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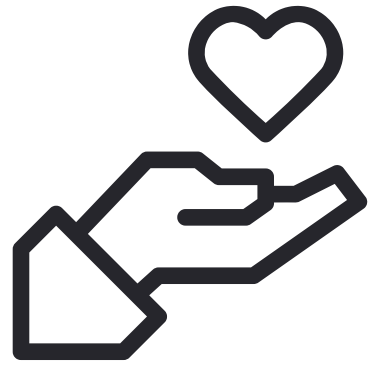


bloomerang

Major Gift Best Practices + Philanthropy Trends

Condensed version to share

January 2025

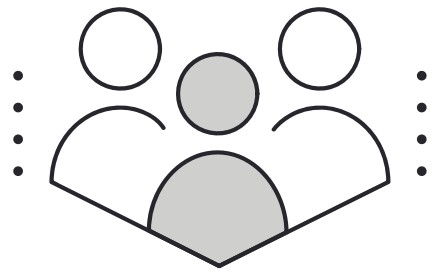


INDIVIDUALS



\$374.40B

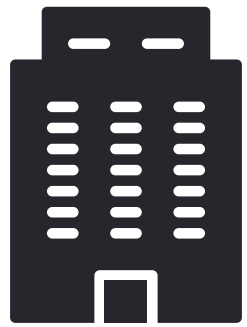
Increased by 1.6% from 2022



FOUNDATIONS

\$103.53B

Grew by 1.7% from 2022



CORPORATIONS

\$36.55B

Increase of 3% from 2022



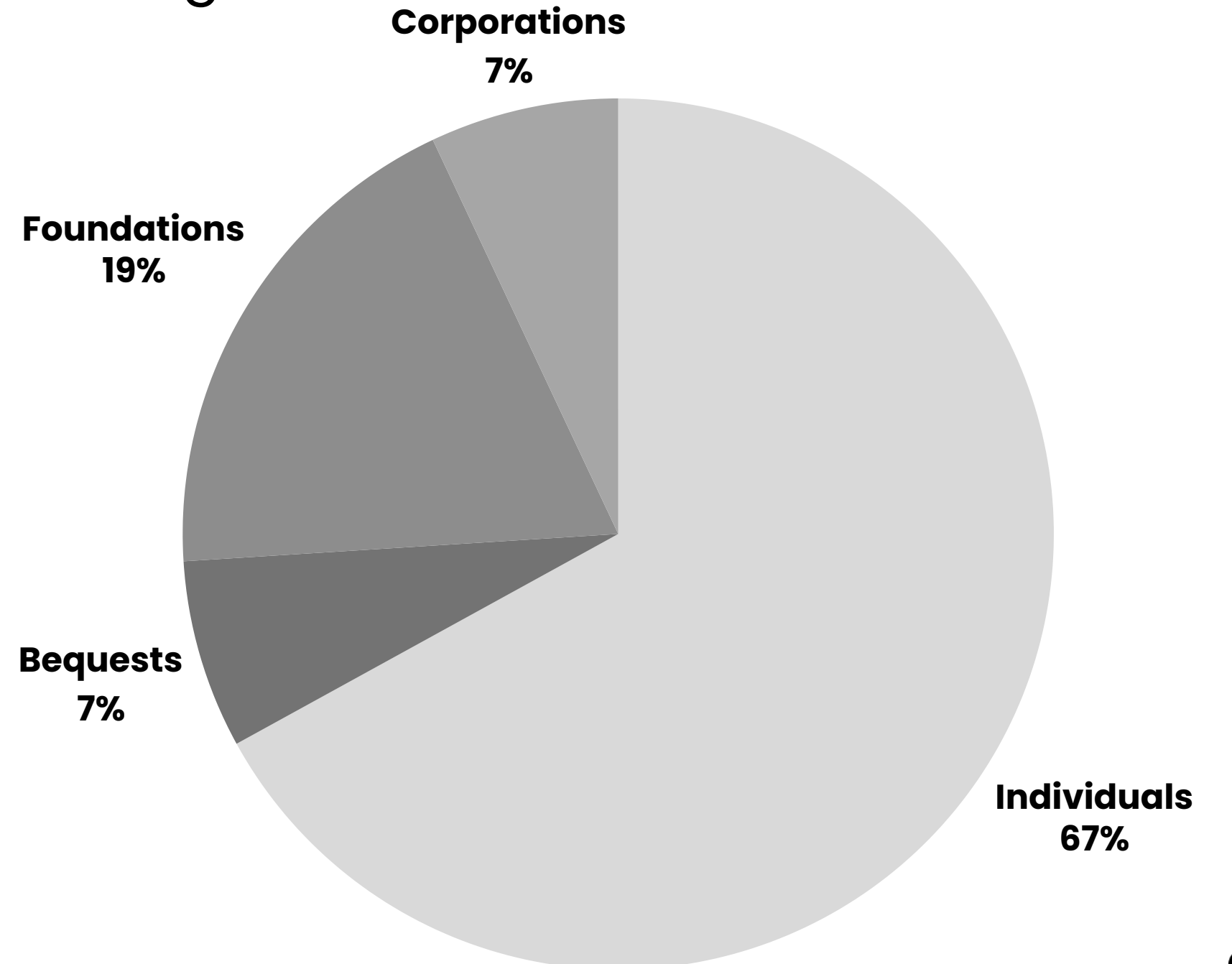
BEQUESTS

\$42.66B

Up 4.8% over 2022

Breakdown of USA Charitable Giving Report 2024

Total given to charities in 2023: **\$557.16B**

