



AREA AGENCY ON AGING OF PASCO-PINELLAS, INC.

POLICY: MAJOR GIFTS PLAN

DEPARTMENT: DEVELOPMENT

DATE DEVELOPED: 03/02/2026

PROGRAM: FUNDING

DATE APPROVED: 08/17/2026

PURPOSE:

To develop a Major gifts pipeline which will move away from events-only fundraising and will go to support direct programming for AAAPP.

Major Gift Criteria:

- **\$2,500+ Annually**
 - o Represents meaningful impact
 - o Requires Personal Cultivation
 - o Is currently attainable within Donor Base

Year one Priorities:

- Identify 5 major gift prospects
- Personally meet with 3
- Secure 5-8 gifts of \$1,000+
- Upgrade 3-5 Donors

Target Audience:

Individual

Focus: Connection before Capacity

Corporate

Focus: Alignment & local presence

- Anyone who has given \$500+ cumulatively	- Anyone who has given \$500+ cumulatively
- Loyal Donors (3+ consecutive years)	- Loyal Donors (3+ consecutive years)
- Event Attendees who give beyond a ticket price (i.e. moment of giving)	- Event Sponsors (past and present)
- Board Members & Former Board Members	- Organizations/businesses with existing Board members connection
- Individuals who consistently respond to appeals	- Businesses or corporations serving seniors in Pasco & Pinellas
- Volunteers for the Agency	



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Board Engagement Strategy:

- Consider including AAAPP in personal giving
- Assist with identifying 3-6 prospects annually
- Support introduction to potential sponsors/donors
- Participate in stewardship – handwritten notes from board members for first time donors
- Serve as relationship managers if applicable
- Host small gatherings
- Join donor meetings
- Share impact stories on LinkedIn and Facebook

Goal: 100% board engagement in some form.

Relationship Managers:

- Each prospect should have an assigned relationship manager (ED, Director Strategic Advancement or Board member)
- Clear next step assigned
- Notes/communications tracked in CRM

Cultivation Approach & Activities:

Individuals

Grow established relationships, build trust,
Make a personalized and meaningful ask

Corporate

Align business goals, present opportunity,
deliver value

- 1:1 coffee or lunch	- Formal Sponsorship Packets
- Personal impact reports	- Clear tiered opportunities
- Calls from ED	- Calls from ED
- Handwritten notes	- Event Based entry points (luncheons, volunteer opportunities, smaller events)
- Invitations to volunteer events/mission in action	- Impact reports



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- Invitations to small, Mission-focused events (i.e. Day in the life 2025)	- Digital recognition opportunities (i.e. Check presentations, program or major sponsor recognition on social media, etc.)
- Naming opportunities for Capital Projects	- Naming opportunities for Capital Projects

Moves Management:

Key factors to document:

- Program(s) of interest
- Estimated capacity (use Bloomerang wealth screening tool)
- Latest Gift
- Next action
- Ask amt.
- Target date
- Case for support –
 - o Need more impact numbers on what dollar amounts each program can support. Unit + admin costs per program would be helpful for these.
 - o What does \$2,000, \$5,000 or \$10,000 accomplish?

Example: \$5,000 funds Project heartfelt for a year providing outreach to seniors through volunteer connection OR \$10,000 underwrites one full hurricane preparedness event to assist 100 seniors with curated kits ahead of hurricane season.

- Birthdays or notable celebrations/anniversaries
- For Corporate partners – Fiscal year planning timeline (allows for upgraded asks to be included in the budget for the year).

Stewardship:

Individuals:

Showing impact, gratitude and connection to something greater.

Corporate Sponsors:

Build community goodwill, engagement, marketing and exposure.



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- Thank you note within 48 hours	- Thank you note within 48 hours
- Call from ED	- Call from ED
- First time donors to receive a copy of previous year's Annual Report	- 90-day impact report for program designation
- 90-day impact report for program designation	- Digital Recognition – Check presentations, newsletter references, social media highlight, website (logo/link)
- Invitation to small gathering (i.e. Estate planning 101 event or similar style event – day in the life etc.)	- Invitations to board/Advisory Council meetings
- Year-end Impact Story	