



Fundraising Strategies for Today and Tomorrow

**Sponsored by Nonprofit Support Program
Hartford Foundation for Public Giving**

With Kim Klein

KLEIN & ROTH CONSULTING

Real money. Real people. Real change.

Focus on the Common Good

The overall health of a community depends on:

- Building movements, not just institutions
- Addressing root causes alongside direct service
- Playing well with other organizations
- Mobilizing people, not just donations



The People Who Give:

- ▶ **Most people:** 65% of adults give away \$\$
- ▶ Give to 5-10 organizations each year, most of which are fairly similar.
- ▶ Equal numbers of men and women.
- ▶ # 1 reason people make a donation: someone asked them.
- ▶ #1 reason people don't give: they say they were not asked.

Comparing Strategies: Attracting New Donors

| | <u>Strategy</u> | <u>Response rate</u> |
|---|--------------------------|----------------------|
| <i>More Time per donor</i>  <i>Less Time per donor</i> | In person asking | 50% |
| | Personal Phone Call | 25% |
| | Personal Letter or email | <u>10-15%</u> |
| | Phone bank | 3-5% |
| | Direct Mail | .5-1% |
| | Email /on-line | .08% |
| | Special Events | Varies |

Giving is an Exchange of Values

Go from this:

“Please, please, please...”



To this:

“I think you would be interested....”



Know What You Need to Raise



A Simple Chart

Goal: \$50,000

| <u># of gifts</u> | <u>size</u> | <u># of prospects*</u> |
|-------------------|-------------|------------------------|
| 2 | \$5000 | 8 |
| 4 | \$2500 | 16 |
| 10 | \$1000 | 30 |
| 20 | \$500 | 40 |
| 40 | \$250 | 80 |

76 gifts X 2 = 152 prospects

** You will need 2 times the number of prospects as the number of gifts*

Make Sure Every Entry Point Invites a Donation

If I found out about your organization from

--your website,

--your e-newsletter

--a friend

--a special event

--dropping by your office



Would I know that you raise money from people like me?

Be visible
wherever
people
might find
you



 **LIGHTHOUSE FOUNDATION**
2443 Kings Way Avenue - Charleston, Georgia 31204
Paul Peterson, Director - Email: ppeterse@lwhf.org
Phone: 706-244-3201

All Proceeds will be donated to County Food Bank

Name: _____ Date: _____
Address: _____
City: _____ State: _____ Zip: _____
Telephone: () _____ Email: _____

Amount: \$ _____



Announcing Our New Strategic Plan

Read about our Healthy
Neighborhoods vision in our
[2013-2016 Strategic Plan](#)

Recent News

Jack London Gateway Selected For Architecture at Zero Competition

Jul 15, 2014

EBALDC's Jack London
Gateway has been chosen
as the project site for the
Architecture At Zero
competition.

Waitlist Applications For 4-BR Units Open at Oakland Point, L.A.

Donate

Healthy Neighborhoods Start with You.

Imagine an Oakland and an East Bay where every neighborhood provides a range of housing options near quality schools, thriving businesses, reliable public transit, and markets full of fresh, nutritious food. This is our vision of a Healthy Neighborhood, and we believe everyone, regardless of income, education or ethnic background, deserves to live in one.



EBALDC: Building Healthy Neighborhoods from Christie Goshe on Vimeo.

Donate

Build your e-mail list



- ✓ Collect addresses on website, & from offline donors and constituents
- ✓ Plan for churn / unsubscribe rate of 19%
- ✓ Ask people to forward emails to their contacts
- ✓ Use social media: Run regular 'join our email list' asks and drives via Facebook, Twitter, etc.

Using Events Effectively

What are events for?

- To get publicity
- To increase visibility
- To raise money (and not always)

Your “visibility quotient”

Of all the people who should know about you, what percentage actually do? Who doesn't?

What will attract them?



