

# Major Gift Discovery at Santa Clara University

Benchmarks, Best Practices and Tools

Monday, July 21, 2025



# Meet the team

## **Jeremy Benjamin**

Executive Director of Development (1.5 yrs)



## **Sasha Keller**

Director of Development (10 mos)



## **Scott Kleinheksel**

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!

## Jeremy Benjamin

jbenjamin5@scu.edu

[linkedin.com/in/jeremybenjamin](https://www.linkedin.com/in/jeremybenjamin)

## Sasha Keller

skeller@scu.edu

[linkedin.com/in/1-sasha-ann-keller](https://www.linkedin.com/in/1-sasha-ann-keller)

## Scott Kleinheksel

skleinheksel@scu.edu

[linkedin.com/in/scottkleinheksel](https://www.linkedin.com/in/scottkleinheksel)

