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Welcome!

**The INS Group in partnership with
The CAPLAW presents**

The Board and Fundraising

Thursday, June 20, 2019

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Session Objectives

At the end of this workshop, participants will be able to:

- identify the most effective “best practices” that ensure greater fundraising success.
- identify specific strategies to increase board participation in fundraising.
- identify ongoing techniques to overcome fundraising fears.
- understand the critical steps in making “an ask.”
- apply fundraising strategies based on *new* resource development trends relevant to their own organization.

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Resource Development – the Big Picture

- Resources are everywhere. How you identify and use them is what makes the difference.
- Successful resource development does not necessarily require doing more but being more **strategic, thoughtful** and **deliberate**.

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Resource Development Planning

Effective resource development is a result of:

- Planning, Planning and more Planning
- Relationship building - partnerships with funders
 - Share the mission and activities of your organization with the community at-large through your organization's website and the media
 - Conversations with friends, family members and colleagues

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Question

Based on **Giving USA 2018* Contribution Reports**, which answer below shows the correct order of highest to lowest percentages of contributors?

A. Corporations
Bequests
Individuals
Foundations

B. Individuals
Foundations
Bequests
Corporations

C. Foundations
Corporations
Individuals
Bequests



The Big Picture – Some Trends

Pay attention to who's giving, demographic transitions, etc. – and relevance for the philanthropic landscape

- Younger generation
- Women
 - 40% of women with children under 18 are primary breadwinners in households
- People of color
 - 400 funds with annual contributions of \$400 million organized by African Americans, Hispanics, and other people of color

Short- and long-term benefits from identifying donors and building relationships with them



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Sample Strategy – Collective Giving

- **Giving Circles and other approaches**
 - Members pool their **time**, **talent** and **treasure** and collectively decide what to support
 - Often organized around a particular issue or area of interest
 - Goals include maximizing impact of charitable contributions and partnering with others who share values and priorities
- **Crowdsourcing and other approaches**
- **Collective giving can be one time or ongoing**



Successful Practices – Multi-pronged

Implement a multi-pronged approach including:

- Short-term strategies (one-time fundraising events)
- Long-term strategies (planned giving)
- Diverse strategies (e.g., foundation, corporate, individual, online)
- Other (e.g., unique opportunities)



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Successful Practices – Inform your donors

- Donors of all types increasingly demand information about what you are working to achieve and how you will know if you succeed.

- Motivate donors with multiple types of data.
 - Number of people served
 - Type and quality of services provided, etc.
 - Motivate donors with emotion – use “*emotional selling*”
 - *John P. moved from homelessness to homeowner.*

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Successful Practices – Build organizational capacity

- Funders are increasingly interested in organizations that leverage resources, collaborate with other groups, and build their organizational capacities.
- Funders are increasingly interested in funding successful model programs that can be replicated.
- Nonprofits will become more adept at using digital communications technologies and creatively inform donors about the impact achieved.
- Management of your donor base is critical to donor acquisition, retention and upgrading.

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Successful Practices – Target and Balance

- Carefully target messages to different donor segments.
- Balance and combine different forms of communication for different purposes (e.g., email, snail mail, and social media).

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Board Engagement

Boards are critical for resource development success

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Resource Development Planning

- Board members must be engaged in the strategic fund development planning process
- A board's involvement in planning builds ownership of the fundraising plan.
- After goals, objectives, programs and services have been determined, financial needs are determined by the board and staff and a budget is created.
- Fundraising efforts are strengthened when a true partnership between board and staff has been established.
- A good fundraising plan is explicit about both board and staff responsibilities.