The Purpose of Fundraising is to Build Relationships



Evaluating your Relationship Building Efforts

1. We invite people to make their first gift through: (*events, door to door, on-line*)
 2. We invite people to give a second, third, fourth gift by: (*newsletter, fall appeal, gala*)
 3. We ask people to consider increasing their gift by: (*monthly donor program, upgrading campaigns*)
- 

Focus on Real Prospects

Access:

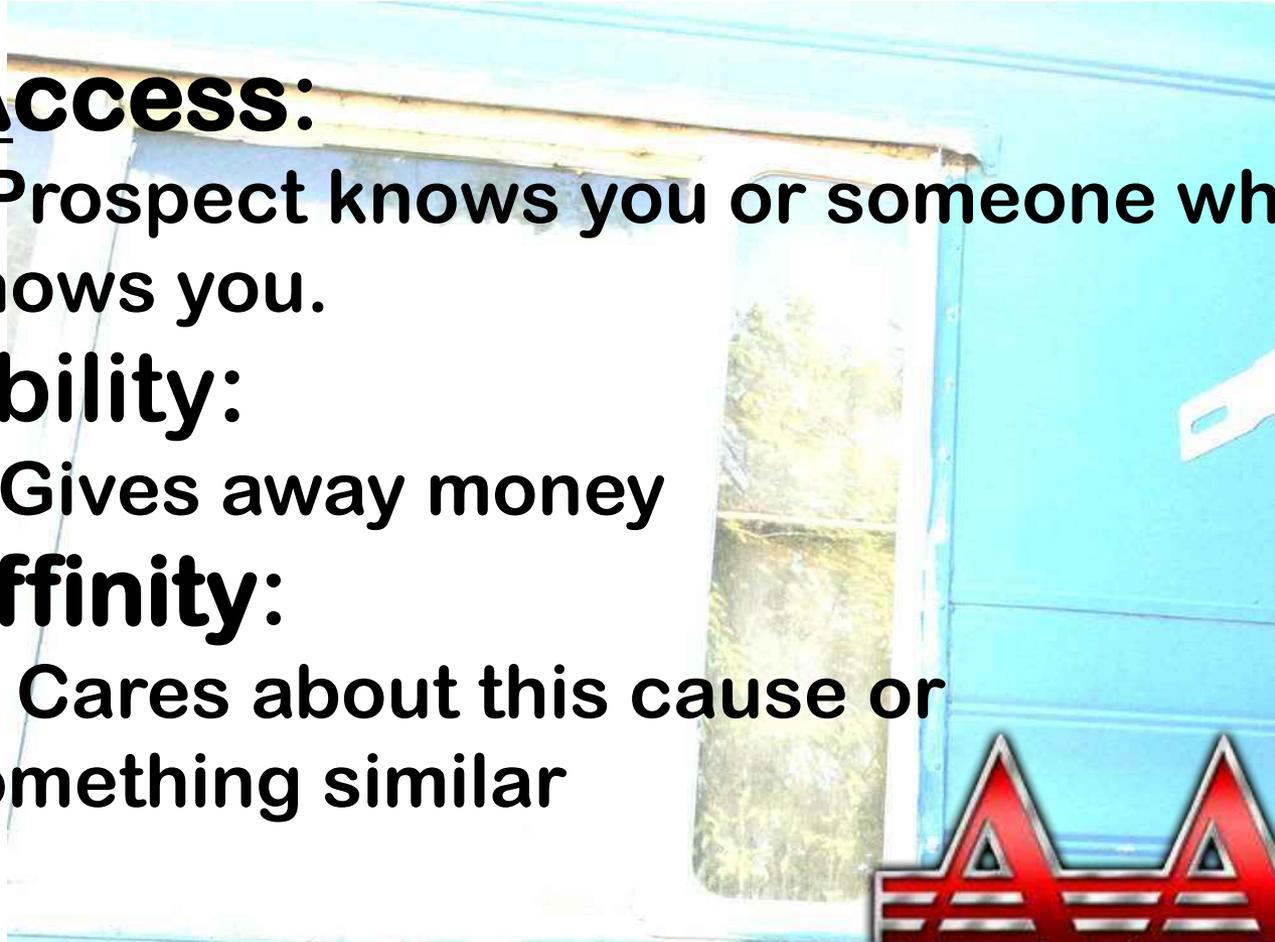
Prospect knows you or someone who knows you.

Ability:

Gives away money

Affinity:

Cares about this cause or something similar



Affinity for the Cause is Critical

Sounds great. I think it is fantastic.



I wish you well

I want to be part of this.
Here is my gift.



