

Major Donor Fundraising

A Case Study of



By Tanja Bjelanović & Tony Myers
October, 2017



CEE FC, Bratislava

Welcome



Tanja



Tony



You

Agenda

1. INTRODUCTION

2. CONTEXT

3. WHAT WE DID?

4. WHY WE DID IT?

5. HOW WE DID IT?

Agenda

6. WHAT WE DID WELL

**7. WHAT SHOULD HAVE BEEN
DONE DIFFERENTLY?**

8. WHAT HAVE WE LEARNED?

9. WOULD WE DO IT AGAIN?

10. WHERE WE ARE NOW?

11. CONCLUSIONS

1. INTRODUCTION

2. CONTEXT

The state of philanthropy in Serbia

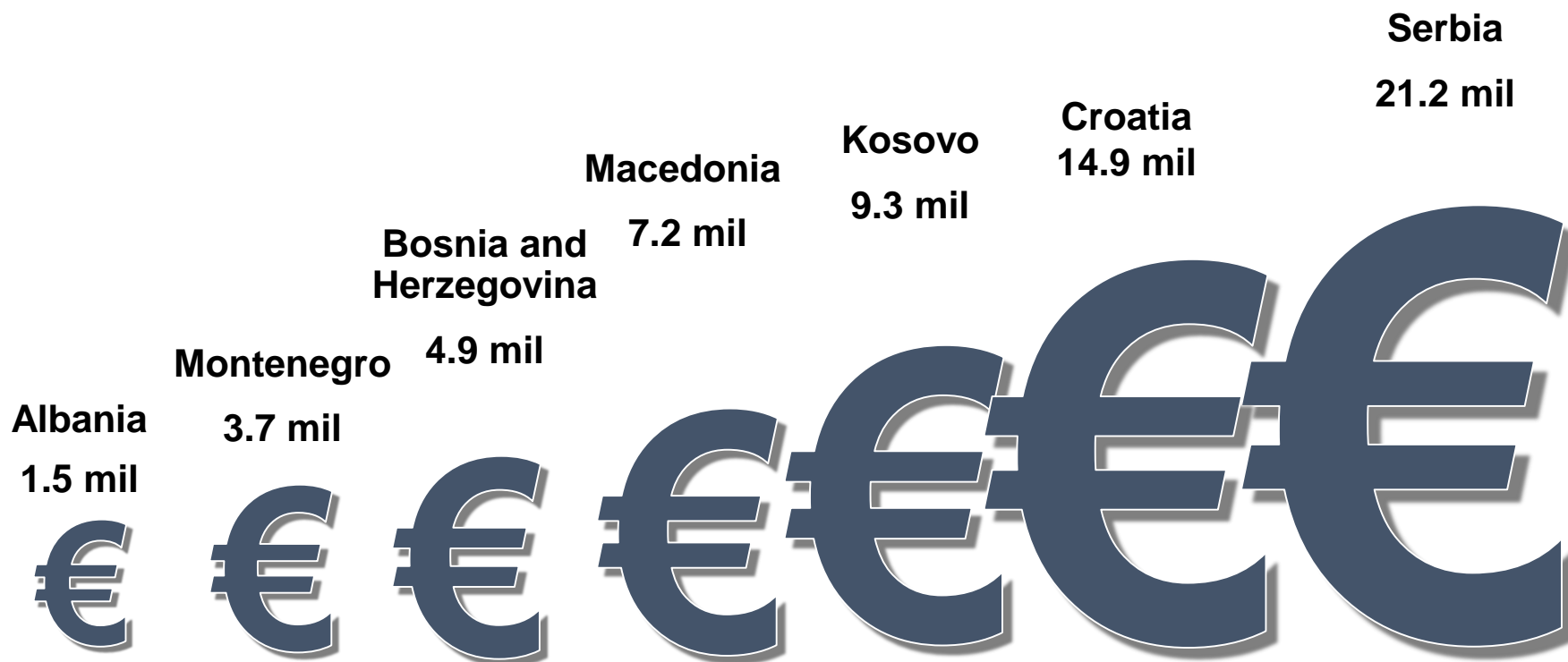
CAF World Giving Index 2017

Serbia is overall at the **132** place,
with **18%** of population giving:

Category	Ranking	Score
Time/Volunteering:	137	21%
Money	73	25%
Helping a stranger	129	7%