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Resource Development Plan

- Community Needs
 - Identifies current trends
 - Forecasts community issues and concerns over the next 3-5 years that fit within the organization's industry

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Resource Development Plan

- Mission Statement/Organizational Purpose
 - Justifies the purpose of the organization's existence
 - Articulates which community issues and concerns it addresses and fulfills
 - Distinguishes the organization from others in the same field and answers the question: What would happen if our organization did not exist?
- Funding Needs
 - Describes the organization's current, near term and long term funding requirements for special projects, programs, and physical plant expansion



Resource Development Plan

- Case Statement
 - Describes the organization's distinctive merit and needs for seeking private contributed support
 - Articulates the most compelling reasons why someone should contribute
- Constituency of Contributors
 - Identifies individuals, foundations, businesses and charitable associations as potential donors to the organization
 - Evaluates their contribution potential assesses the best approach to solicit them



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Resource Development Plan

- Fund Raising Methodology
 - Determines the most cost-effective and result-oriented approach for the solicitation contributions
 - (face-to-face solicitation, special events, grant writing, direct mail, social venture, etc.)
- Organization and Leadership
 - Assesses the specific roles and responsibilities for the governing board based upon the established volunteer leadership requirements, with particular emphasis on fund raising duties

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Resource Development Plan

- Donor and Volunteer Recognition
 - Determines the most appropriate methods to acknowledge and recognize the organization's donors and volunteers.
- Administrative Systems and Procedures
 - Establishes the most efficient procedures for the receipt, acknowledgement, recording and reporting of contributions and pledges to the organization

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Resource Development Plan

- Professional Staff
 - Identifies and provides the necessary professional staff time and experience necessary to meet the organization's fund raising goals and expectations

- Fund Raising Materials
 - Proposals, annual reports, brochures, videos and pledge forms



Resource Development Plan

- Time Line
 - Establishes a realistic timeline to achieve specific goals and objectives.

- Be sure to evaluate the potential of each fundraising strategy.



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Resource Development Capacity

- **Who's responsible?**
 - Staff (permanent and contract)
 - Board
 - Volunteers
- **What tools do you have?**
 - Technology
 - Timing
 - Talent

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The Board and Strategic Resource Development

- Set fundraising targets
- Monitor fundraising outputs and achievements
- Offer guidance on priorities
- Leverage connections to raise money for the organization
- The give-or-get policy (give and get)
- The make-up of your board

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The Board and Strategic Resource Development

Check list for board members:

- ✓ Understand plans/programs for fundraising
- ✓ Understand why someone should contribute
- ✓ Contribute fullest measure of means
- ✓ Offer additions to mailing list
- ✓ Assist with identifying/evaluating prospects
- ✓ Cultivate key prospects
- ✓ Make introductions
- ✓ Write follow-up and acknowledgements
- ✓ Write personal notes on appeals
- ✓ Make face-to-face solicitations

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The Board Strategic Resource Development

Training board members:

- Dispel myths
- Develop presentation
- Role play/practice
- Create environments to build relationships
- Establish a buddy system
- Make brochures/materials available

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The Board and Resource Development Leadership

- Develops policies and procedures
- Ensures strong case for support
- Develops plans/procedures for board fundraising
- Helps develop strategies for involvement/cultivation of major gifts
- Keeps track of environmental factors affecting fundraising
- Evaluates prospects' increased levels of giving

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The Board and Resource Development Leadership Board Resource Development Committee

- Consider including board and non-board members
- May take lead on developing the Fund Development Plan (especially when no development staff)
- Annual goal should be broken down into quarterly goals and specific methodology for securing funds
- Indicate what board members and staff are expected to do
- Should make monthly or quarterly reports