I will give money

Build a Fundraising Team

Board of Directors

Former board and staff

Current and former volunteers

Team players, not lone wolves



Team Members:

Make their own gift

- ▶ Gift should be significant to that person
- ▶ Only total giving needs to be known by the whole team

Participate in fundraising in **SOME WAY**

- Play to the strengths of the each person
- Start with easy tasks and move to harder ones

Every Fundraising Team Needs:

A way for everyone to participate. Some:

- ▶ will ask for money and some won't
- ▶ love events, and some don't
- ▶ enjoy working alone, others in teams
- ▶ prefer approaching strangers
- ▶ prefer working with institutions

Who are you?

Is your team balanced amongst all the styles?

The Biggest Gifts are Solicited Personally



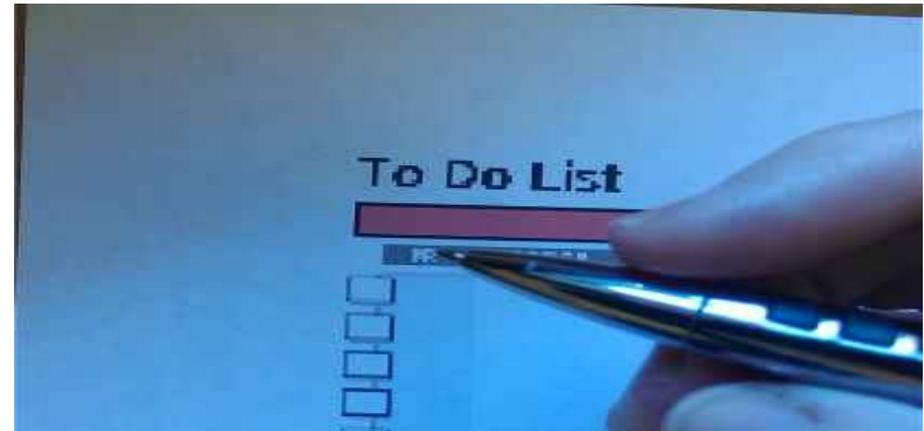
Methods of Personal Asking:



Preparation

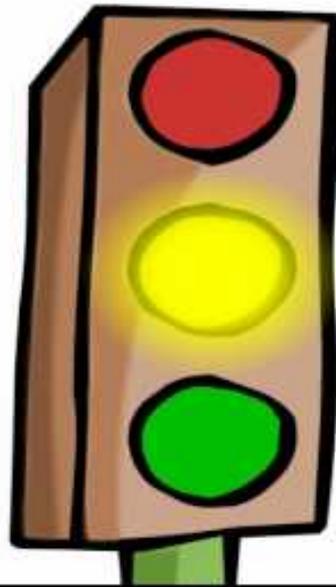
Have ready:

- ▶ **Stories**
- ▶ **Statistics, including comparisons**
- ▶ **Philosophical reasons why this is important**
- ▶ **Responses to common objections and questions**
- ▶ **Budget and fundraising success so far**



It's a conversation....

Ask yourself, "Why Am I Talking?"



WAIT

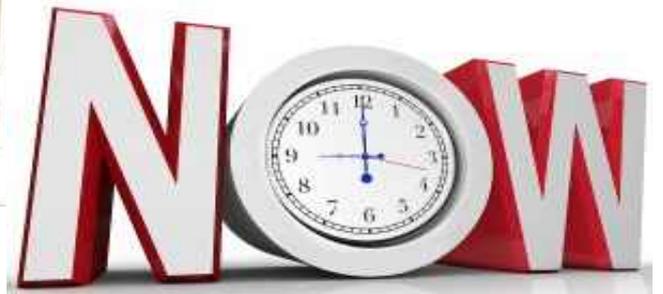
Be Sure to Close



\$50,000 in Six Weeks

Why a six week campaign?

- Higher board participation because the end is in sight
- Brings in volunteers who don't want to be involved year round
- Creates excitement, prevents burnout
- Appeals to people who dislike fundraising



Steps for campaign success

- 1. Decide purpose of campaign and goal**
- 2. Choose the right time**
- 3. Recruit the team**
- 4. Prepare campaign materials**
- 5. Identify prospects**
- 6. Orient & train team**
- 7. Launch & manage the campaign**
- 8. Evaluate & celebrate**

Step 1: What are you raising \$ to do?





Caveat: Don't Fixate on \$50,000

If you:

- ▶ are just starting out
- ▶ work in a poor community
- ▶ don't need \$50,000
- ▶ prefer weird numbers

Pick a goal that works for you.

\$10,000, \$17,501, \$23,000: what is important is to meet or exceed the goal!



