



MARIBETH CANNING CONSULTING

Philanthropy Bootcamp





Maribeth Canning

20+ years of experience driving strategy, fostering connections, developing trust, and generating record fundraising results.

Survey



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What would you like to learn in this session?

TRENDS ✓

- Current **fundraising practices** – what's working and what's not.
- New fundraising methods

RESEARCH ✓

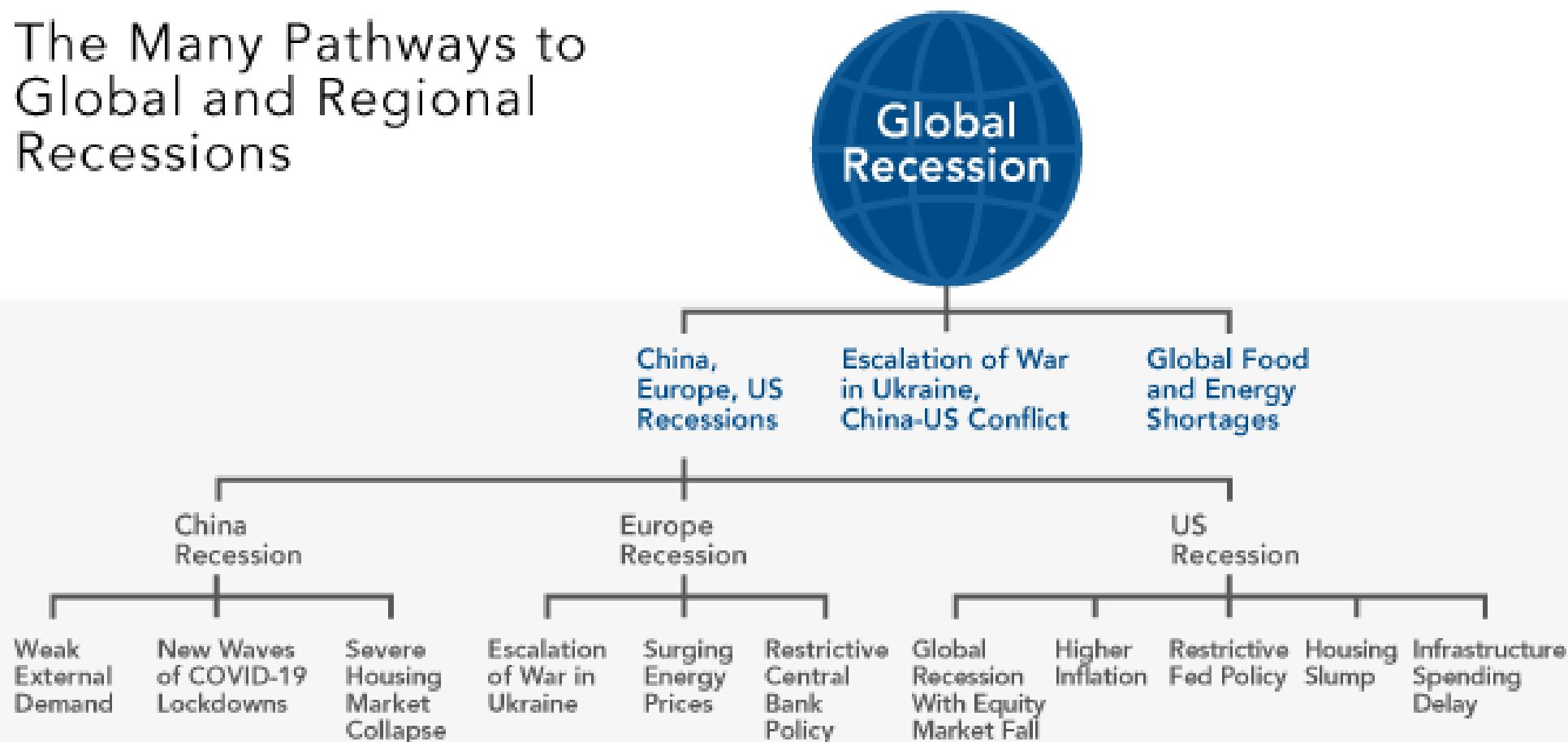
- Building a donor **database**
- Data **analytics** and donor forecasting
- Strategies to identify, pre-screen, and **cultivate high net worth individuals**

FUNDRAISING DISCIPLINES ✓

- How to approach **major donors?**
planned giving and **grants?**
- How to hold **fundraising events** as a small nonprofit with a small board?
- Corporate **match programs?**
- How to **engage board members** in fundraising?
- How to appeal to **all generations?**
- How to prove **value** to sponsors?

