

The Major Gift Pipeline Across Generations

Bridging Annual and Major Donors Programs

Presented By:

Kate Senner & Johanna Kelly

Kate Senner

Director of Development and Major Gifts
Sarah P. Duke Gardens

Kate joined Sarah P. Duke Gardens in February 2016 as Director of Development and Major Gifts. In this role, she is responsible for the Annual Fund/Membership, Major Gifts and the \$30 million capital campaign. Prior to coming to Duke Gardens, Kate worked in Duke University's central development office as an Advancement Officer focusing on Major Gift Pipeline Development.

Johanna Kelly

Director of Development
Denver Botanic Garden

Johanna has been the chief fundraising officer since March 2010. With a dynamic team of 5 other individuals, Johanna works with the CEO and board on operating, restricted and capital gifts

Learner Outcomes

- Recruiting new annual fund & major gift prospects to broaden your pipeline pool
- Understanding the gift pipeline and how annual gifts can be transitioned to major gift relationships.
- The right framework and tools for the pipeline management process and common roles for staff, leadership and Board.
- Communicating effectively and building partnerships with key program leaders.
- Using mission-based enthusiasm to inspire more active fundraising engagement on the part of trustees, and,
- Putting it all together in a cohesive strategy and action plan to get the gift.

Millennial Generation

- Who are they:
 - Born early 1980s to mid 1990s / early 2000s
 - Also known as the “Me Generation”
 - Tend to be “civic-minded” with a strong sense of community both local and global
 - Known for being confident, tolerant, entitled and narcissist
- \$200 Billion in buying power
- More likely to give or volunteer if others are involved
- Uses multiple tech devices and is active on social media

Generation X

- Who are they:
 - Born early to mid 1960s to late 1970s/early 1980s
 - Smaller group that is often overlooked in philanthropy
 - Known for being independent, resourceful, self-managing, adaptable, cynical and pragmatic
- Work life balance is important
- Greatest entrepreneurial generation
- Volunteer rate is highest compared with other generations
- What to know their giving makes a difference

What does this mean for giving?

- They want to be engaged on social media
- They expect website and giving pages to be tech friendly
- They expect a clearly defined impact from the organization
- They expect to be asked and asked frequently

<http://www.forbes.com/sites/danschawbel/2015/01/20/10-new-findings-about-the-millennial-consumer/#2fa85ea128a8>

<http://info.jgacounsel.com/blog/gen-x-giving-effective-fundraising-strategies-for-gen-x-donors>

Demonstrated Impact

EASY STEPS TO A RESILIENT GARDEN • 2 Tuesdays, November 1 & 15

Jan Little, director of education and public programs, Duke Gardens

Plan next year's garden to be more resilient and sustainable. Looking at the garden through nature's lens we will assess your soil, water, drainage, land history and existing plants. After evaluating those conditions each participant will develop a sustainability strategy for their home garden.

CREATE A BIRD-FRIENDLY GARDEN • 2 Tuesdays, February 7 & 14

Lauri Lawson, Niche Gardens

Birds can bring color, life and song to your garden. Lauri will review plants that are favored by both local and migratory songbirds, as well as their other shelter needs. Then you will have the chance to create a plant list suitable for your garden conditions.

TUESDAYS, 6:30-9 PM
LOCATION: DORIS DUKE CENTER
PARTICIPANT LIMIT: 15

FEE PER SESSION: GARDENS MEMBERS \$48; GENERAL PUBLIC \$60.
FEE TO REGISTER FOR MULTIPLE SESSIONS \$43/\$54 PER SESSION.
Qualifies for Home Horticulture Certificate elective credit (5 hours each)

By joining the Mary D.B.T. Semans Society level, you would be supporting 50% of the cost toward this year's spring bulb planting!

4 TUESDAYS, FEB. 21-MARCH 14, 6-9 PM

PARTICIPANT LIMIT: 15

FEE: GARDENS MEMBERS \$120; GENERAL PUBLIC \$150

Qualifies as a Home Horticulture Certificate required course

CARING FOR YOUR LANDSCAPE

Suddenly the landscape is planted and you are faced with garden maintenance! In this class we will take you through the steps of establishing a new landscape, watering, plant staking and plants' nutritional needs. Then, we'll consider long-term maintenance tasks, including pruning, weed control, fertilizing and pest control.

3 SATURDAYS, FEB 18-MARCH 4, 9:30-11:30 AM
LOCATION: GREENHOUSE CLASSROOM

PARTICIPANT LIMIT: 15

FEE: GARDENS MEMBERS \$70; GENERAL PUBLIC \$90

Qualifies for Home Horticulture Certificate required course


Your support at the Pergola Society level would go towards one month of general care to the trees in Duke Gardens!