Step 2: Choose the Right Time

Pick a 6 week period of time for the campaign.

Add 1 week preparation time

Add 1 week follow-up time

TOTAL TIME FOR ORGANIZERS : 8 weeks



Step 3: Recruit the solicitors

Board and former board

Staff and former staff

Recently retired people

Volunteers

Former volunteers

Be very clear that you will have to ask for \$\$!!



Calculate # of volunteers

prospects / 6 weeks = # asks a week

ASSUME: one person can complete three asks a week

asks a week / 3 = # volunteers needed

For example:

150 prospects / 6 weeks = 25 asks a week

25 asks / 3 per person = 8-9 volunteers

Volunteers Need to:

- Care about cause
- Give themselves
- Have 2 hours/week for 6 weeks
- Have flexible schedules
- Be friendly; interested in others
- Be able to keep on track and work in a team



Step 4: Create Materials

- ▶ One page description of the campaign
- ▶ Create e-mail for solicitors (link embedded)
- ▶ Announcement on website and FB
- ▶ Create a letter for regular mail
- ▶ Develop FAQs for solicitors

NOTE: NO NEED FOR FANCY MATERIALS

Step 5: Identify Prospects:

- Friends and colleagues of solicitors
- Current donors: who could give an extra gift?
- Lapsed Donors: people who used to give but haven't in over 18 months.

Step 6: Go over everything with the team

- *Go over message and materials

- *Assign prospects

- *Brief training on asking



Step 7: Keep Campaign on Track

**Keep in close touch with volunteers.
E-mail a weekly report to team with each
person's progress.**

"Shout out to Eric for getting 2 gifts at \$250 this week. Mary finished all her follow up and so far has 10 donors and \$1,000!! Close behind is Jorge with 7 donors and \$1700. Bethany has 14 new donors—this is fantastic! And not to be outdone, Mabel has 3 donors giving \$200 each."

The Final Week

Call (ideally) or contact any of prospects who haven't given so far.

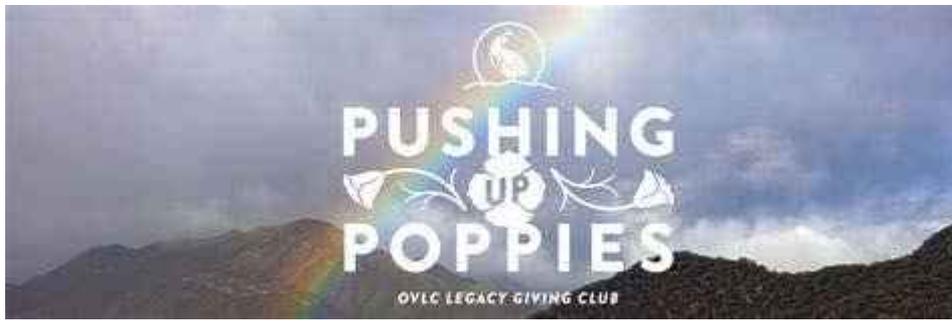
“Will you put us over our goal?”

Those who have given will get a rousing thank you from the solicitor.

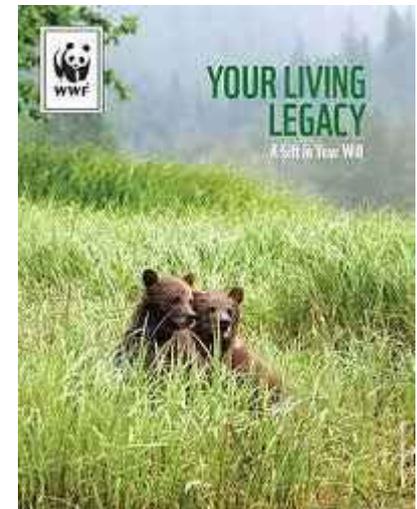


Step 8: End, Evaluate & Celebrate





Legacy Giving



Generational Change

Two generations born 1901-1945

Total: 75 million

Baby Boomers: Born 1946-1964

Total: 76 million

Gen X: Born 1965-1980

Total: 46 million

Millenials: 1980-2002

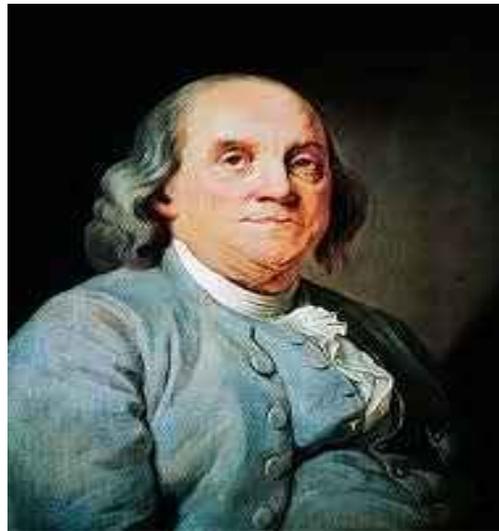
Total: 76 million

I-Gen (Gen Z) 2003-2022(?)

