## The Veritus Way



Our philosophical approach, with the last half of the major gift and planned giving pipeline, is for the fundraiser to focus on fulfilling the passions and interests of qualified caseload donors by building authentic relationships with those donors. The objective to building those relationships is to understand and serve a donor's passion and interests by matching those passions and interests to the organization's projects and programs. If this is successfully accomplished, the result will be a significant investment by the donor if that donor has the ability to do it.

## Our practical approach that allows this to happen, is the following:



We start with analyzing the organization's data, which allows us to understand donor behavior, value attrition rates, overall trends, and areas of opportunity.



This enables us to create a five-year revenue forecast.



From that analysis we create a caseload pool of donors that will be used by the major gift fundraiser to qualify a donor into a major gift portfolio.



We then work through a qualifying process until we know without a doubt a donor wants a deeper and more meaningful relationship with the organization.



Once a donor is qualified, we tier those donors A-through-C to help the major gift fundraiser properly focus their time.



As donors are qualified, passions and interests and communication preferences of the donor are identified.



Following qualification, a revenue goal based on the donor's history of giving and capacity is assigned to each donor in the portfolio. Once the goal is established that goal is cash-flowed over the next 12 months.



Concurrent with goal setting, a strategic plan, driven by the donor's passions and interests and communication preferences, is created for each donor so that there is a roadmap for the major gift officer on how they will achieve the goal.



A weekly management meeting is scheduled with the major gift fundraiser in order to help keep the major gift fundraiser focused and accountable to their plan.



The major gift officer is evaluated with emphasis on meeting revenue goals by donor, creating meaningful connections and specifically reviewing if they worked their strategic plan for each donor.

**This is the Veritus Way.** It honors the donor by gaining their trust through the building of a relationship so that the fundraiser truly understands how the donor wants to change the world (passion and interests, identification) through the mission of their organization. And, it honors the fundraiser by giving them a structure from which to work that allows them the freedom and time to actually build those authentic relationships. The result is net revenue growth that allows the organization to grow and carry out its mission.