How the Gardens have grown

The Gardens now sit within a new university arts district that includes the Nasher Museum of Art and the new Duke Arts Center on Anderson Street. The resulting visitors and additional foot traffic to this arts hub will increase the visibility and importance of the Gardens' front door as a prominent portal to the university even more.

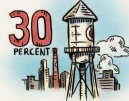
The dramatic growth of the last decade, coupled with the growth anticipated in the coming years, means that the Gardens must keep pace. The Gardens must improve its ability to welcome visitors and connect with students in this new environment.

Expansive horticultural upgrades are only one aspect that makes the Gardens a busier, more consequential place than many alumni and visitors remember. When the Doris Duke Center was built in 2001, it was intended to serve as a welcome center, administrative office, and principal event space of the Gardens. But because of budget constraints at the time, only half of the planned square footage was built. Since then:



Durham visitation increased by 65 percent, and the Gardens is its No. 1 attraction


Gardens staff increased 60 percent, including the first-ever full-time director


More than 4 million square feet of buildings were constructed on campus


The population of Durham grew by over 30 percent and is predicted to again by 2030


Gardens volunteers and program participants have doubled


University enrollment increased by 25 percent



"When I feel disembodied by ideas and abstract concepts, Duke Gardens is a place that brings me back to myself by celebrating the beauty of nature."

— Nikki Raye Rice (D'14)

You make it all possible.

More than 300,000 people each year enjoy Duke Gardens free of charge. Friends of Duke Gardens membership, which supports our Annual Fund, helps Duke Gardens continue to grow. Our inspired horticultural designs, our free community & family events and many more of our outstanding resources are funded by our Friends' continued Annual Fund contributions.

For example, by becoming a member at one of the Supporting Membership levels, your gift of:

- \$500 can provide a year's worth of bird feed for Duke Gardens.
- \$1,000 can support one month of general tree care in Duke Gardens.
- \$2,500 can fund one flower bed in the Terrace Gardens for two years.
- \$5,000 can support half of the cost of this year's spring bulb planting.

Become a Supporting Member today.
gifts.duke.edu/gardens-membership

"We are pleased to support Duke Gardens. We fell in love there as graduate students 50 years ago, and our love for the Gardens has only grown"

— Cary & Ann Gravatt (G'66 & G'66)

Appealing to “Me”

May 16, 2016

Dear Jodi and Robert,

Greetings from Duke Gardens! As you might have heard, we're growing by leaps and bounds here at the Gardens. In case you haven't been able to visit us recently, the new Pine Cloud Mountain Stream was just featured on the UNC-TV series *Our State* and in April, we opened the Welch Woodland Overlook in the Doris Duke Gardens. We also continue to look at ways we can better connect with the Duke community. For example, the Fisher Amphitheater is being used as an outdoor classroom and as a space for impromptu performances. Also, there is now Wi-Fi access throughout the Gardens. Much of this growth is made possible largely by our friends and supporters, like you, who give to the Duke Gardens Annual Fund.

As the end of our fiscal year approaches, I want to take this opportunity to thank you for your past support and encourage you to support the Duke Gardens Annual Fund again this year. **We hope that you consider supporting us again this year with a gift of \$150.00 as we continue to become an increasingly important part of the Duke experience.**

To continue your support of the Duke Gardens Annual Fund, please visit <http://gardens.duke.edu/support>



Everyone's doing it

Sarah P. Duke Gardens

Piedmont Prairie

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"We aspired to create a landscape design
homage to the vanishing Piedmont prairies that once flourished in the southeastern U.S.,
and...create a living classroom where the botanical legacy of this ecosystem could be passed on."

Stefan Bloodworth, Curator

[Duke Libraries](#) > [Support the Library](#) > [Naming Opportunities](#)

Naming Opportunities

Rubenstein Library (Floor 1)



Available Naming Opportunities

\$5,000 - \$100,000

Staff Meeting Room 1 (\$25,000)

Staff Meeting Room 2 (\$25,000)

\$100,000 - \$500,000

Papyrology & Paleography
(\$150,000)

Reference Room (\$200,000)

More than \$500,000

Photography Gallery (\$1,000,000)

Reading Room (\$2,000,000)

Named Spaces

Bradley and Pamela Korman Foyer

Doug and Elise Beckstett
Classroom

Faith Perlmutter Diamond
Consultation Room

Harry H. Harkins Seminar Room

Uleiti Anderson Family Assembly

90 Second Commercial

1. Context - Define the area of interest & describe its current success including relevant notable grads
2. Gap/Opportunity - Describe what is currently being left unaccomplished
3. Priorities - Describe what the institution is doing around the area of interest and why
4. Impacts - Describe what will change/result
5. Cool Kids - Share who is co-investing (at relevant giving levels) and if the institution has any skin in the game