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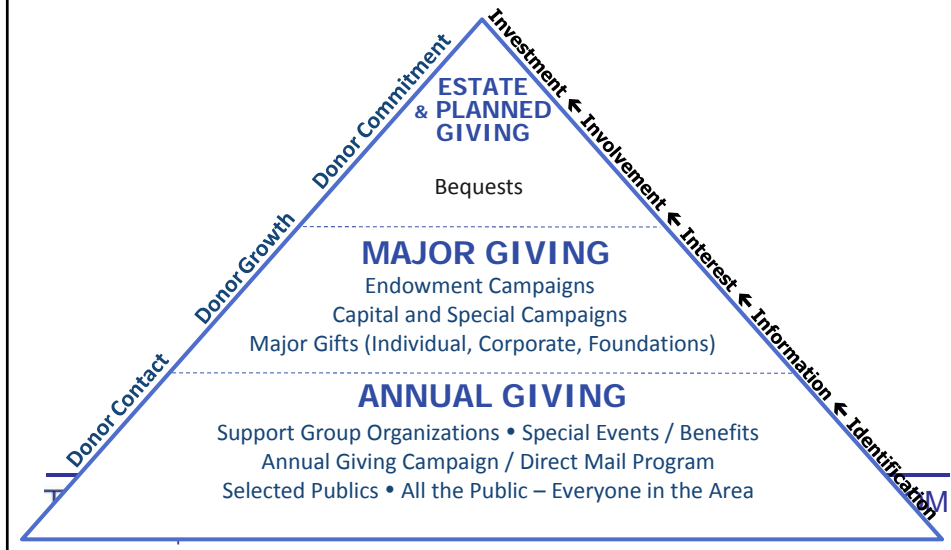
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The Pyramid of Giving

Source: Annual Giving The Building Block for All Successful Fundraising Presented by R. Scott Fortnum, MA, ACFRE



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Sample Strategy - Networking

Networking is a component of many resource development strategies and a strategy on its own.



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Communication Strategies

- Know your audience
- Have a clear call to action – clear message/pitch (the grocery line and elevator scenarios)
- Connect with your target audiences emotionally
- Talk about solutions to needs (give hope)
- Be consistent with your language (taglines, position statement, talking points, elevator pitch)
- Be consistent with your mechanisms (e.g., website, email, social media, speeches, meetings)

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Communicating with Donors – The Ladder of Influence

- Person to person
- Personal letter with phone follow-up
- Personal phone call
- Personal letter
- Fund-raising benefit
- Impersonal letter/direct mail
- Impersonal telephone call (telemarketing)
- Newsletter
- Brochure
- News Story
- Media advertising

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Communicating with Donors-Stewardship

- Strategies to acknowledge supporters
- Keeping donors informed through internet, mailings and events
- Involvement/engagement strategies (e.g., individual donors, grant makers, volunteers, clients/customers)

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Communication Strategy

Source: <http://socialvelocity.net/>

Point of Communication	One Approach - Making a Donation	A Better Approach - Making an Investment
Organization's Viewpoint	Beggar Mentality	Investor Mentality – Opportunity for ROI
Organization's Methodology	Asking without strategy	Strategic Fundraising
Organization's Message	Giving to help meet a goal	Investing in community – making a difference
The ASK	A new program to serve youth	Opportunity to provide...for ...in my community
Donor's Viewpoint	How do I benefit	How can I change world...do something bigger than myself
Reason for Contribution	Our programs need to be funded...	X% of youth in Y county live below poverty...
Benefits to Donor	Recognition – name listed on website	Social ROI...\$ saved



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The Case of Support

Why have a case for support?

The case summarizes:

- reasons you exist
- needs you are meeting in the community
- why people should support you

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The Case of Support

More about your Case of Support

- focus on results, not your needs
- people invest in organizations that have a positive impact on their community
- adapt your message appropriately to the interests of a particular prospect

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The Case for Support

- Long range or strategic direction plan
 - History
 - Problem and proposed solution
 - Goals & objectives
 - Sources of funding/communities role
 - Sustainability of organization
 - How to donate
 - Leadership
 - Benefits and conclusion

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The Case for Support

- Case Statement
 - written version of the case of support
 - for specific constituency
 - for specific campaign
 - fundraising goal

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The Case for Support

- Answer the following questions:
 - What problem are you trying to solve?
 - Why are we best suited to solve problem?
 - How much will the project cost?
 - Why is solving the problem so important now?
 - How will money be spent to solve problem?
 - What is the plan for fundraising?
 - What are the benefits to the community?
 - What are the benefits to the donor?