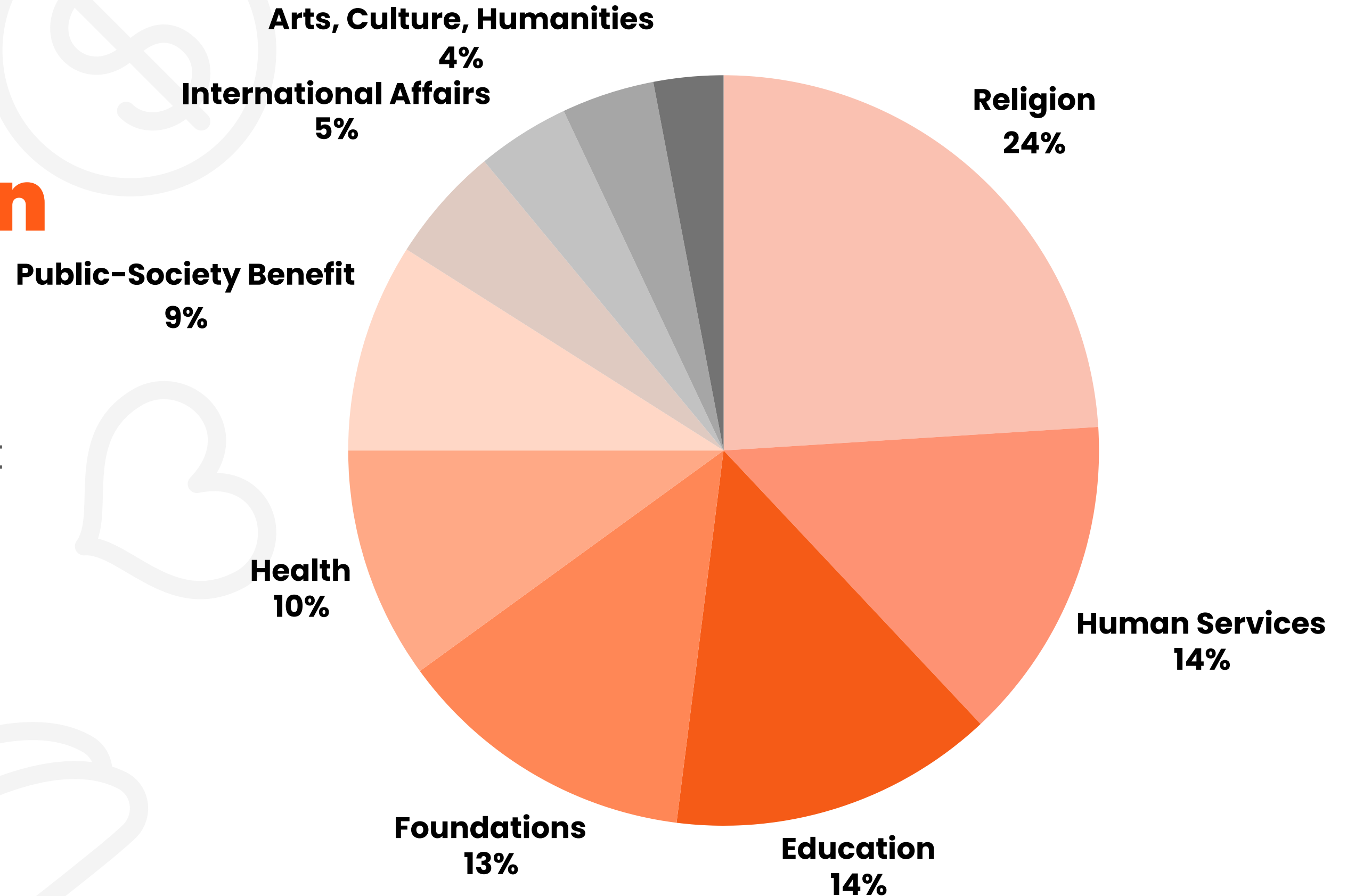


Source: 2024 Giving USA Report (Giving USA Foundation in collaboration with Lilly School of Philanthropy)



Where does your organization rank?

Breakdown of 2024 USA Charitable Giving Report



Source: 2024 Giving USA Report (Giving USA Foundation in collaboration with Lilly School of Philanthropy)



**Those with
wealth are
only growing
their capacity.**



In 2010, 62 billionaires signed the Giving Pledge.



Their wealth has almost **doubled** from \$376 billion in 2010 to \$734 billion in 2020.

**Today's trend:
Larger Gifts from Fewer People.**



Initiatives are largely funded by few people.