So far @ 40 million

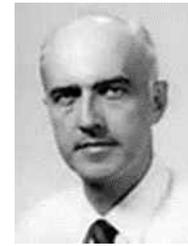
Famous Bequests

Benjamin Franklin died April 17, 1790. He left Boston and Philadelphia \$2,000. The money was not to be distributed until 200 years after his death. In 1990, the bequest was worth \$6.5 million!



Richard LeRoy Walters

1935-2007



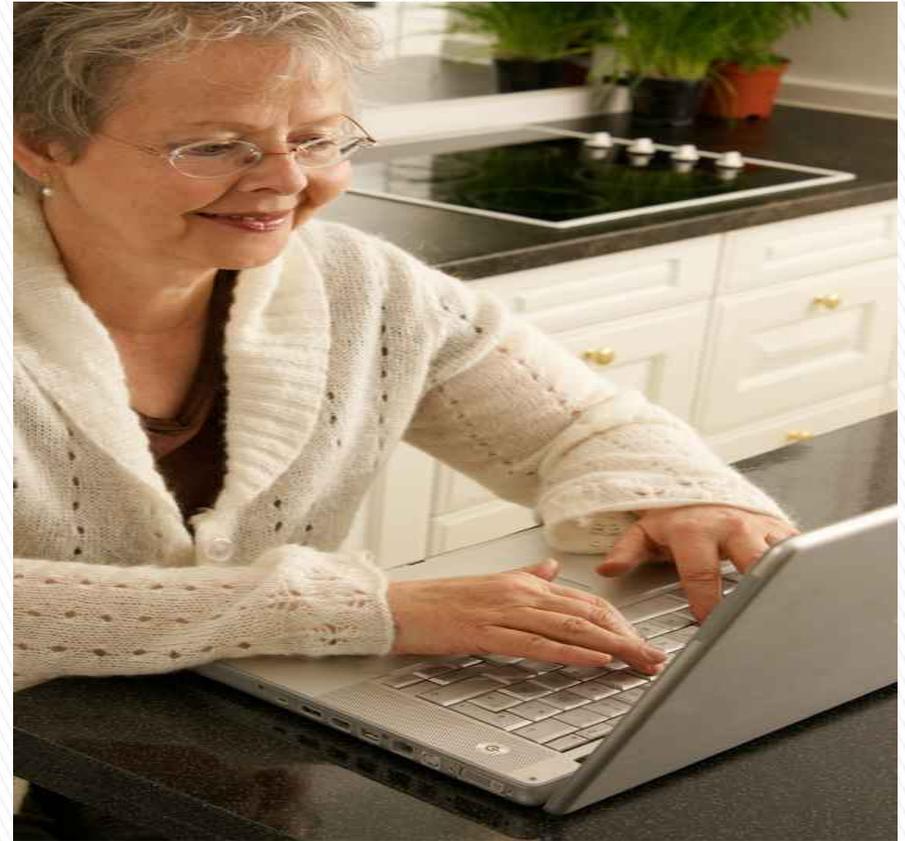
- **Jet Propulsion Engineer and Former US Marine**
- **Forced into early retirements after 23 years**
- **Lived (and died) on the streets of Phoenix, AZ**
- **Refused to move into any kind of housing**
- **Made all his investment calls using the public telephone at the Senior Center**
- **Left \$4 million to ten charities, including National Public Radio**

Most Bequests:

From long time
donors

Who gave small
gifts

Whom you rarely
or never met



Start Promoting Bequests

40% of adults have an estate plan

8% of those leave \$ to charity

90% of those are bequests

CHANGE IT.

FOR GOOD.

Starting the Conversation: Legacy is about mission and future vision

HEARTLAND LEGACY SOCIETY
For good. Forever.