Preparing to make “The Ask”

- What are the concerns and issues of the community?
- What does your organization offer to the community?
- Do you have competitors for support within the community in terms of services and programs you offer?
- Who are the leaders in the community and can you enlist their support?



Preparing to make “The Ask”

- What is of value and important to the community you want to support your organization?
- What are the concerns and issues of the community?
- Who are the leaders in the community who have in interest in your cause and how you enlist their support?
- Do you have competitors for support within the community in terms of services and programs you offer?



The Ask

- Organize your campaign around key prospects identified and cultivated
- Strategy is critical in the solicitation
 - the right person asking the right person for the right amount at the right time
- Make your assignments carefully and wisely and watch your timing



Preparing to make “the Ask”

- You will have done your best to prepare if:
 - You have the right prospect
 - You have cultivated your prospect
 - You know the prospects interests
 - You know the amount you will ask for



The Ask

- Solicit friends/others prefer to ask those they do not know well.
- Assign prospects with whom the solicitor is going to feel most comfortable.
- Send a board member and staff person.
- Solicitation teams should rehearse their presentation ahead of time.



The Ask

- Develop talking points for each participant
- State the mission of the organization and purpose of the a specific project and/or
- State campaign goal/timeline and specific amount to be requested
- Why project so important to the community?



The Ask

- Why they should care as a business or individual in the community?
- What is in it for them (return on investment, cost savings, etc.) and what are the benefits to the donor (share a few of the benefits from the benefits page)?



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The Ask

- Use inclusive language when asking for a gift (“join with us...”)
- Explain the impact the gift will have on the organization’s programs.
- Be a good listener.
- Be prepared to handle objections about your organization or about the prospect’s feelings regarding a donation.

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Cultivation

- Cultivation
 - Research donor – employment, family, interests, community service (sources: board members, friends, colleagues, newspaper, professional publications)
 - Determine a donor’s interests and align with the mission of your organization
 - Schedule meetings with prospects and/or identify opportunities to meet potential donors (community foundation events, nonprofit events, association activities)

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Cultivation

- Cultivation
 - Invite prospects to:
 - serve on the Board of Directors or Advisory Board
 - serve on a Board Committee
 - participate in events
 - host an event on behalf of the organization (dinner party)

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Stewardship

- “Stewardship”-- the process of maintaining an ongoing relationship with donors and understanding preferences
 - A new relationship begins when a gift is made
 - Donors like to know that their gift has made an impact
 - Donors like to hear from the organization between asks

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Fundraising Materials

- elevator or grocery line speech
- case statement document
- strategic fund development plan
- frequently asked questions sheet
- annual report
- tri-fold brochure
- newsletter
- fact sheets
- corporate/church packets

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Relevant Resources

- www.IKnow.org
- www.BoardSource.org
- www.nonprofit.about.com
- www.fundraising123.org
- <http://Fundraisingcoach.com>
- <http://ccfbest.org/fundraising/elementswinningcase.htm>
- <http://raise-funds.com/>

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Relevant Resources

Publications

- Small Message, Big Impact: How to Put the Power of the Elevator Speech Effect to Work for You - Terry L. Sjodin
- Breakthrough Nonprofit Branding: Seven Principles to Power Extraordinary Results - Jocelyne S. Dow and Carol Cone
- BrandRaising: How Nonprofits Raise Visibility and Money Through Smart Communication – Sarah Durham

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Relevant Resources

Websites

- http://nonprofit.about.com/od/nonprofitbranding/Nonprofit_Branding.htm
- <http://www.guidestar.org/rxa/news/articles/2011/how-to-develop-nonprofit-brand.aspx>
- <http://www.philanthropyjournal.org/resources/marketingcommunications/developing-elevator-speech>
- <http://nonprofitanswerguide.org/faq/marketing-communications/what-is-an-elevator-speech-and-why-should-i-have-one/>

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QUESTIONS

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