

INTERNATIONAL
FUNDR  **ISING**
CONFERENCE SAN FRANCISCO, CA
APRIL 30 - MAY 2, 2017

**Moving Annual and Mid-Level Donors towards Inspired Gifts:
A Case Study from the Oregon Health and Science University Foundation**

Qualification Email Samples

Subject: OHSU Invitation
Hello Juliet,

Thank you for your past support of OHSU, and your participation in OHSU events and fundraising efforts. I am pleased to share that **since your gift in 2010**, OHSU has successfully completed the Knight Cancer Challenge, broken ground on the Rood Family Pavilion, a guest house for patients and families, and developed a promising vaccine for HIV and AIDS that is currently in phase 1 of clinical trials – all **thanks** to friends like you!

I would love the **opportunity to take you to** breakfast, lunch, happy hour or coffee per your schedule, to introduce myself in-person, learn more about you and your connection with OHSU, **share with you information regarding our ONWARD campaign**, and get your feedback as a local business leader and Pacific Northwest native.

Do you have any availability on Monday, August 8th, Wednesday, August 10th, or Friday, August 12th? **Please let me know what works best for you and I will arrange accordingly.**

Here is a short video to give you a sense of ONWARD: ONWARD VIDEO

Thank you,
Chelsea Benedict

INTERNATIONAL
FUNDR**ISING**
CONFERENCE SAN FRANCISCO, CA
APRIL 30 - MAY 2, 2017

Subject: OHSU Foundation Invitation

Dear Mrs. Schade,

I am writing you from Oregon Health and Science University and Doernbecher Foundations to ask if you might be willing to let me take you to lunch to share information regarding our *ONWARD* campaign. As a **business leader in Oregon (philanthropic leader in our community)**, I would love to **get your advice and feedback on our campaign.**

Would you be available to visit over coffee or lunch on either Date 1 or Date 2? I would also be happy to meet you at your office if that would be more convenient for you.

I appreciate your support and look forward to meeting you.

Thank you,
Chelsea Benedict

INTERNATIONAL
FUNDR**ISING**
CONFERENCE **SAN FRANCISCO, CA**
APRIL 30 - MAY 2, 2017

Visit Briefing Template

Meeting or Activity	
Date/Time	
Location	
Participants	
Purpose of Meeting	
Desired Outcomes	
Key Questions and Talking Points	
Donor Background	

INTERNATIONAL
FUNDR**ISING**
 CONFERENCE SAN FRANCISCO, CA
 APRIL 30 - MAY 2, 2017

Transformational Engagement Opportunity Example

Event Type	Discovery Lunch	What would work at your organization?
Size	12-15 guests	
Format & Flow	<ul style="list-style-type: none"> • Welcome & roundtable introductions of guests and internal staff (10 minutes) • Informal conversation over lunch Provides speaker time to eat and visit with guests. (20 minutes) • Presentation/mission updates by featured speaker (15 minutes) • Time for questions & event wrap-up (15 minutes) • Optional tour of key space related to discovery lunch topic - e.g., lab tour (15-20 minutes) 	
Outcomes	<ul style="list-style-type: none"> • Donors that are inspired and better understand the power of philanthropy at your organization. 	

INTERNATIONAL
FUNDR  **ISING**
CONFERENCE **SAN FRANCISCO, CA**
APRIL 30 - MAY 2, 2017

Proposal Template Example



Lorem ipsum dolor sit amet, consectetur adipiscing elit. Morbi eget ipsum lorem. Maecenas tincidunt dignissim urna sit amet bibendum. Class aptent taciti sociosqu ad litora torquent per conubia nostra, per inceptos himenaeos. Vestibulum ante ipsum primis in faucibus orci luctus et ultrices posuere cubilia

Maecenas vitae dapibus nibh, et vulputate sem. Phasellus laoreet aliquet neque id dictum. In vel erat vitae mi feugiat tempus. Mauris id tincidunt nulla, sed egestas nibh. Nulla in tortor finibus, consequat lectus non, hendrerit augue. Maecenas lectus ex, cursus id nibh sed, hendrerit vestibulum nisi. Quisque malesuada eleifend velit at laoreet. Proin placerat, libero sed interdum faucibus, turpis eros facilisis nisi, quis sodales lorem nibh non massa. Aliquam erat volutpat.

"This is a very compelling quote that will move donors to give to this cause."

- Name
Title

Subhead here

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aenean et lectus purus. Nam fermentum, nunc eget vehicula interdum, tortor felis pulvinar dolor, sit amet feugiat orci

nulla id est. Proin volutpat, dolor eget tincidunt dictum, turpis tellus vulputate felis, et sodales elit elit a lectus. Maecenas vitae dapibus nibh, et vulputate sem. Phasellus laoreet aliquet neque id dictum. In vel erat vitae mi feugiat tempus. Mauris id tincidunt nulla, sed egestas nibh. Nulla in tortor finibus, consequat lectus non, hendrerit augue.

Subhead here

In hac habitasse platea dictumst. Curabitur nec fringilla nisl. Suspendisse sed ante sem. Maecenas augue orci, aliquet eget neque eu, suscipit sollicitudin est. Fusce cursus diam mauris, quis dictum magna convallis a. Nunc commodo purus non enim iaculis pretium. Praesent ante est, tincidunt a molestie vitae, consequat a felis. Vestibulum hendrerit dolor et magna facilisis, non pharetra elit tempor.

Subhead here

- Aliquam venenatis risus a mauris pretium, eu rhoncus magna pulvinar.
- Aliquam venenatis risus a mauris pretium, eu rhoncus magna pulvinar.
- And so forth.

INTERNATIONAL
FUNDR  **ISING**
 CONFERENCE SAN FRANCISCO, CA
 APRIL 30 - MAY 2, 2017

Keys to Success Summary

Development Activity	Keys to Success	What can you implement with your pipeline/at your organization?
Prospecting & Qualifications	<ul style="list-style-type: none"> • Think outside the database • Differentiate approach for your donors vs. aspirational prospects • Cast a wide net & be persistent • Get creative with your initial outreach • Celebrate every interaction, even the disqualifications! 	
Cultivating towards inspired giving	<ul style="list-style-type: none"> • Before first visit, identify desired outcomes and then identify the right questions • Collaborate with internal partners to develop your cultivation strategy • Engage donors through transformational engagement events and inspiring collateral 	
Making the Ask	<ul style="list-style-type: none"> • Work with your partners and donor to dream big • Work with your communication colleagues develop proposal templates • Provide tiered giving options 	