**\$100m
GOAL**

**\$76M
RAISED**

**17
DONORS**

Case Study 1: South Florida STEM Campaign

**~\$2M
RAISED /
YR**

**6
FAMILIES**

**65% OF
\$2M**

Case Study 2: Annual Fund at Private School in New York

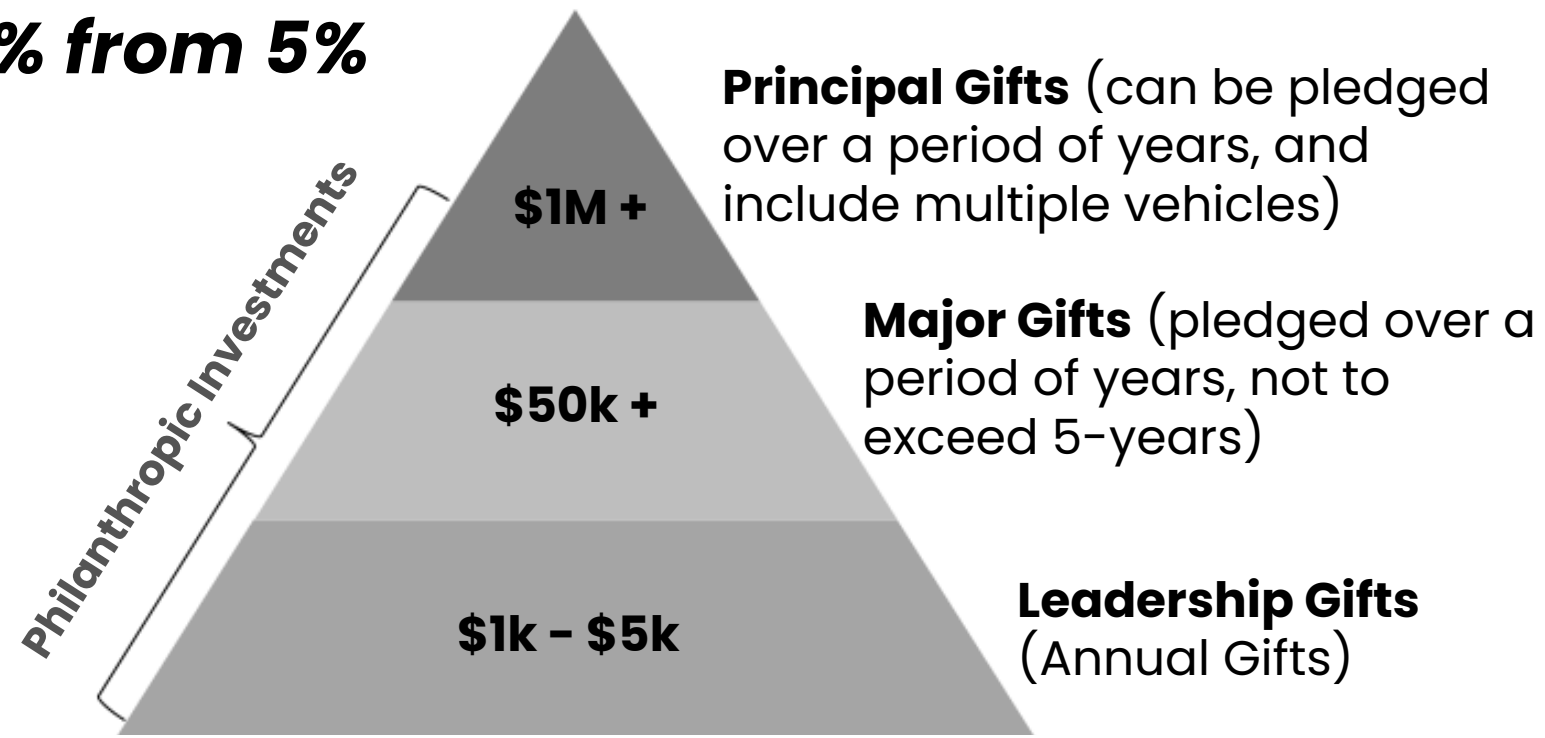


What did these organizations do right?

- Team's time allocation
- Specificity in asking
- Aligning personal interests with org needs (custom)



95% from 5%



Philanthropic Investments

- Build relationships over time
- Utilize internal and Board partners
- Make solicitation once relationship is engaged
- Document gifts with proposals, pledge forms, commitments

Donations & Exposure

- No in-person relationship building: broad communication by email, mail, social media
- Gifts received quickly after appeal
