S. Sutton & Associates Inc.
Consultants in Philanthropic Management

WE LEAD

Fundraising from High-Net-Worth Individuals: Tools and Strategies for Transformational Gifts

Based in Greece, WE LEAD is dedicated to empowering women through leadership and skill development, mentorship, job opportunities, and advocacy programs. WE LEAD focuses on fostering gender equality and supporting women's professional and personal growth in the tech and business sectors.

S. Sutton & Associates Inc. was enlisted to train key leaders from WE LEAD on fundraising from high-net-worth individuals: tools and strategies for transformational gifts.

Topics included:

Making the Case: Telling your Story from a Fundraising Point of View

- Who are you, how do you add value, how do you measure your impact and effectiveness?
- Why is your organization worthy of significant investment and how will a donor’s gift advance your mission?
- Why is this the time to make a gift?

Prospect Identification and Research

- Where to find high-net-worth (HNWI) prospects:
    - Primary: Existing donors are your best prospects. Screening your database
    - Secondary: networks, data tools, board connections, social circles
- Using research tools (e.g., iWave, Wealth Engine, Lexis-Nexis, DonorSearch)
- Wealth indicators and capacity vs. inclination
- Identifying aligned interests

Understanding the HNWI Mindset

- Philanthropic trends and motivations of HNWI
- How are HNWI different than other donors?
- Understanding what donors want to know about your organization when considering a major gift

   - Vision: do you have an attainable plan for the future?
   - Track record: how have you delivered in the past?
   - Financial stability
   - Strong, consistent leadership/confidence in leadership
   - Responsible use of funds (i.e., how much of the contributed $ goes to programs? Charity Navigator, etc.)

The Path to Solicitation: Cultivation and Relationship Building

- Building trust and credibility over time: what are the cultivation steps?
- The art of engaging HNWI in conversations that matter
- Involving donors/prospects in strategy or thought leadership (White Papers, CEO convenings, site visits, etc.)

The Ask

- Readiness checklist: timing, amount, case
- "Ask to ask"
- Planning a principal gift conversation (briefings and script), optimizing logistics (where to meet? Who should ask? What should be sent ahead?)
- Framing gift opportunities
- Navigating objections and concerns
- The proposition: structuring and writing a compelling proposal

Stewardship and Retention

- Personalized stewardship strategies: what does THIS donor care about?
- Non-ask touches/recognition, reporting, and long-term engagement
- Involving donors in impact
- Preparing for the next ask
- Turning buyers into sellers; can this donor help you reach others or advocate for your organization?