

TRANSFORMING

BAPTIST for the FUTURE

Major Gift Fundraising

November 3, 2021

Outline

1. Building Your Case for Support
2. Finding the Right Prospects & Building Relationships
3. Building Your Proposal & Making the Ask
4. Gift Agreements & Recording the Gift
5. Donor Appreciation & Recognition
6. Renewing the Gift



Case for Support

Building Your Case

- A short history of your non-profit
- Statistics related to your Mission
- Stories, quotes, and photos from your beneficiaries
- A letter from your CEO
- Financial information for nonprofit
- Quotes or stories from other donors explaining why they give to your nonprofit



Case for Support



LETTER FROM MARK FAULKNER

On October 30, 1949, our founders broke ground to build Baptist Hospital with the purpose of bringing more modern health care to our community. Exactly 71 years from that date, we broke ground again. Continuing our founders' bold vision and legacy, Baptist is making this investment to transform care in our community and improve the quality of life for generations to come.

Our new home – the main hospital and health campus at the corner of Brent Lane and I-110 – furthers our journey to bring a modern and more accessible approach to health care to our region. The New Baptist Health Care Campus will be an innovative, convenient, safe and compassionate place to provide and receive care, incorporating modern efficiencies in a healing environment.

Nothing of its kind has been imagined or currently exists in our area. We celebrate the single largest investment in health care facilities, services and programs in Northwest Florida's history and our legacy of putting people first. The new campus will incorporate state-of-the-art technology, a concentration of related services and enable a modern approach to access, patient experience, wellness and care.

Like those we serve, our community and our world, we have experienced many challenges in this past year. The challenges of 2020 have confirmed the critical role Baptist plays in stepping up to serve our community at all times and especially when we are needed most.

Just as the community responded to the call for support by our founders, we are asking again for the same partnership and commitment to ensure we can accomplish the grandest of our visions for this once-in-a-generation transformational opportunity.

As you read and visualize the impact this investment will have for the health of the community, I ask that you join us as a partner in philanthropy to support this transformation.

Sincerely,
Mark



IMPACT

PEOPLE FIRST

In Pensacola and our surrounding region, we rely on anchor institutions like Baptist Health Care to lift our economy and support our very way of life. However, an investment in health care is so much more; it's an investment in people of all genders, races, ages and socioeconomic classes. It's an investment in community. Putting people first guides and influences everything we do at Baptist.

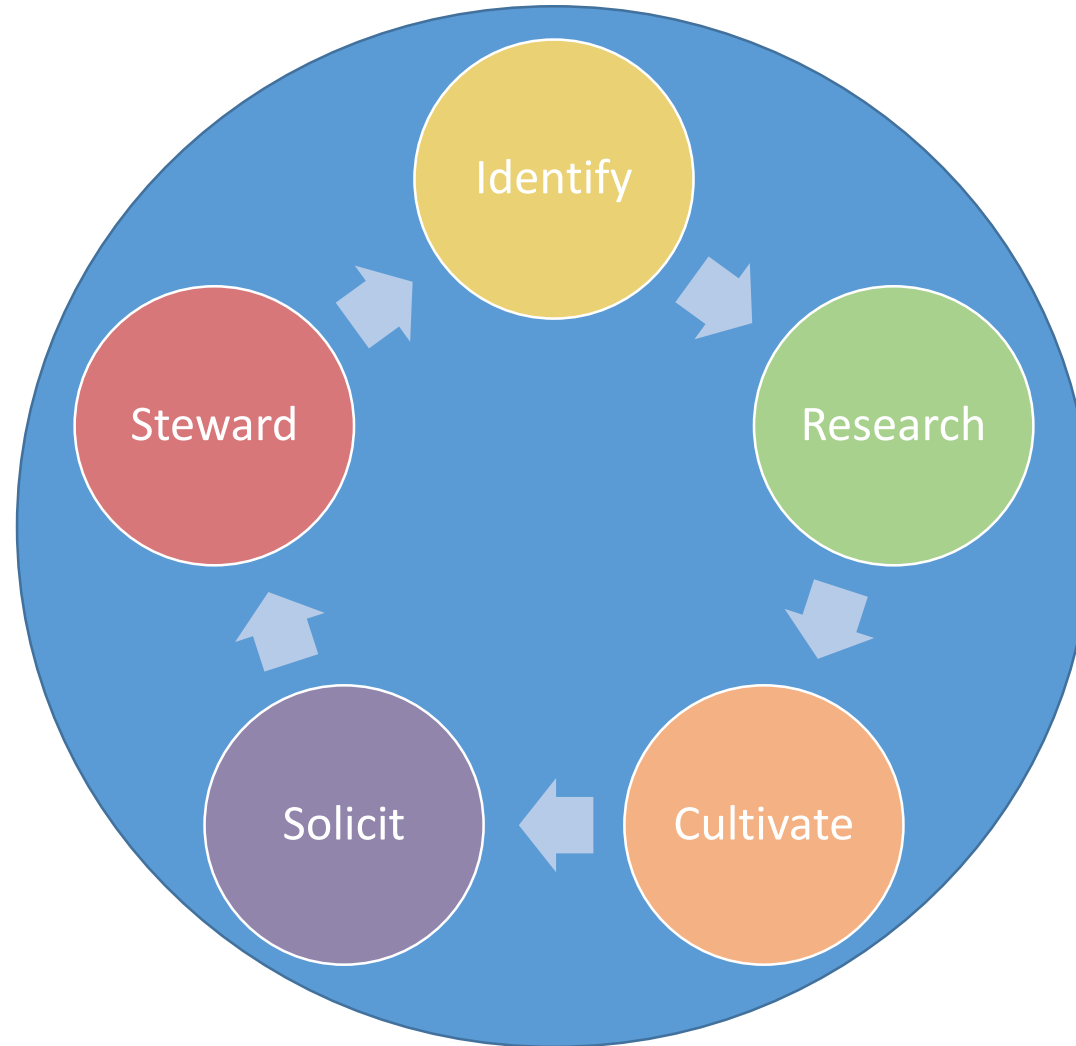
We remain the only community-owned and locally governed health care system in the region and are privileged to be given the responsibility to do what's right for this community, today and far into the future. We believe there is no greater impact you can make than in people's health and well-being — people we call friends, neighbors, colleagues and family.