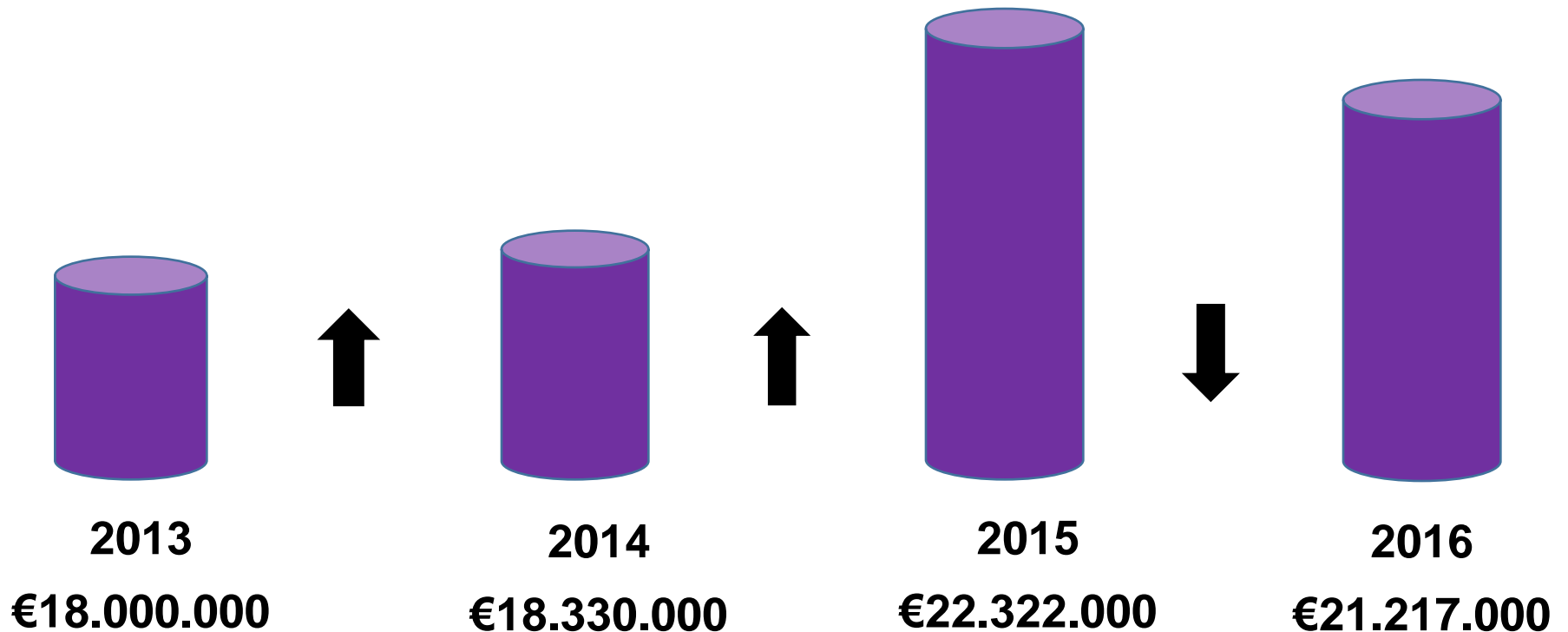
However, still leading in the Balkans region in terms of money

(Estimated by: Catalyst Balkans
www.catalystbalkans.org)



Total Value of Donations in Serbia over time

(Estimated by: Catalyst Balkans)

