

Best Practices

TRF Fund Development

Major Gift Fundraising Strategies

**Voices
from the
Field**

- Review the list of Paul Harris Society prospects. Consistent contributors of \$1000 or more could have the capacity for a greater one-time gift and could be invited to a Major Donor recognition event as a cultivation tool.
- Using the Paul Harris Society list, see if members would consider an estate gift of \$25,000 or more (if they aren't Bequest Society members already). A BS Level 2 estate gift has the potential to net above \$1000 in annual returns, making the donor a Paul Harris Society member in perpetuity. Promote restricting it to APF/SHARE to ensure that 50% of the earnings directly benefit District Designated Funds in future years.
- Review the list of Major Donors and Bequest Society members: who is a Major Donor but not yet a Bequest Society member? Cross-reference that list with the Club Recognition Summaries and see who is a Benefactor/Major Donor but not Bequest Society member. These Rotarians could be approached to upgrade their Benefactor commitment to Bequest Society.
- Estate Planning Seminar. These can be very helpful in terms of prospect identification, education & cultivation, and ultimately leads to productive solicitations. Identify volunteer experts in your area that could act as moderators or instructors.
- Million Dollar Dinner. There have been about a half dozen of these events in the past five years featuring a senior RI Leader as the special guest. Each dinner has been successful, raising between \$1 million and \$4.2 million in outright gifts, planned gifts and commitments. The systematic approach used helps to identify prospects by members of the dinner committee, and creates an impetus for a significant number of major gift solicitations within a defined period of time.
- Bequest Society Focus (1). You may want to consider approaching each D5340 Bequest Society member in D5340 to ask them to consider fulfilling part or all of their commitment that they have made during their lifetime instead of through their estate. Donors may want to consider seeing their contributions Doing Good in the World during their lifetime, so that they can appreciate the impact of their support while they are still with us.



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- Continue to build the list of Paul Harris Society prospects. Consistent contributors of \$1000 or more could have the capacity for a greater one-time gift and could be invited to a Major Donor recognition event as a cultivation tool.
- Using the Paul Harris Society list, see if members would consider an estate gift of \$25,000 or more (if they aren't Bequest Society members already). A BS Level 2 estate gift has the potential to net above \$1000 in annual returns, making the donor a Paul Harris Society member in perpetuity. Promote restricting it to PF/SHARE to ensure that 50% of the earnings directly benefit District Designated Funds in future years.
- Donor Enhancement. You may want to develop a two-pronged effort with your current Major Donors and Bequest Society Members. Review the list of Major Donors and Bequest Society members: who is a Major Donor but not yet a Bequest Society member? One approach would be to ask your current Major Donors if they would consider becoming Bequest Society members. Alternatively (or simultaneously), you may want to ask your current Bequest Society members if they would consider becoming Major Donors. Cross-reference that list with the Club Recognition Summaries and see who is a Benefactor/Major Donor but not Bequest Society member. These Rotarians could be approached to upgrade their Benefactor commitment to Bequest Society. Both subsets of donors have already made a financial commitment to TRF, so the likelihood of success is higher than many other solicitation efforts.
- Planned Giving Seminar. These can be very helpful in terms of prospect identification, education & cultivation, and ultimately leads to productive solicitations. Clearly, you have a lot of expertise in your own district to create a Planned Giving Seminar, or perhaps even utilize local Rotarians to address Estate Planning options.
- Million Dollar Dinner. There have been about a half dozen of these events in the past five years. Each dinner has been successful, raising between \$1 million and \$4.2 million in outright gifts, planned gifts and commitments. The systematic approach used helps to identify prospects by members of the dinner committee, and creates an impetus for a significant number of major gift solicitations within a defined period of time.
- Bequest Society Focus (1). You may want to consider approaching each Bequest Society member to ask them to consider fulfilling part or all of their commitment that they have made during their lifetime instead of through their estate. Donors may want to consider seeing their contributions doing good in the world during their lifetime, so that they can appreciate the impact of their support while they are still with us.
- Bequest Society Focus (2). Another concept is to approach each Benefactor in the district to ask them to consider increasing their estate commitment to TRF to at least \$10,000 and become members of the Bequest Society. Often, individuals have been approached as they are updating their estate plans, and a timely request can create significant support for TRF in the future.



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- **Major Donor Upgrades.** Often, districts will ask multiple Paul Harris Fellows if they would like to increase their giving to TRF to become Level One Major Donors. This can be a productive endeavor. However, you may also wish to focus on your current Level One Major Donors to ask them to consider moving up to Level Two. It will be a smaller and more manageable subset of donors to approach, with a significant potential for increased support for TRF.
- **Fireside Chats.** Small events held for prospective Major Donors can be quite successful. Several couples may be invited to the home of a district leader and/or current Major Donor, and a TRF alumni (Rotary World Peace Fellow, Ambassadorial Scholar, GSE Team Leader, Matching Grant participant) could be the featured guest. While timely follow up is key, these events can ultimately lead to a significant number of major gifts and commitments.
- **100% Benefactor Clubs.** While not a TRF recognition program, I have heard of several Rotary Clubs who have noted that 100% of their membership are Benefactors. It may be a recognition program that your district would like to consider as a way to have a broad appeal for smaller yet meaningful commitments to TRF, and a building block for the Permanent Fund and larger future commitments and gifts. This is a big stretch, but building on the idea 100% PHF Clubs and 100% Benefactor clubs we have now recognized our first 100% Major Donor club in Korea. I'd expect clubs are working on 1005 Bequest Society as well.
- **Major Donor/Bequest Society/Paul Harris Society Functions & Recognition.** Whenever possible, I would encourage you to have Major Donor & Bequest Society functions to thank the current TRF supports in the District. Often, it is easiest to hold these events in conjunction with other planned functions--District Conferences, TRF Seminars, etc. If you are unable to have a Major Donor or Bequest Society function at a given event, at a minimum it is important to recognize the attendees who have made a significant commitment and/or outright gift to TRF.

