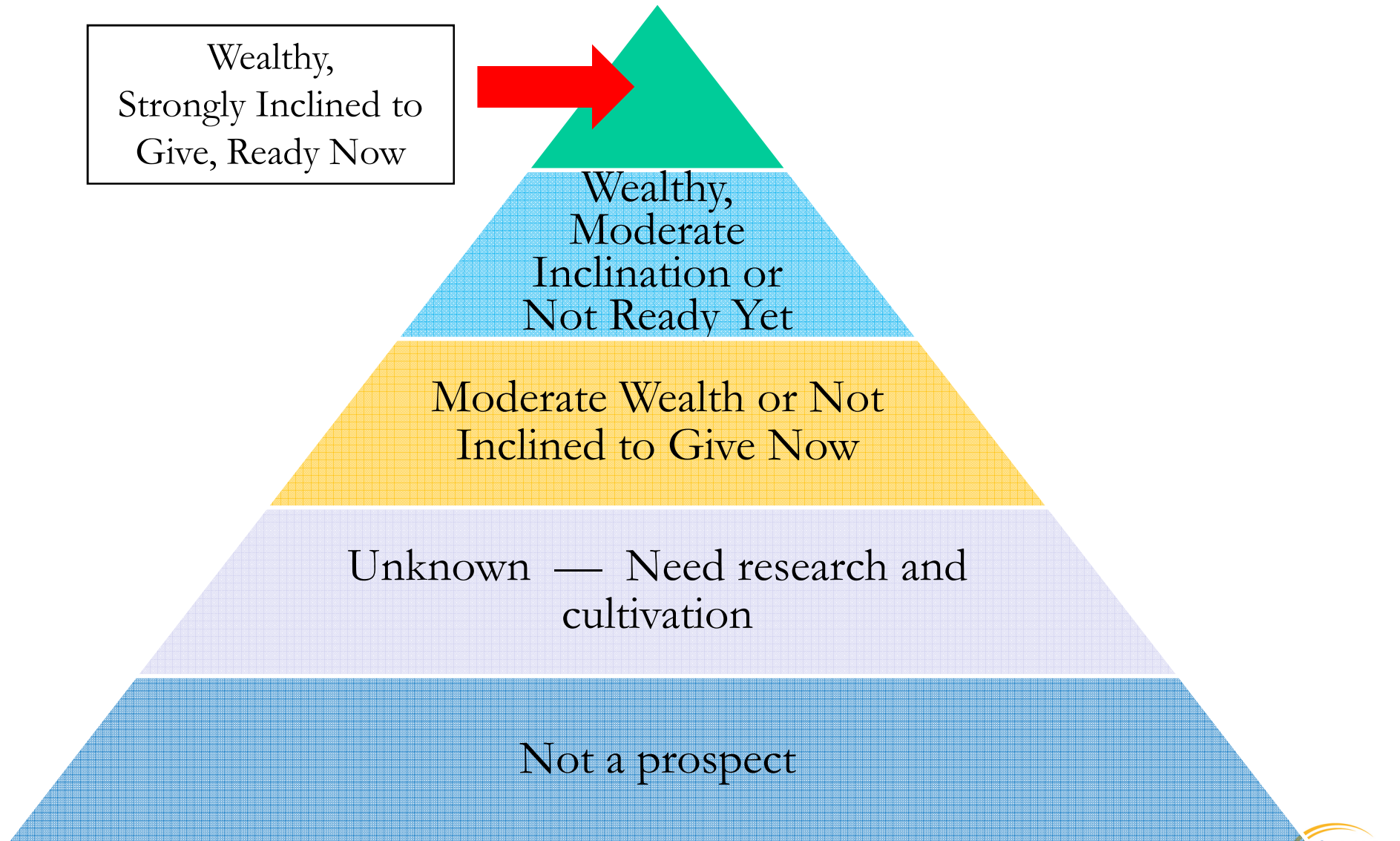
What to track? Interests

This is
interesting

What to track? Involvement, interactions



What to track? Top Prospects



What to track? Prospect Ratings

\$5M+

\$1M - \$4.9M

\$500,000 - \$999,999

\$250,000 - \$499,000

\$100,000 - \$249,000

\$50,000 - \$99,999

\$25,000 - \$49,000

\$10,000 – \$24,000

\$10,000 or less (not a major gift prospect)

What to track? Prospect Stages

- Identification
- Research
- Qualification
- Cultivation
- Solicitation
- Stewardship/Renewal
- Not a prospect

What to track? Who's Got the Ball?



What to track?

Last action, next steps



What to track? Notes



What to track? The moon



Who should track? Everyone



When to track? All the time

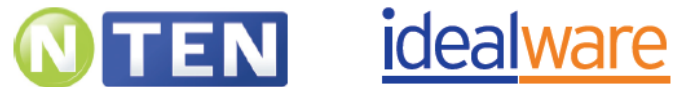


How to track?

