

Major Gift Discovery at Santa Clara University

Benchmarks, Best Practices and Tools

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Meet the team

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Director of Development (10 mos)

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Director of Development (10 mos)



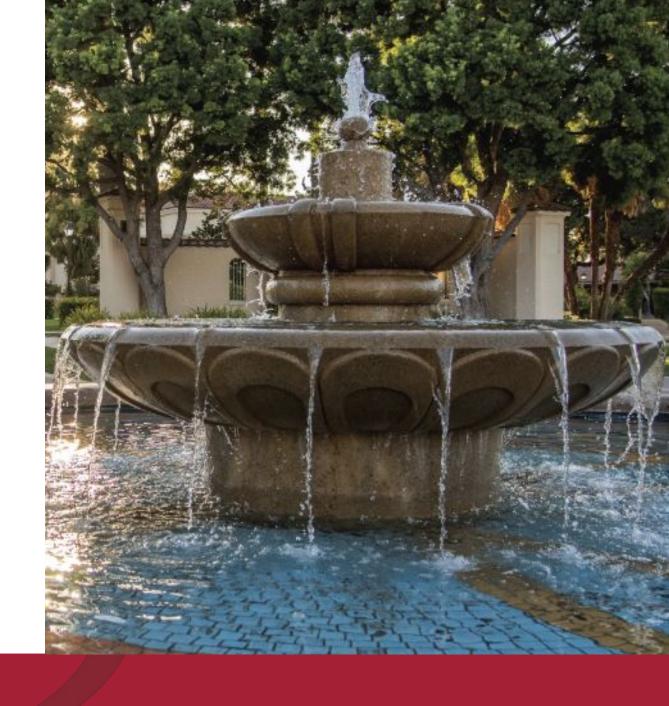






Agenda

- Polling and interaction
- Overview of our process
- Share our results
- Share our tools
- Concluding thoughts





Why this Presentation & How You Might Use It

Why?

- Last year's JAA most institutions in peri-campaign situations with portfolios of mostly discovery prospects.
- New hires provided an opportunity to benchmark and learn.

Questions to consider

- If I hire an new MGO, how long will it take for them to qualify 100 prospects?
- How many rated prospects do need for an MGO need to fill their portfolio?
- How long for a new MGO to produce 12-15 MG solicitations per year?



Who's Here Today?





Our Portfolios & Process

SCU in Pre-Campaign

- Finished a \$1B campaign Jan '24 all usual suspects have been tapped
- Ambitious leadership wants to launch next campaign
- 112,000 alumni, 174 yrs old school
- Need to look beyond usual suspects

Portfolio Composition

- 120 prospects in MGO portfolios, 100 in Manager MGO portfolios
- 45% are cold (defined as under \$1,000 lifetime and/or no giving in last 5 years)

About our data & process

- Prospect Research assigns directly (Capacity @ \$250k+)
- MGO's attempt qualification via multi-modal 10+ outreach attempts over 6-8 months



What's the Size & Temperature of Your Portfolio?

Size

- 100 or less
- 100-150
- 150 or more

Temperature

- Cold
- Warm
- Hot





Interaction Benchmarks

Moment of response - # of Outreach to get a response (MG specific)

- → Rule of Thumb 50% by 7th outreach
- → Actual experience mean: 3.6, mode: 2, median: 3

"At all" responsive: Avg: 55%

How many of responsive take a meeting? Avg: 46%

Meeting Type

• Face-to-face: Avg: 85%

• Virtual: Avg: 9%

• Phone: Avg: 6%



Releasing Prospects

Overall Released: 45%





Prospect Release & Disqualification Details

Disqualification Categories	Portfolio Averages			
No Response*	36%			
Responded & Released - No Meeting	41%			
Responded & Released - After Meeting	24%			

^{*} Non-responders are released after multi-modal, ~10+ attempts over 6-8 months



