



# Metrics Driven Major Gifts

**Creating the perfect balance between  
“hitting” your numbers and thinking big!**

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*Presented by Jay Angeletti*

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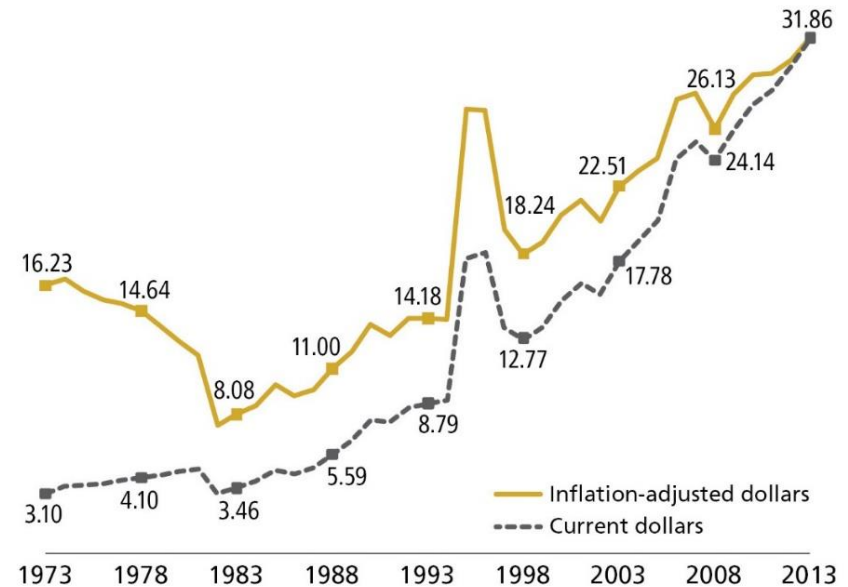
# WHY FOCUS ON MAJOR AND PRINCIPAL GIFTS IN THE FIRST PLACE?

# Big Gifts Are Back

- Contributions of \$50 million or more grew by more than \$800 million in 2014.
- The surge—a result of bigger gifts, not more of them.
- 2014 counted 40 contributions of \$50 million+ and 3 donations of \$500 million compared with 1 in 2013.
- 98.4% of high net worth households gave to charity in 2013.
  - They gave an average of 7.8% of their income.
- It is estimated that between \$6.6 trillion and \$27.4 trillion in charitable bequests will be made between 1998-2052.

# Giving to Health

- Contributions to the health sector comprised 10 percent of all donations received by charities in 2013.
- The steady flow of contributions to health in 2013 and recent years reflects donors' commitment to such causes as researching cures, supporting hospitals and other medical facilities, and buttressing health policy initiatives.
- Big gifts are back: focus on the top 5 percent (capacity) of your constituency.

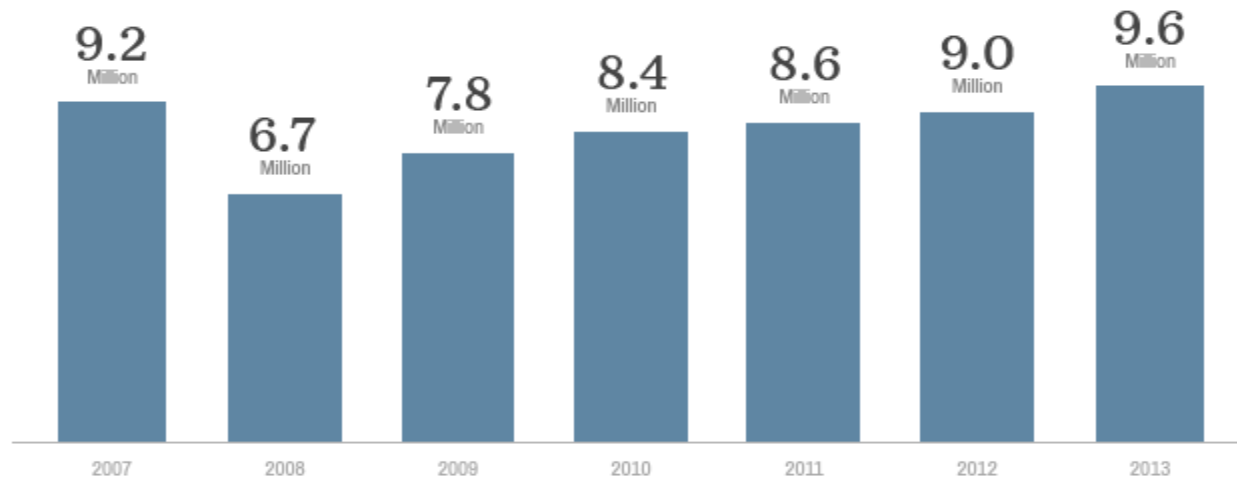


- Giving to health organizations grew 6 percent in 2013, totaling \$31.86 billion.

