



Photo W O'Leary | Sunrise over the Bridgers

What we do

IF YOUR ORGANIZATION is interested in having us consult with you here is a brief description of how we do things. We don't have an off-the-shelf, one-size-fits-all, program for you. We start working on a proposal after we've had a chance to talk with you a few times. Every organization doesn't want the same thing and every organization isn't in the same place. So we start where you are now. Most of the folks we talk with do not at present have a major and planned gifts program in place. Most are living on earned income, special events, grants and a bit of annual fund. A few have done some major gifts work.

After we've gathered a bit of information we ask to be invited to prepare an Engagement document. It takes time to prepare these and we don't want to do it unless the prospective client seriously wants to contemplate the possibility of working with us. This document introduces our group, briefly describes the major and planned gift development sub-specialty and then goes into a "problem statement" containing a bit of organizational history and the challenges that make the charity want to consider our services. There's more, of course. Each one of these is about 10 pages long. We also write a one or two page executive summary.

This becomes a discussion document. Most of our clients find it useful as a tool to educate their staffs and engage their boards. We're not just *selling ourselves*, we're also *selling* the idea of getting into the whole major gifts development universe. Do you want to know more? Contact us by clicking [HERE](#) or e-mail at patrick@majorgiftsmt.com