Launching a Fundraising Program:
From A to Z

Thursday, August 30, 2018
2:00 pm – 3:15 pm
3:30 pm – 4:45 pm

Presented by:
Kate D. Atkins, MS, Client Development Advisor
Launching a Fundraising Program: From A to Z

Trainer: Kate D. Atkins, MS, Client Development Advisor

Materials/Disclaimer

Please note that these materials are incomplete without the accompanying oral comments by the trainer(s).

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Introductions

“All federally funded agencies should be aware that although fundraising can be allowable with prior approval, you should pay for fundraising with non-federal funds (unless you have that prior approval).”

Denes Tobie, CPA, Partner
Tammy Jelinek, MBA, Partner

Objectives

1. Clarify what it means to fundraise and be a fundraiser
2. Establish a development strategy including a development process and communication plan to maximize your ROI
3. Gain confidence in asking for money
Agenda

1. How to start
   A. Fundamentals
   B. Funding fundraising
   C. Board/Staff/Volunteer culture
2. What is Fundraising/the Fundraising Cycle
   A. Identify
   B. Research
   C. Cultivation
   D. Solicitation
   E. Stewardship
3. Plan development
Fundamentals

- What is your mission statement?
- What is your vision statement?
- Do those statements resonate with the community or do they need work?
- What values do staff and volunteers in your organization share?
- Have you conducted a community needs assessment and a SWOT (Strengths, Weaknesses, Opportunities, Threats) analysis?
- Do the strengths you see internally match the strengths the community sees?
- Are you providing the right services to your community?
- Do your communications relate to what your community assessment is telling you?
- Does the board understand its roles and responsibilities, especially relating to Fund Development?
- Is your strategic plan current?
  - Do you refer to it often?
  - Is it a living document or is it gathering dust?
  - Is fundraising a part of your strategic plan?

Funding the Program

- Board gives a personal donation to begin funding the fundraising program
- Reach out to area restaurants and businesses for donations – they can hold a fundraiser for you
- Ask people
- Donate Now button
- Website
- Softgiving (Round Up)
Board Readiness

- When talking about this organization, do you use words like “we,” “us,” and “our” versus “you” and “your”?
- Why were you recruited to serve on this board?
- How do you help this organization fundraise?
- Do you donate money to this organization?
- Do you donate money to other organizations? Where does this organization fit in your priorities for charitable giving?
- Do you talk about this organization with coworkers, friends, and family?
- Write down your favorite client story that happened at this organization.
- Do you know the names of five donors? Have you met those five donors?
- How many donors have you thanked with a card or phone call?
- How many donors have you introduced to the organization?

Culture

- Take charge of this culture change—be the change you want to see!
- Integrate a short fund development-oriented training or activity into every staff and board meeting.
- Ask a program staff member his or her advice on an appeal letter or for posts on Facebook, LinkedIn, Instagram, etc.
- Send staff to fundraising training! Don’t forget your program staff!
- Post thank-yous from clients and donors on a bulletin board.
- Schedule times when staff, donors, clients, and the board can stop in and make some thank-you calls or sign thank-you cards.
- Share client and donor stories at meetings, or have a bulletin board or page on your website.
- Invite donors into your organization.
- Review all of your communications. Make sure donors and prospective donors realize how they can change the world.
- Include being donor-focused in your job descriptions and evaluations.
Culture

What is fundraising? The fundraising cycle
You are a Dream Catcher

They are accomplishing their philanthropic missions through you.

They have a dream for the world and you are the conduit they are using to fulfill that dream.
You are a Dream Catcher
Fundraising Cycle

- Identification
- Stewardship
- Research
- Solicitation
- Cultivation

Assets

- What do you do better than anyone else in town?
- What do staff, volunteers and the community get excited about?
Identification

Identify the Predisposed

- Those who seem to have interests similar to some element of your organization’s mission
- Individuals, businesses that have demonstrated interests and actions that suggest a possible inclination toward your organization’s mission

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<th>Characteristics</th>
<th>What Types of People are Drawn to Your Cause?</th>
<th>Where Can You Find These People?</th>
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<td>Friends of Board, Staff or Volunteers</td>
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<td>Connected to Other Similar NPOs</td>
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**Identification**

- Inclination
- Capacity

**Research**

- Identification
- Stewardship
- Solicitation
- Cultivation
- Research

Launching a Fundraising Program: From A to Z
Research

The goal of research is not to snoop. We're only going to look at publicly available information, but it can still feel intrusive.

*Your integrity is always worth more than the biggest donation a person might give. Always.*

- Your own database
- Whitepages.com
- Google
- WealthEngine.com or DonorSearch.net
- NOZASearch.com
- Zillow
- Guidestar.org
- FaceBook
- LinkedIn
Research

Understand the predisposed

- Understand their interests and disinterests, emotions, and their motivations and aspirations

Uncover your Shared Values

- What are the shared interests between the donors or prospects and your organization?
- Be aware of disconnects

Where do the values match?

Where is the biggest disconnect?
Cultivation

Get to know the predisposed

• Make them a prospect or move on!
  – Do NOT spend your limited resources (both human and financial) to try to make others interested

• Make some form of an offer
  – Make them “raise their hand”

• After they raise their hand, they are a prospect
  – Volunteer time
  – Advice
  – Connection to a neighborhood or group
  – Financial investment
Cultivation

- In THEIR terms and according to THEIR definition
- Giving time or money is one of the most personal acts in any society

Cultivation

- Relationships vs. Transactions
- Do your donors feel like ATMs? Do you stop by regularly to withdraw some money?
- People don’t buy products or services, they buy the bond between customer and organization
- Long-term
- Pursue relationships with no motives but to have them
- Build bridges before you need them
Cultivation

Don’t Forget Your Volunteers
Myth: People give their time when they don’t have the money

- Track volunteers like you track donors
- Ask them for advice
- Keep them informed – They are your voice and passion in the community!