2022-2023 Environment

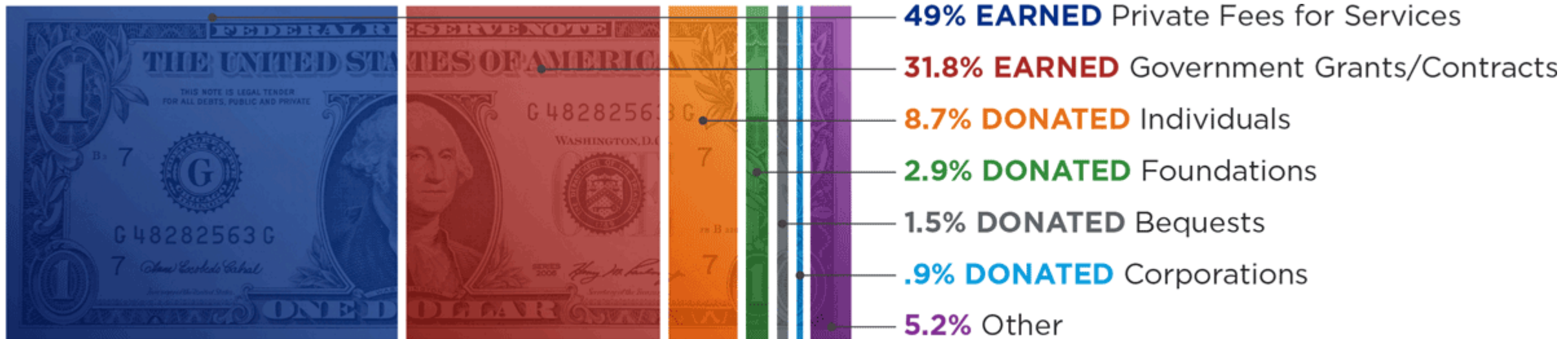
The Many Pathways to Global and Regional Recessions



Funding Sources of Nonprofits

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DIVERSIFY FUNDING STREAMS



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True or False

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1. During the recession from 1972-1975 giving did not decline but remained the same. True or False?
2. High inflation reduces the purchasing power of average Americans not wealthy individuals. True or False?
3. Donors understand that the need is greater during recessions, so they are more generous. True or False?



- TRUST
- DIGITAL CONNECTION
- PERSONAL PRIORITIES
- OPTIONS

Research

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1. Conduct Prospect Research
2. Prioritize
3. Open Networks
4. Gather Introductions
5. Discovery



Research

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Donor Research Software



Research Consultants



Donor Management (CRM)



Annual Giving

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If you light a lamp for
somebody,
It will also brighten
your path.

-BUDDHA



DIGITAL



SOCIAL MEDIA



DIRECT MAIL



EVENTS



PHONE



FACE TO FACE

Best Practices

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GOALS

Set attainable goal
with growth
expectations



INTEGRATION

Integrate channels:
direct mail, website,
social media, phone,
text



EVENTS

Stage strategic events:
educational,
engagement and
fundraising



RELATIONSHIPS

Invest time in
relationship building

Digital Best Practice

- Customized giving forms
- Branding
- Subscriptions
- Social media
- Mobile optimization
- Text-to-Donate
- Data collection & analysis



Event Best Practice

- Select clear goals
- Choose an appropriate event & theme
- Detail logistics
- Use creative promotion & marketing
- Research CSR/ESG
- Recruit sponsorship strategically
- Organize a dry run
- Encourage real time, on-the-go donations
- Develop a **post-event strategy**



Direct Mail

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**YOUR
GIFT
GIVES
HOPE**



PERSONALIZE

Address by name,
reference impact



THANK

Express gratitude
first



ENGAGE

Offer a compelling
story, testimony



FOLLOW UP

Multiple occasions &
methods

Grants

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Government, Public & Private, Corporate Foundations Preparation

1. Target grantor/funders
2. Understand guidelines
3. State the need
4. Identify the solution
5. Demonstrate due diligence



Grants

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Letter of Inquiry & Proposal Elements

1. Cover Letter
2. Cover Sheet
3. Narrative
4. Budget
5. Qualifications
6. Conclusion
7. Appendices



Corporate Match Programs

1. Nonprofits with an excellent reputation

- Transparent: measure, evaluate & report
- Audience
- *Marketing*
 - invitation, program, event...*social media?*
- Enhance brand, consumer loyalty & spending