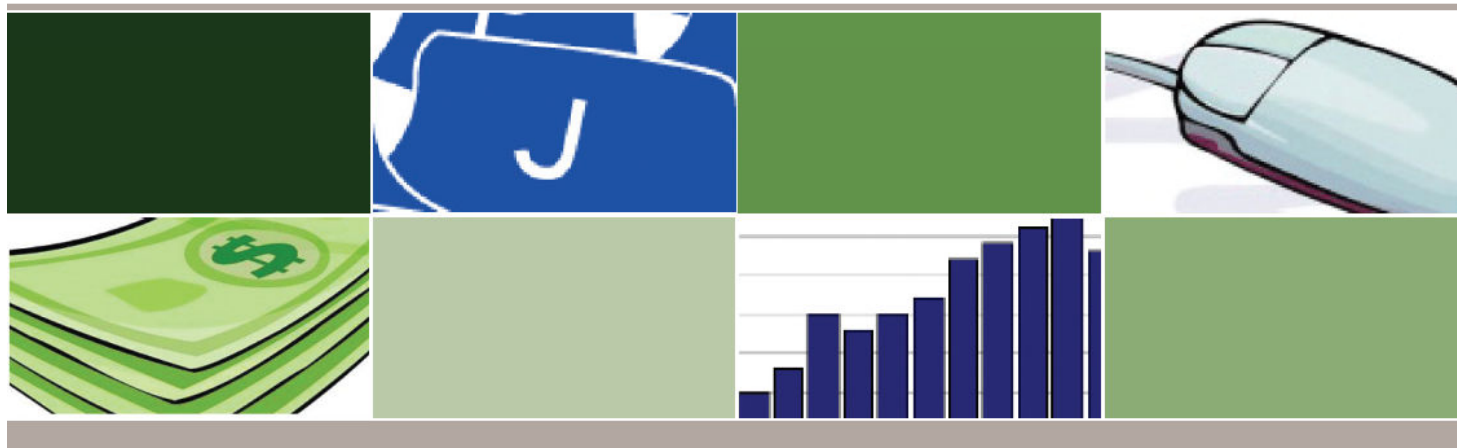


How to track?

Use a database that supports major gifts



A CONSUMERS GUIDE TO LOW COST DONOR MANAGEMENT SYSTEMS



June 2011

Idealware's "[Consumers Guide to Low Cost Donor Management Systems](#)"

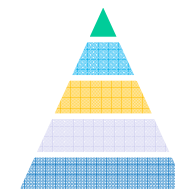
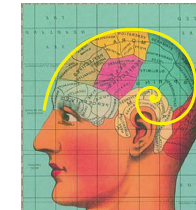
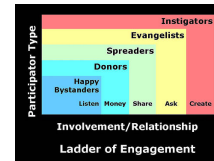
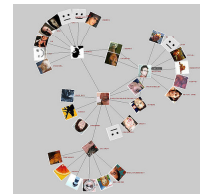
How to track?

Someone needs to be in charge



Recap: What to track and why

- Focus
- Institutional memory
- Forecasting
- Giving history
- Relationships
- Notes
- Involvement
- Top prospects
- Who's got the ball
- Next steps



So why are we doing this?

- Tracking doesn't raise the money. But tracking can assist with:
 - Prospect management and tracking.
 - Stewarding your current donors.
 - Identifying future donors.
 - Time-management.
 - Managing staff.
 - Measuring and forecasting.
 - Asking the right person for the right gift at the right time for the right purpose.
- This is only possible if data is captured and made available to appropriate staff.

Resources

Carter McNamara: *Tips for Implementing a Major Gifts Program*

<http://www.nonprofitlawblog.com/home/2010/11/major-gifts-part-i-tips-for-implementing-a-major-gifts-program.html>

Tony Poderis: *Managing & Reporting Fund-Raising Campaign Progress*

<http://www.raise-funds.com/2011/managing-reporting-fund-raising-campaign-progress/>

Tony Poderis: *Rating and Evaluating Prospects*

<http://www.raise-funds.com/1998/rating-and-evaluating-prospects-whom-do-you-ask-for-how-much/>

Prosper Fundraising: *Moves Management: The Science Of Fundraising*

http://www.prosperfundraising.com/pdf/moves_management.pdf

Robert Weiner: *The Right Gift From The Right Person at the Right Time*

http://www.rlweiner.com/weiner_articles/tracking_your_prospects.pdf

Robert Weiner: *Back Away From That Spreadsheet: Why Excel Isn't a Donor Database*

http://www.idealware.org/articles/Excel_isnt_database.php

Robert Weiner : *Finding the Perfect Fundraising Database in an Imperfect World*

http://www.rlweiner.com/grf/grf_finding_perfect_database.pdf

Robert Weiner: *Ingredients of a High Performing Advancement Services Shop*

<http://www.rlweiner.com/ingredients-of-a-high-performing-advancement-services-shop>