# Growing Wealth

- They're everywhere; the number of U.S. households with a net worth of more than \$1 million is up to 9.63 million, and the majority made that money in the last decade.

Number of millionaire households



SOURCE: SPECTREM GROUP, AFFLUENT MARKET INSIGHTS REPORT 2014

- The transfer of wealth to Baby Boomers is expected to reach between \$41 trillion and \$136 trillion.

# If that isn't reason enough...

- According to research from Giving USA, large gifts from individuals, and particularly major donors, typically represent up to 75% or more of total annual funding.
- The 90/10 rule:
  - Annual donations represent 90% of gifts, but only 10% of total dollars raised.
  - Major gifts represent 10% of gifts, but 90% of total dollars raised.

**ISN'T IT TRUE THAT BIG GIFTS  
COME FROM RELATIONSHIPS?  
WHAT DO METRICS HAVE TO DO  
WITH ALL OF THIS?**

# Fundraising Maxims

- People give to people.
- People give because they are asked.
- Personal visits result in larger gifts.
- Donors want impact.
- Donors deserve recognition.



# The Major Gift Cycle

Step	Action	Timeframe
Introduction	Event	
Personal follow up	Letter/Email	1 Week
Cultivation	Personal luncheon/site visit	6 Weeks
Briefing	First request	18 Weeks
Small gift (\$1,000-\$10,000)	Personal thank you	24 Weeks
Stewardship meeting	Hospital or hard hat tour	36 Weeks
Cultivation	Event	48 Weeks
Briefing	With physician	60 Weeks
Major gift request	Personal visit with volunteer	72 Weeks
Major gift commitment	Personalized thank you	78 Weeks

# HOW DOES ONE PUT TOGETHER A METRICS DRIVEN MANAGEMENT PROGRAM?

# Metrics Driven Moves Management

## What it is

- Organizing your work.
- Focusing on the prospects and activities that will bring the greatest return.
- Moving from individual work to winning as a team.
- Providing leadership with information and a reason, when ready, for greater investment.

## What it isn't

- Competing with colleagues.
- “Gaming” the system.
- Getting nervous and defensive.

# Metrics Driven Moves Management Meeting Structure

1. Annual, comprehensive portfolio review/rebalancing/top 25 prospect strategy sheets
2. Monthly prospect moves management meeting
3. Monthly one-on-one portfolio review meeting
4. Quarterly top 25 strategy session summit
5. Quarterly 90-day inactive/dropped prospect review

***Critically important to establish common language with respect to moves management terms and definitions.***

# Campaign Gift Table

\$100 million gift table		
\$ 10,000,000	1	\$ 10,000,000
\$ 5,000,000	3	\$ 15,000,000
\$ 2,500,000	5	\$ 12,500,000
\$ 1,000,000	10	\$ 10,000,000
\$ 500,000	20	\$ 10,000,000
\$ 250,000	50	\$ 12,500,000
\$ 100,000	100	\$ 10,000,000
\$ 50,000	200	\$ 10,000,000
	389	\$ 90,000,000
Less than \$50,000	Many	\$ 10,000,000
		\$ 100,000,000

# Fiscal Year Gift Table

\$20 million gift table		
\$ 2,500,000	1	\$ 2,500,000
\$ 1,000,000	4	\$ 4,000,000
\$ 500,000	6	\$ 3,000,000
\$ 250,000	16	\$ 4,000,000
\$ 100,000	20	\$ 2,000,000
\$ 50,000	50	\$ 2,500,000
	97	\$ 18,000,000
Less than \$50,000	Many	\$ 2,000,000
		\$ 20,000,000

# Major Gift Officer Gift Table

\$2 million gift table		
\$ 500,000	1	\$ 500,000
\$ 250,000	2	\$ 500,000
\$ 100,000	5	\$ 500,000
\$ 50,000	10	\$ 500,000
	18	\$ 2,000,000

# Portfolio Management

Staff	Portfolio Size	Portfolio Breakdown			
		Qualification (30%)	Cultivation (40%)	Solicitation (20%)	Stewardship (10%)
Full time (100%)	150	45	60	30	15
Part time (50%)	75	22	30	15	8
Part time (30%)	45	13	18	9	5

**HOW SHOULD WE MEASURE A FULL  
TIME MAJOR GIFT OFFICER?**

**AND WHAT LEVELS AND TYPES OF  
ACTIVITIES SHOULD WE EXPECT?**

# Annual Responsibilities of a Full-time Major Gifts Officer

## Moves Management by the Numbers

- 150 prospect portfolio
- 120 “moves” (substantive, strategic interactions with donors/prospects that move them from one step to another—for example from qualification to cultivation)
- 2.5 times dollar goal in solicitations
- 18 gifts of \$25,000+
- 25 newly identified prospects

Some of us have myriad responsibilities for events,  
direct response giving and internal meetings.