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Donor Cycle



Finding the Right Prospects

Build Your Pipeline from Within

- Look at annual and mid-level giving
- Assess loyal and consistent annual donors

Attracting New Donors

- Build a profile of ideal prospects
- Conduct prospect research



Finding the Right Prospects

Prospect Research

- Identify major gift prospects
- Update biographical information
- Find new prospects
- Map out cultivation
- Explore engagement opportunities



Building Relationships

What's the difference between cultivation and stewardship?

- **Cultivation:** Building a relationship with a prospect
- **Stewardship:** Relationship building and communication that starts after a donor makes a gift



Cultivation

Donors make charitable decisions based on several factors:

- Personal experience
- Connection to family & friends
- Opinion of organization's leaders
- Public knowledge of the organization
- Affinity for your Mission



Building a Proposal



**IS IT IMPORTANT
TO KNOW AND
UNDERSTAND THE
DONOR BEFORE
WRITING A
PROPOSAL**

Building a Proposal



- Personalize it
- Align the ask to their philanthropic goals
- Put a dollar amount
- Focus on the impact
- Preview of stewardship opportunities

Making the Ask

- Call and schedule the meeting
- Who attends the meeting
- Where is the meeting held
- Preparing for the meeting
- What language to use



Gift Agreements



- Set timelines
- Manage expectations
- Protect your organization
- Create positive and professional experience

Recording the Gift

Reporting Needs

- Coding/linking gifts

Donor Requests

- Tracking naming rights/preferences

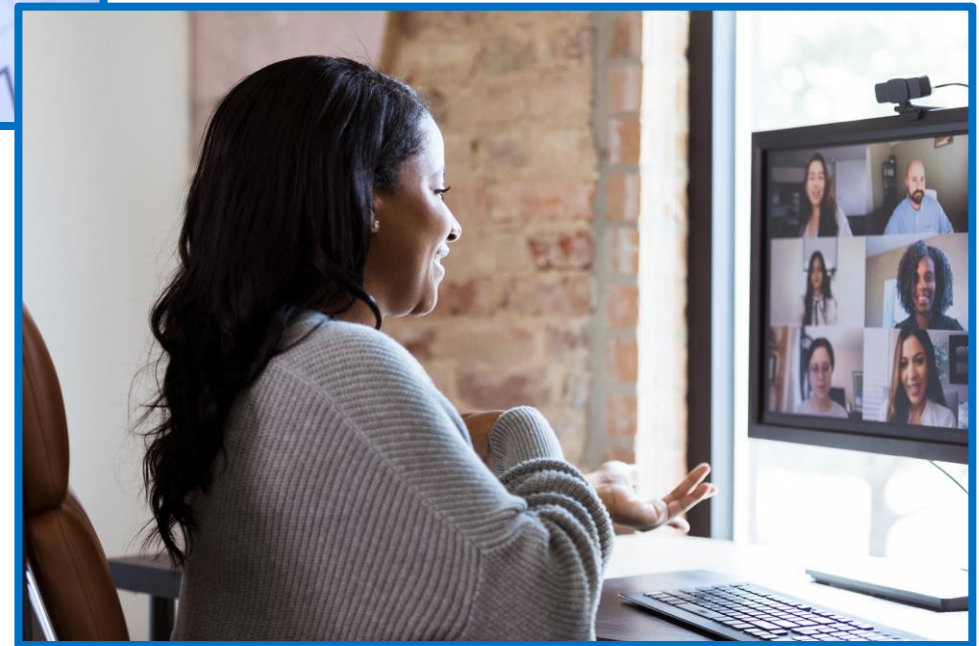
Clear Documentation Policies

- What to do before the gift is made



Pledge Payments and Invoicing

- Pledge Reminders
- Donor Communications



Stewardship

All major donors should have a stewardship plan to:

- Help keep the donor engaged
- Continue cultivation for their next gift
- Make them feel appreciated



Manage the gift(s) the way a donor intended

Keep them involved & report back on how their gift made an impact – be specific

Stewardship Plan

Create a matrix based on your giving levels

Example:

- Donors under \$500 receive a thank you letter and quarterly newsletter
- Donors over \$500 - \$5,000 receive all of the above plus a handwritten note from the CEO and a mention on Facebook
- Donors above \$5,000 receive all of the above plus a personal tour and donor spotlight on the website



Donor Appreciation

Be Genuine, Be Personal, Be Visual

- Donors don't want a bunch of stuff with your logo on it – not a good resource of their funding
- A personal thank you is more meaningful – be thoughtful and include a story if applicable
- Show their ownership in your Mission - “you” did this versus “we” did this



Donor Recognition

Be intentional and create a plan for all gift levels

Examples:

- Personal thank you note from CEO
- Gift Announcement
 - Check presentation and photograph
 - Donor spotlight for publicity / social media
 - Press release
- Special invitation / tour
- Plaque to commemorate the gift



Renewing the Gift



- Stay in touch
- Report often on impact of gifts
- Consider other ways to give

Thank You!