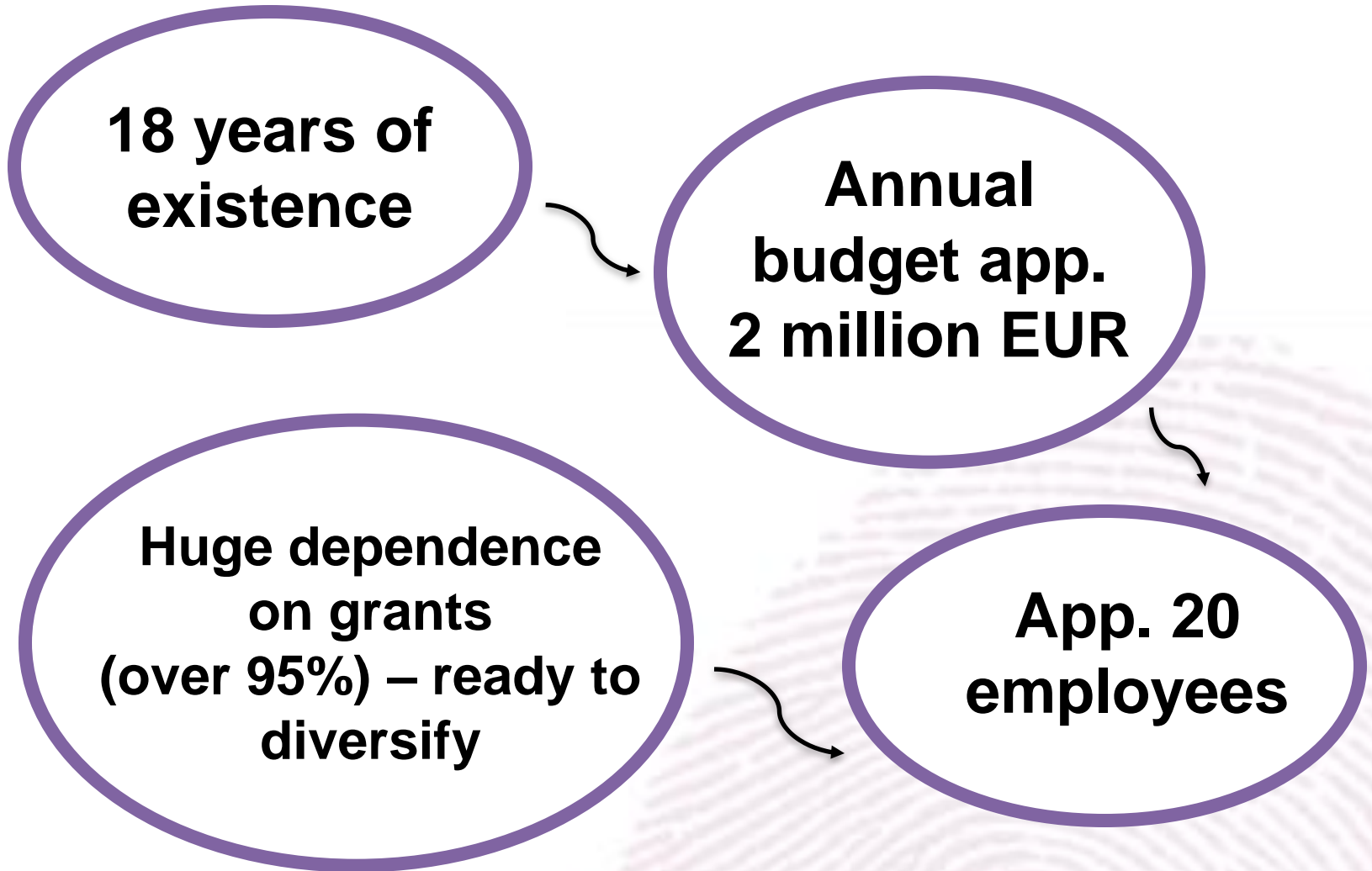




Trag Foundation

A leading local foundation in Serbia and the Balkans that supports **community development** through grants, capacity building and philanthropy promotion.

Trag Foundation's stage of life



An Aspiration and an Opportunity

Board's idea

Board has considered for many years to establish an Endowment Fund, with a vision of Trag to become a sustainable, financially stable and independent local foundation.

C. S. Mott offer

In 2012 C. S. Mott, as part of its exit strategy from the CEE region offered to support a Trag initiative to establish an Endowment fund.

Endowment building strategy

Timeline: **2012 - 2017**
Goal: **raising \$ 250,000**
Total target: **\$250,000 + \$500,000 = \$750,000**
Mott's challenge **each 1\$ raised by Trag, Mott gives \$2.00**