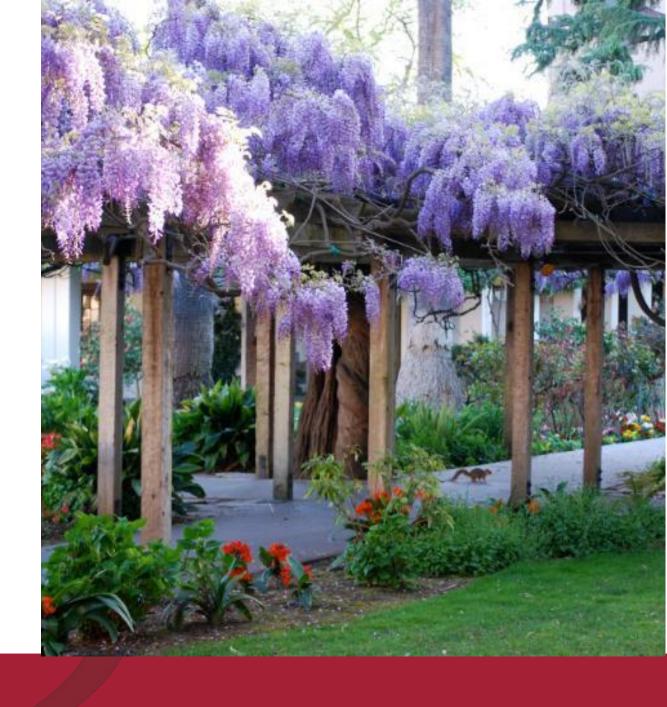
Donor Cycle or Moves

Donor Cycle	Portfolio Averages
In Discovery	78%
Moved to Cultivation	15%
Moved to Solicitation	2%
Moved to Stewardship	5%

^{*}All new assignments start in Discovery



Benchmark Questions





Tools: Cadences for Travel

	SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
Week 1			EMAIL 1				
Week 2				EMAIL 2			
Week 3		CALL & TEXT					
Week 4					EMAIL 3		
Week 5			TEXT				
Travel Week	TRAVEL	DONOR	VISITS	DONOR	VISITS	TRAVEL	



Tools: Outreach Progression (assertive, not aggressive)

- Letters Progressively more assertive in content
- Emails Match messaging from letter (or visa versa)
- Phone calls Start with cell, Don't be shy try all numbers, leave voicemails
 on theme of emails & letters (let them hear your voice, make it personal so
 they know you are not spam)
- Text messages Repeat themes from emails, letters and voice mails
- **LinkedIn** If you pay for Navigator, use in parallel with email. If not, with those who are active (limited to 5 per month & 200 characters)

Sample materials



Tools: Discovery Meeting Preparation

The Worksheet

- High-level info about prospects
- Top 3-5 things I *already* know
- Top 3-5 things I want to know
- Agenda / meeting plan phases
- Script / talking points

Successful Visit Outcomes

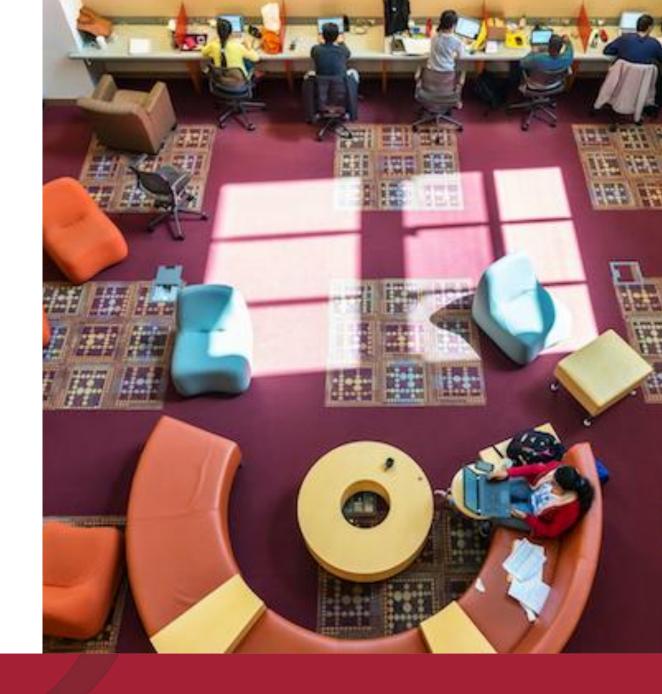
- Their WHY & meaningful type of impact
- Interest & aptitude
- Family deciders, constraints, opportunities
- Philanthropic priorities and where we rank
- Capacity: what level of support do they consider meaningful
- Estate plans

Discovery Meeting Worksheet (Agenda / Script)



Closing Thoughts

- We didn't code interactions to facilitate this analysis - it was a pain
- Be open to being surprised these results were not what we expected
- Major Gifts fundraising takes a lot of time, and stands on the shoulders of many





Your Questions?





Thank You & Connect with Us!

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