- Rely on full team to collaborate on mailings, graphics, talking points (broad base engagement)





What do philanthropic investors care about?

**That you know + talk about
your organization
like a business.**





Focus on the areas that create vision and generate outcomes:



Leadership, including Board



Strategic vision
(*The foundation of a campaign initiative)



Partnerships



Messaging and raising support



Sustainability



Outcomes – what impact does my investment generate?



Qualification

The most important stage, influencing the rest of the journey significantly.

Listen more, talk less (ask a lot of questions)

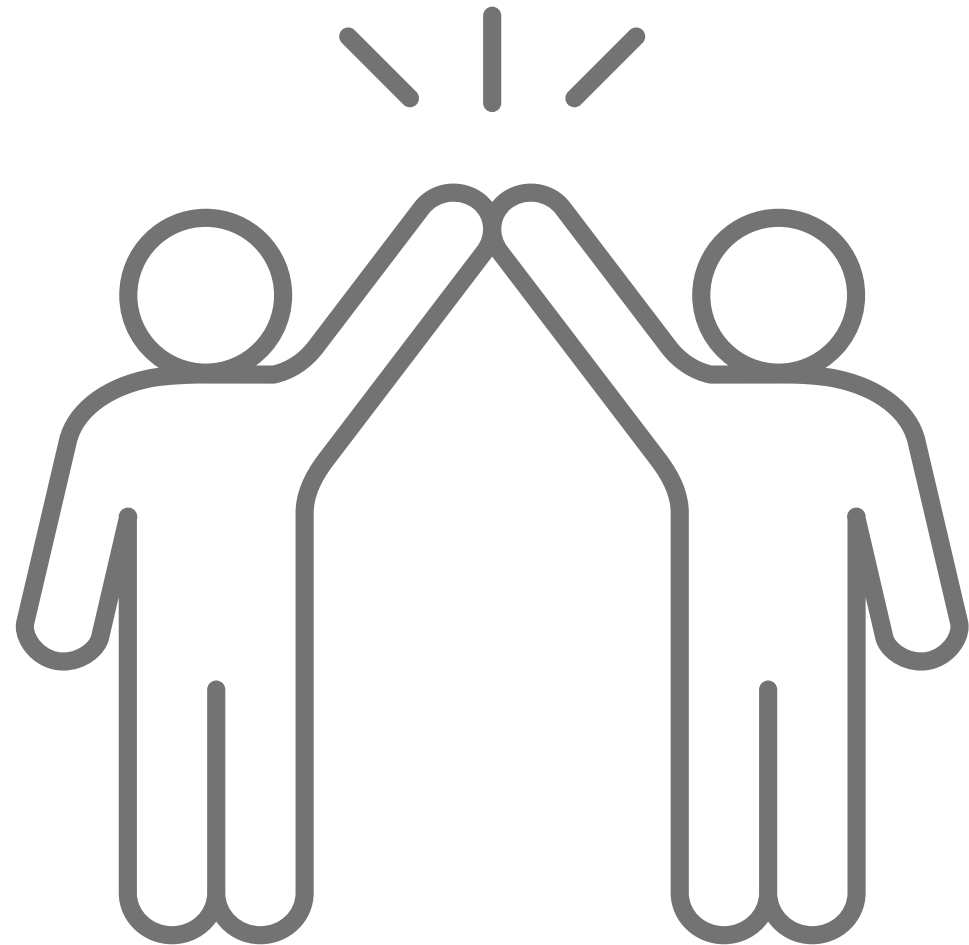
Be prepared with "business information" about your nonprofit