Credit: PlusDelta Partners

Pulling it all together

NAME	CITY	STATE	GOAL	DATE OF LAST VISIT	WHO	GARDENS' STATUS	NEXT MOVE	DATE	WHO	GIVING
	Potomac	MD	Family Gift	3/4/2016	Kate Senner	Cultivation - lukewarm	Reach out to siblings and children	March 2017	Kate	
	Austin	TX	Increase AF giving/possible BOA member	6/20/2016	Kate Senner	Qualification	Call to connect	2/13/17	Kate or MGO	
	San Francisco	CA	Gift to Capital Campaign	2/4/2016	Bill LeFevre & Kate Senner	Closed CC Gift	Steward	4/21/17	Bill	

Major Gifts, Capital Campaign and Planned Gifts

Identify, cultivate, solicit, and steward prospects on behalf of Duke Gardens for capital campaign through research and face to face visits. Secure planned gifts to ensure the future of Duke Gardens.

- Maintain a spreadsheet of top 100 potential donors, their fundraising goals and status in pipeline
- Research prospects to discover inclination and capacity.
- Director and Director of Development travel regularly to cultivate, solicit and steward major gift donors and prospects.
- Execute campaign mailings and marketing
- Work with Central Development Officers and Gift Planning Officers to establish
 - Strategies for major gift & gift planning current donors
 - Planning small regional events to boost fundraising awareness among alumni
 - Brainstorm and execute campaign stewardship

July

- Update the AF ask amounts
- Email July eNewsletter
- Develop cultivation strategies for Board and Capital Campaign Committee members
- Update “top 100” spreadsheet
- Organize & prepare student impact students for social media
- Send EOY Thank You email
- Create & order thank you letters for annual fund, capital campaign commitments and capital campaign pledge payments
- Write First Appeal Letter, Prepare Appeal Letter List

Priority Cause By Generation*

<u>Cause</u>	<u>Gen Y</u>	<u>Gen X</u>	<u>Baby Boomers</u>	<u>Silent Gen</u>
Local Social Services	19%	29%	36%	37%
Place of Worship	22%	36%	38%	46%
Health Charities	20%	24%	19%	23%
Children's Charities	29%	28%	22%	20%
Education	17%	16%	14%	20%
Emergency Relief	11%	18%	11%	19%
Animal Rescue/Protection	16%	21%	18%	11%
Troops/Veterans	6%	10%	15%	22%
Environnemental	4%	10%	9%	9%
First Responders	6%	8%	10%	9%
Arts	4%	7%	6%	14%
Advocacy	6%	4%	5%	10%
Election Campaigns	2%	2%	2%	5%
Human Rights	12%	10%	4%	6%
Victims of Crime/Abuse	7%	6%	3%	4%

*Table from Blackbaud – August 2013

Giving Channels By Generation*

	<u>Gen Y</u>	<u>Gen X</u>	<u>Baby Boomers</u>	<u>Silent Gen</u>
Checkout Donations	52%	51%	53%	44%
Purchase of Proceeds	39%	42%	41%	36%
Online Donation	47%	40%	42%	27%
Pledge	22%	39%	39%	38%
Honor/Tribute	17%	24%	42%	42%
Mailed Check/Credit Card	10%	22%	40%	52%
Street Canvass	25%	29%	26%	19%
3rd-Party Vendor	29%	27%	16%	14%
Email	12%	12%	16%	17%
Phone	6%	7%	12%	19%
Door to Door	6%	9%	7%	9%
Mobile Text	15%	9%	5%	2%
Social Networking Site	8%	10%	5%	1%
Online Ad	8%	6%	4%	4%
Will/Planned Gift	4%	7%	4%	5%
Radio/TV	4%	4%	5%	7%
Stocks, Bonds, Prop	4%	0%	2%	2%

*Table from Blackbaud – August 2013

Sources

- **Generational Differences in Philanthropic Giving;** Bridget Hartnett, CPA, PSA and Ron Matan, CPA, CGMA, PSA *Fall 2015*, Sobel & Co., LLC
- **“Online Marketing Benchmark Study for Nonprofits.”** Dennis McCarthy, Chas Offutt, Andrew Shoaff, Bryan Snyder. May 2013. www.blackbaud.com
- **The Philanthropy Outlook 2017 & 2018;** Marts & Lundy, Researched by IUPUL, Lilly Family School of Philanthropy; www.philanthropyoutlook.com.
- **How Baby Boomers Will Change Philanthropy,**
<http://blogs.wsj.com/experts/2016/03/28/how-baby-boomers-will-change-philanthropy/>
- **Why Am I a Challenge for Charities?;** <http://www.nytimes.com/2013/01/12/booming/baby-boomers-and-charitable-donations.html>