Solicitation

Identification
Stewardship
Research
Solicitation
Cultivation
Solicitation

Introduction to the organization ➔ Engagement with the organization ➔ Ask

Have You Laid the Groundwork?

*If you want advice, ask for money.*

*If you want money, ask for advice.*
Solicitation

Be prepared to share…
- Impact, risks, returns
- Gift investment policies
- Naming and recognition opportunities
- Stewardship policies
- Who is running the place
- Who else has invested
- Your story and outcomes

“Thank you for being such a strong supporter of our community!”
Solicitation

Ask Questions

Solicitation

[Image of a person jumping over a gap]
Solicitation

Ask Already!!!

• “Would you consider a gift of $X?”

• “Honestly, I have no idea how much to ask for, but is a gift of $X something you’d be able to consider?”
The Process

Objections

The Process

How did you come up with that amount?
The Process

How did you come up with that amount?

• "Well, we were looking at your stock holdings and the sale of your last business so $200,000 seemed reasonable"

NO

The Process

How did you come up with that amount?

• “Well, the entire project is $4 million. To reach that, we need three leaders at the $200,000 level. You seemed like a great fit.”

YES
## The Process

**Objections**
- *The gift level is too high.*

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<th>Restate in a positive manner</th>
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<td>• Yes, this is a large investment.</td>
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<td>– What level is comfortable?</td>
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<td>– What are your dreams for this donation?</td>
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**Objections**
- *I need to consult with my partner before making a decision.*

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<td>• Yes, it is very important to have everyone impacted by this donation as part of the process.</td>
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<td>– Let’s set up a meeting with everyone to discuss your dreams for this donation.</td>
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</table>
The Process

Objections

• I’m interested in naming the new wing, but I can only give $1 million, not $2 million.

Restate in a positive manner

• Yes, let’s talk about what you would really like to do.
  – What are your dreams for this donation?
Fundraising is the right person asking the right prospect for the right amount for the right project at the right time in the right way.

- Stanley Weinstein
End/Start the Cycle

Now that you made the ask…
- Thank! And continue nurturing the relationship
- Gratitude no matter the outcome
- Debrief – learn learn learn

Solicitation

1. Joy
2. Speed is of the essence
3. Personalize
4. Reference the amount
5. Reference what the gift was toward
6. Acknowledge past giving
7. Tax deductible language
8. P.S. Drive them to something new
9. Provide a contact person
10. Generally, don’t ask for another gift

-Pamela Grow, The Grow Report
Development Plan

Why Do We Need a Plan?

- Roadmap for the year
- Tells us where to focus (time, $, resources)
- Proactive not reactive, not in crisis mode
- Office work flow
- Board’s fundraising “idea of the month”
- You will raise more money
### Gather the Data

Gathering data for fundraising activities, current year-to-date figures, and projections for the coming year:

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<th>SOURCE</th>
<th>LAST YEAR'S INCOME</th>
<th>LAST YEAR'S EXPENSE</th>
<th>CURRENT YEAR'S INCOME</th>
<th>CURRENT YEAR'S EXPENSE</th>
<th>NEXT YEAR'S INCOME</th>
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### Set Goals

Setting goals for fundraising activities, focusing on raising specific targets for income and expenses.
Set Goals

- Number of dollars to raise
- Number of current donors to renew
- Number of donors you want to upgrade
- Number of new donors to acquire

Strategic Goals: Non-monetary
- Purchase database
- Improve our database to get better reports
- Start a newsletter
- Increase board participation
- Start a monthly giving program
- Improve email open rates
- Gather more email addresses
Put it on the calendar

Sample Communications Plan for January 2019

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<tr>
<th>Message</th>
<th>Call to Action</th>
<th>Face-to-Face</th>
<th>Print</th>
<th>Email</th>
<th>Facebook</th>
<th>Twitter</th>
<th>Press Release</th>
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Put it on the calendar

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Strategies & Tactics

Strategies

1. Goal #1
   • Strategy #1 Description
     1. Target audience
     2. Who is on my team
     3. Steps with assigned roles
     4. Deadlines
     5. Cost
        ✓ Projected Income (gross)
        ✓ Total cost (staff time, consulting services, design, printing postage, etc.)
        ✓ Net income
     6. Outcome
   • Strategy #2 Description
Stewardship

Individual donor strategic plan – Get out your calendar

- Write in all the mass communication pieces throughout the year
- At least quarterly send “you made a difference” pieces to each donor
- Twice a year report on specific programs your donors are funding with a report from the field
- Event invites to see your programs in action
- Bi-yearly thank you calls
- Bi-yearly “I know you” communications
- Cultivation face-to-face visits

Assess
Outcomes/Assessment

Objective #1: Email to Volunteers for Open House

- What outcome is needed to say this communication was a success?
  
  Volunteer needs are met and volunteers attend the event

- Did it work?
  
  Sort of. Our volunteer needs were nearly met, but not many new volunteers attended the event.

- What do we need to adjust?
  
  Put more emphasis on reminding them they are our best ambassadors. We need them there to tell our stories!

  Personally call our volunteers who are our best ambassadors.
EVALUATIONS

The Partnership Wants Your Feedback!

Please be sure to complete the evaluation for this session online, via the CAPCON18 Event App.

Thanks in Advance for your Cooperation!