Assess capacity and affinity

Secure the next step in the first meeting



Cultivation Tools for Relationship Building



- Events + Cocktail parties
- On-site visits + tours
- Programmatic updates and newsletters
- Notes from leadership
- Videos + photos
- Updates by email, phone, text
- Coffee with board members

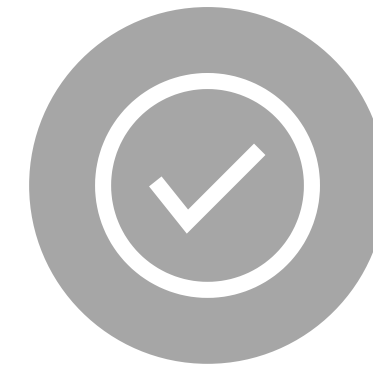
Making Solicitations that Have Impact



**Respond to
their
interests** and
your needs.



Educate
before you
ask.



Confidently
ask for an
investment in
realistic and
aspirational
priorities.



**Listen for indicators of stock, estate planning, matching gift opportunities and use them to maximize blended gift levels.*



What's a campaign?



1

Has a start date, an end-date, and a defined goal.

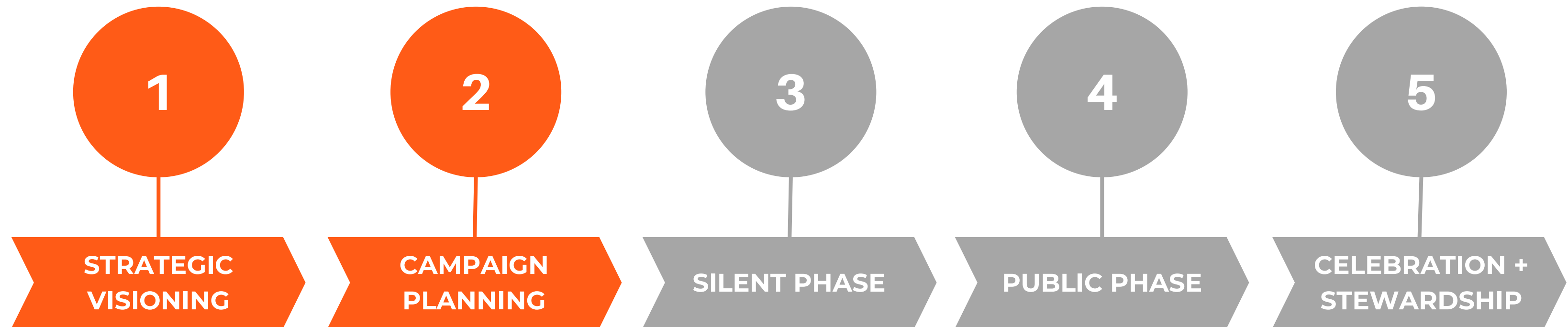
2

Is driven by the leadership's strategic vision and priorities.
**Bigger ideas = better stories
= bigger investments**

**Capital vs. Comprehensive vs. Annual
ideal = ▲**



Campaign Phases



Time to set: aspirational vision

Time to start: custom donor journeys

Campaign Planning is the most critical part to any campaign's success.



Let's stay in touch.

GPG Services

- Campaign Planning Assessment
- Campaign Consulting & Execution
- Major Gift Program Implementation
- Executive Solicitation Coaching



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