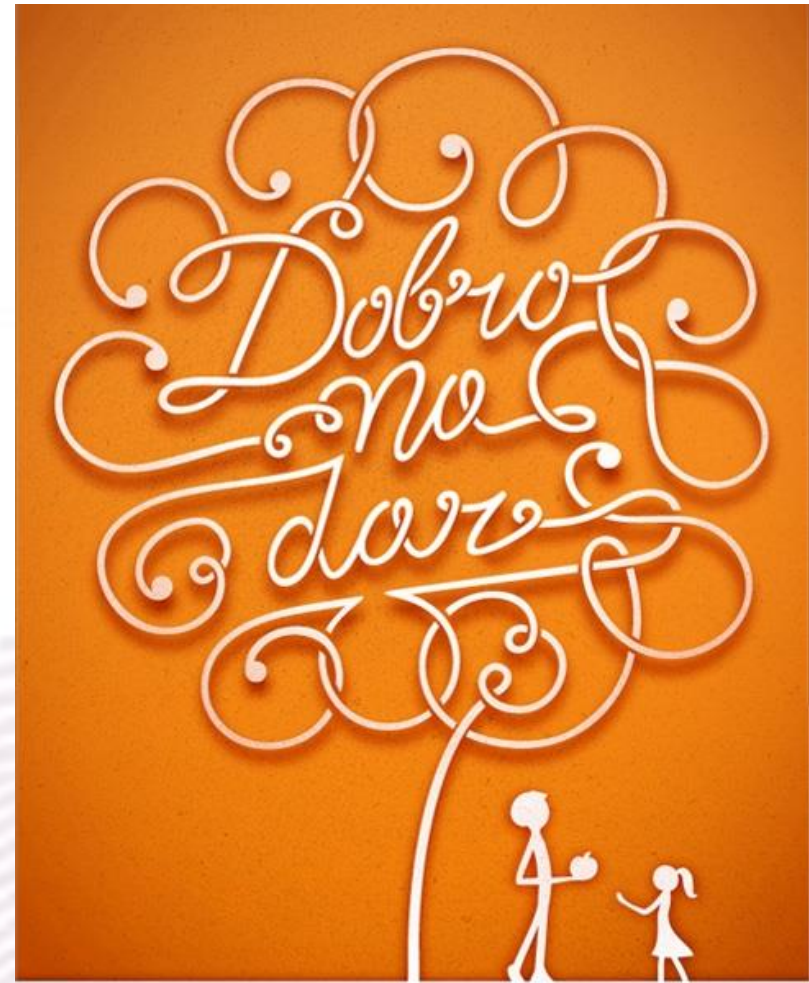


How did we start: 2012 - 2014

Annual Giving
campaigns
Kindness as a Gift

Over 120 individuals,
6 companies,
10 CSOs

A total less then \$
15,000



3. WHAT WE DID?

Evolving the strategy in 2014 – Individual Major Gifts

A MAJOR GIVING CAMPAIGN

4. WHY WE DID IT?

WHY

To raise \$250,000 USD we needed to consider major gifts and targeted audience

We have heard of
VIA Foundation's case

We met with Tony :)

5. HOW WE DID IT?

Landscaping – steps

Feasibility study – good results but trust is an issue in Serbian Society

Setting the goal - Possible to raise \$250,000 (between \$80,000 and \$130,000 without Rotary)