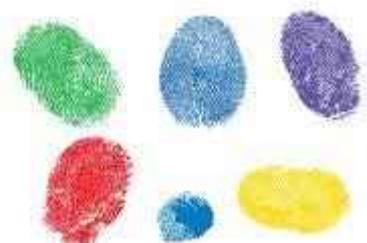
Impact your passion **FOREVER** through gift planning with **Truman Heartland Community Foundation**

| | | |
|--|--|--|
| <p>YEAR 1</p> <p>1 SEED</p> <p>\$1000 DONATION</p> | <p>YEAR 10</p> <p>\$206,000 in Qualitative Equity and Income*</p> <p>\$10000 DONATION</p> | <p>YEAR 50</p> <p>\$541,000 in Qualitative Equity and Income*</p> <p>\$300,000 FOREVER DONATION</p> |
|--|--|--|

Multiply your impact with TIME!

*Qualitative equity and income, often called "phantom" income, is a non-cash benefit you receive by gift planning through the Heartland Legacy Society. Together with our income tax-paid Mini-Retirement Plan and the Charitable Tax Deduction, the Charitable Rollover Program offers you more than 50 years of income. To learn more about the Charitable Rollover Program, please contact us today. Legacy is about giving to our community.

*Your legacy is yours to give to the good work you wish to see done in the world. We thank those who have made that commitment but a legacy is yours to give to those who are passionate about giving to our community.



What's your Legacy?

WHEN YOU COME BACK AS A WHALE YOU'LL BE BLOODY GLAD YOU PUT GREENPEACE IN YOUR WILL.

1800 81 51 51

A Legacy of Love

When planning for the future, (Most) remember the animals in your will

You could make a significant difference and save lives.



Winnipeg Futures Society



PATH Futures

Leave a legacy of health through our planned giving program »



THE WINNIPEG FOUNDATION



For Good. Forever.

Focus on Bequests & Beneficiary Designations

Easy for donors to understand and execute
Don't require expertise
Easy to receive gifts



Types of Bequests

- ▶ **The General Bequest**
 - ▶ **Income Only to be Used**
 - ▶ **Bequest of a Percentage**
 - ▶ **Bequest of Residue**
 - ▶ **Contingent Bequest**
- 

Open the Discussion

**Do you
remember
when...?**

**When our
organization
thinks out 50
years, we...**

**What would you
most like to see
change with
regard to this
issue?**

**Just in the years
we have been
working on this
issue, we have
seen....**

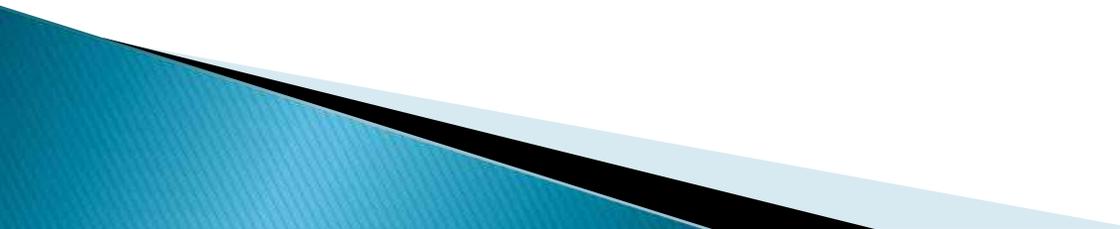
All giving is about:

- ▶ **Organizational mission**
- ▶ **Building Relationships**
- ▶ **Persistence**
- ▶ **Preparation**
- ▶ **Commitment**
- ▶ **Planning**
- ▶ **Evaluation**



Our plan for the rest of the year

Answer these questions

- 1) What is the **ONE** thing YOU could do that would make a big difference in the fundraising efforts of your organization?
 - 2) What do you want to accomplish before the end of November?
 - 3) What do you want to accomplish before January 1, 2020?
- 

About the Presenter

Kim Klein is the author of five books, including the classic text, **Fundraising for Social Change**, recently released in a **SEVENTH** edition. She also wrote **Reliable Fundraising in Unreliable Times**, which won the **McAdam Book Award** in 2010.

She has provided training and consultation in all 50 United States, five Canadian provinces and 21 other countries. She is a lecturer at the School of Social Welfare at the University of California, Berkeley, and has served as guest faculty at the Haas School of Business and Concordia University in Montreal. She lives in Point Reyes, CA