2. CRS alignment

- Diversity, Equity and Inclusion
- Social Justice
- Financial Literacy & Career Opportunity
- Community Development
- STEM Education

Communicating Value

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Interviews:	In-depth, flexibility but, expensive and time consuming
Focus Groups:	Detailed & cost-effective, speed & efficiency w/ results, but risk of bias
Survey:	Detailed & cost-effective, but risk of bias
Questionnaires:	Large scale & cost-effective, but not in-depth
Open Data:	Large scale & cost-effective, but not in-depth or specific
Observation:	Easy & cost-effective, but risk of bias

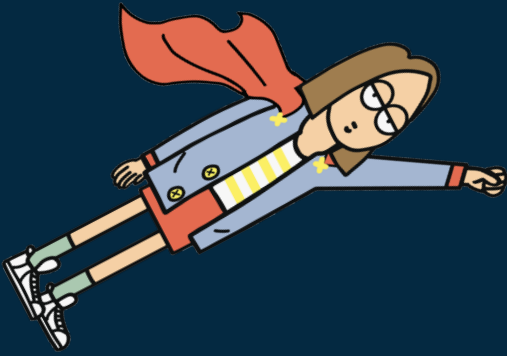
Planned Giving

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Planned Giving Best Practice

- Familiarize staff & board
- Create advisory board
- Invite trustees & executives first
- Identify potential prospects
- Create marketing strategies
- Send communication
- Acknowledge donors





Recession Proof Trends

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**Diversify Funding
Streams**

Baby Boomers

Donor Discovery

**Donor Advised
Funds**

Impact Reports

Why People Don't Give to Nonprofits $\frac{MC}{C}$



?



Why People Give to Nonprofits

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The #1
reason
people give:

Because they
were asked

How Board Members Can Get Involved

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Make personal contributions



Comprehend organizational funding priorities



Identify, introduce & engage potential donor

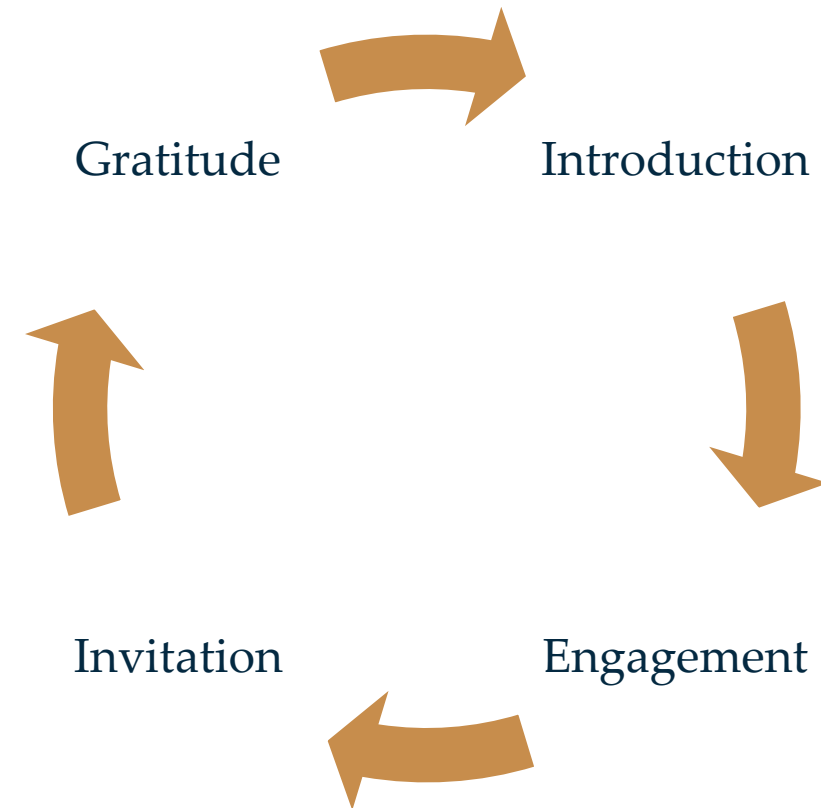


Send letters of appreciation and invitations to special events



Offer donors updates and gratitude

Generosity Cycle



STEP 1: Introduction

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STEP 2: Engagement

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STEP 3. Invite

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STEP 4: GratITUDE

Stewardship Best Practices

- Personal Gift Processing
- Acknowledgement
- Recognition
- Donor Intent



MCC Tools

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Event Planner & Timeline
Board Reflection Exercise
Funding Priorities Template
Prospect Discovery Questions

Questions

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Gratitude

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