Developing a Plan and adopting by the Board

Approach

List of **300/40** names

Criteria: **influence & affluence**

Case for Support

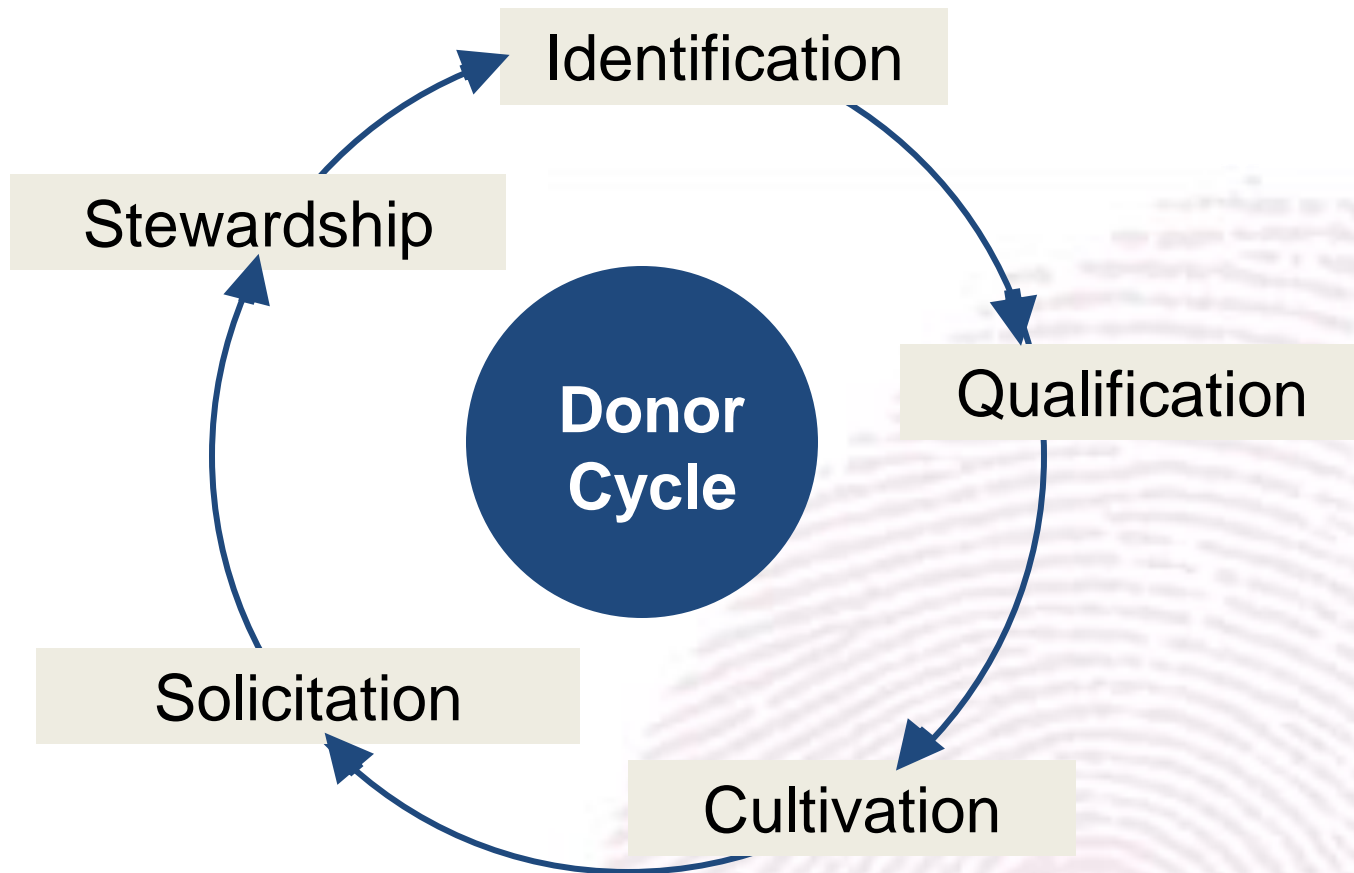
Campaign **Cabinet**

Approach

TRAG FOUNDATION GIFT RANGE CHART – \$ 250.000

GIFT SCALE	QUALIFIED DONORS	NO. OF GIFTS	GIFT RANGE	TOTAL	% OF THE TARGETED AMOUNT
LEAD GIFTS	4	1	\$50.000+	\$50.000	82%
	4	1	35.000	35.000	
	8	2	20.000	40.000	
MAJOR GIFTS	16	4	10.000	40.000	
	32	8	5.000	40.000	
SPECIAL GIFTS	48	12	2.000	24.000	
	84	21	1.000	21.000	
TOTAL	196	49	--	\$250.000	100%

Donor Cycle



What happened?

Campaign lasted
36 months instead of 24

We worked with **18 prospects**

We had **8 donors**

What happened?

We made **11 asks**

We had **16 pledges**

We collected **13 gifts** from **8 people**

We raised **\$ 77,813**

What happened?

Average gift was **\$ 6,000**

8 out of 13 gifts were made **without an ask**

5 out of 11 asks **resulted in gifts = 45%**

1/2 of donors were new to Trag

What happened?

**57% of the Board
members contributed**

**Over 70% of staff
members contributed**

**Let's take
a look at what
happened!**

**What
did you
see?**

6. WHAT WE DID WELL?

Things done well?

Feasibility Study

Campaign Plan

**Assigned the team
and timeline**

Things Done Well

Recruited the Cabinet

Case for Support

7. WHAT SHOULD HAVE BEEN DONE DIFFERENTLY?

Things to do differently

- > **No history of major donor fundraising** and no system in place (for relationships with major donors)
- > **List of 300** – be real (individuals, corporations, associations)
- > **Rotary** - realistic gift range and the target

Things to do differently

Leadership – internal and external

Priority, discipline, team, momentum

Be honest, working or not working

Things to do differently – external challenges

- > **Set the tone** and the bar higher
- > **Dealing** with the transactional mid-set
- > **Gender issue and the perception of young and middle-age women fundraising**
(power game, gender balance)

8. WHAT HAVE WE LEARNED?

Lesson no. 1

Realistic assessment of the
level of giving in your context

Gift Range Chart

Lesson no. 2

Leadership is essential

**Internal and external
(volunteering)**

Lesson no. 3

Be bold and decisive

**Do not spend much time on debate
over the process and
how to do it, and overcome
the fear of asking**

Lesson no. 4

Human resources and Prioritization

Lesson no. 5

Keep the **momentum!**

9. WOULD WE DO IT AGAIN?

BENEFITS FOR TRAG

- Raised nearly **80,000 USD** through major giving and 225,000 in total
- Positioned as a **leader** in the region in building the Endowment
- Gained **know-how** in major giving, confidence in asking big

BENEFITS FOR TRAG

- Built **relationships** with people of affluence and influence, learned how to talk their language
- **Enriched Board** membership - Misha
- Developing **philanthropy in Serbia**

10. WHERE WE ARE NOW?

Endowment Fund – current situation

Collected so far
230,480 USD

loading...



19,520 USD
Needed



11. CONCLUSIONS?

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