## HOW DO YOU COME UP WITH THE RIGHT METRICS?

# Factors Affecting the Metrics

- Time devoted to Leadership Support as compared to:
  - Management–staff and/or programs
  - Direct response and event initiatives
  - Senior operations group meetings/other responsibilities
- Volunteer management
- Staffing / physician engagement responsibilities
- Nature of prospect pool
  - Volunteer leadership
  - Ability to give
  - Inclination to give
- Development experience
  - In general
  - At the organization
- Length of time in current position
- Stage of funding priority development

# HOW DOES AN OFFICER “MOVE” PROSPECTS?

# Cultivation Tools

- “Door-opener” letter from leadership
- Staff-led Feasibility and Planning Study interview to seek advice and to secure feedback on system priorities
- Special receptions
- White coat tour of new facility/equipment
- Visit from trustee
- Visit from Hospital CEO (if \$100,000+ request planned within 18 months)
- Visit with physician
- Volunteer opportunity

# HOW DO YOU GET TRACTION WITH PROSPECTS?

# 1. Find Out About Prospect

- What type of business?
- What is prospect's position?
- How is business?
- Family (spouse, children, organizational affiliations?)

## 2. Tell Prospect Why You Are There

- Visiting patients who use the hospital:
  - to bring them up-to-date on news about the hospital.
  - to learn about their patient experiences and to report back to leadership.
  - to find out if the organization's communications are reaching people.
  - to determine lay of the land – leading businesses in the area.
  - to raise money.
  - to build awareness for the hospital's growing service lines, emphasis on preventive medicine and role in the community including as a major employer and economic driver.

### 3. Probe Ask For Leadership Support

- Leadership support gifts—as part of grateful patient/concierge levels—or higher when appropriate.
- Emphasize participation, next gift level as good next step.
- Try to clarify interest areas—community focused? Specific disease/condition interest? Review funding priorities if appropriate.

## 4. Determine other philanthropic interests

- Obtain sense of philanthropic priorities – where does healthcare and the hospital fit in?
- Hobbies/other interests.

# After The Visit

- Outline “next step.”
  - Invite to site for an event or tour.
  - Emphasize your availability as an extension of the CEO—as a hospital contact/navigator.
  - Add to your “outreach list.”
  - Prepare proposal if warranted.
  - Follow-up on prospects who were identified.
- Review ways prospects can help.
  - Consider making gift/increasing support.
  - Introduce hospital to others who can help.

# ABOUT THE ANGELETTI GROUP, LLC

# Our Services

## Feasibility Studies/Campaigns

- Executive Counsel
- Metrics-driven Moves Management
- Planned Giving Counsel
- Recognition and Stewardship Strategies
- Insider's Briefings
- Signature Campaign Launches

## Annual Giving

- Cross Media Strategies including Direct Response, Telemarketing & Social Media
- Predictive Modeling

## Corporations & Foundations

- Identification
- Grant writing
- Board of Visitors and other leadership programs

## Events & Communications

- Case Development
- Internal/External Campaign Marketing
- Targeted Events/ Briefings

## Advancement Services

- Prospect Research & Wealth Screening
- Raiser's Edge and other information database expertise

# The TAG Difference

- Organized as a development office rather than a typical consulting firm
  - Fewer assignments with deeper engagement
  - Support all aspects of the development function
- Principal involvement and supervision
- Built on professionals with real development experiences
  - Consulting after experiences on the other side of the desk
  - “Best practice” AND “off template”
- Founded with experience from the nation’s best development programs
- Dedicated team for each client partner



# Jay Angeletti

- 25+ years as a development professional prior to serving clients as a consultant
  - Choate School
  - Yale School of Medicine
  - University of Pennsylvania Health System
  - Drew University
  - New York-Presbyterian Health System
    - Led historic \$1 billion campaign
    - Completed 3 years ahead of schedule
    - Conceived and managed first campaign of the merged hospitals
    - Instituted best practices\metrics\new culture of philanthropy for merged board and across all sites

# THANK YOU.

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