



# **Fundraising Strategies for Today and Tomorrow**

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

**With Kim Klein**

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**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	10-15%
	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**

# of gifts	size	# of prospects*
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: [ppeterson@wlhlf.org](mailto:ppeterson@wlhlf.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, 1-B

## 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*)
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# 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

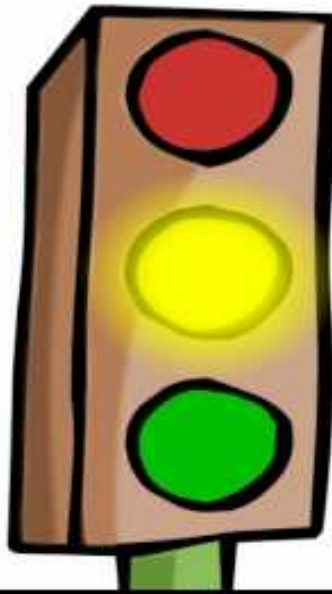
Have ready:

- ▶ 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**



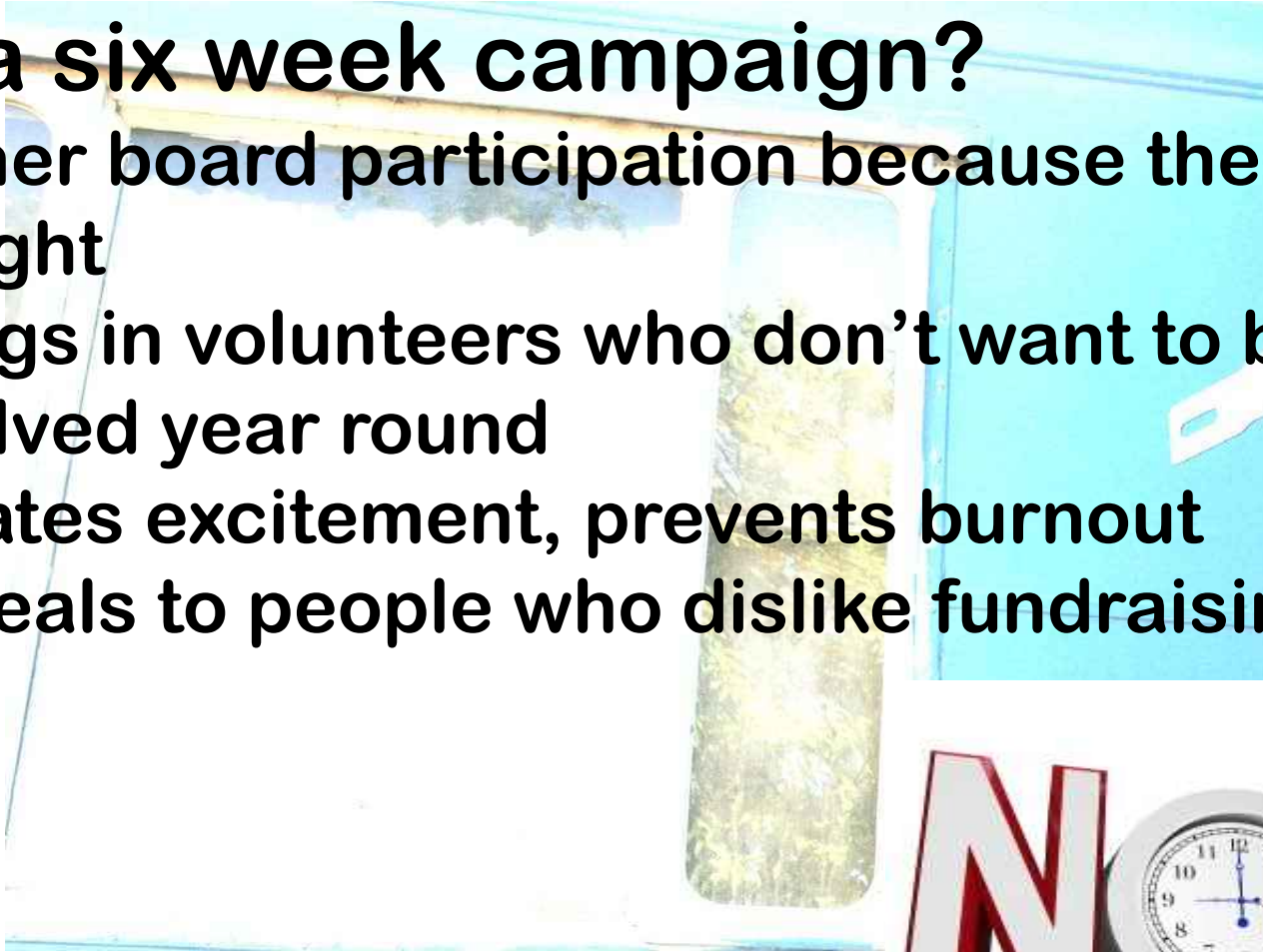
# Be Sure to Close



# \$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.**



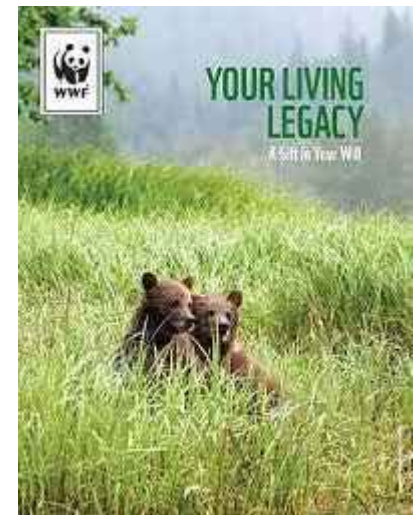
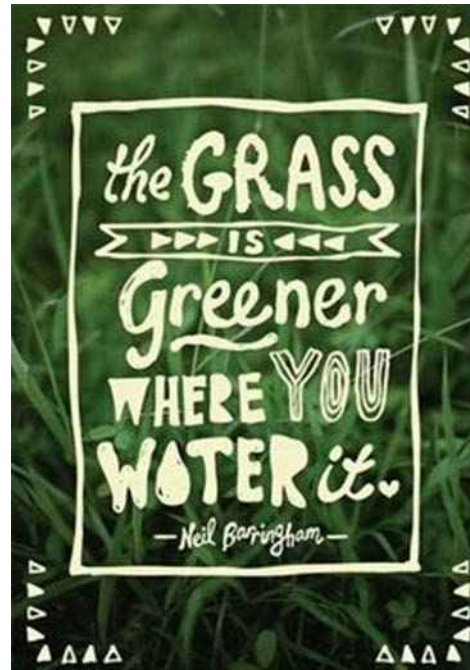


## Step 8: End, Evaluate & Celebrate





# 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**

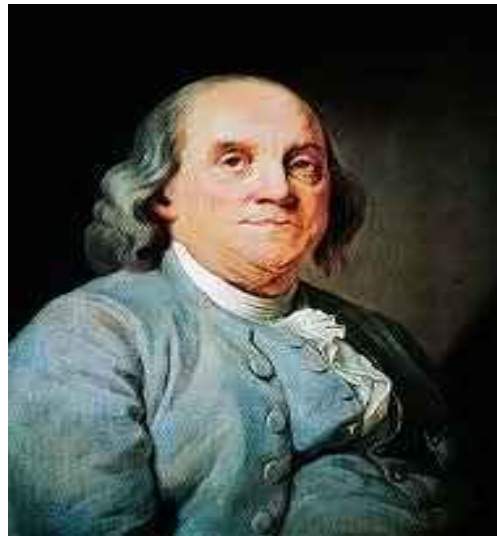
**Total: 76 million**

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

**So far @ 40 million**

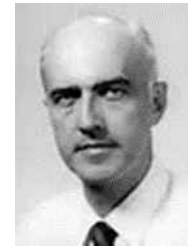
# Famous Bequests

**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**

**YEARS** 100  
\$200,000 in cumulative equity and income

**YEARS** 20  
\$500,000 in cumulative equity and income

**YEARS** 50  
\$1,000,000 in cumulative equity and income

**YEARS** 100  
\$2,000,000 in cumulative equity and income

Multiply your impact with TIME

Legacy is a commitment, often an emotional one, that you make to your future. It's a way to ensure that your passion lives on forever. The Heartland Legacy Society is a group of individuals who share a common goal: to create a lasting legacy of giving to the community. The Legacy Society is a group of individuals who share a common goal: to create a lasting legacy of giving to the community. The Legacy Society is a group of individuals who share a common goal: to create a lasting legacy of giving to the 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, please remember the animals in your will. You could make a significant difference and give a gift that lasts.

**THE ANIMAL WELFARE SOCIETY**



**PATHFutures**

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