Philanthropy Bootcamp
Maribeth Canning

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

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

Survey
2022-2023 Environment

The Many Pathways to Global and Regional Recessions

- China, Europe, US Recessions
- Escalation of War in Ukraine, China-US Conflict
- Global Food and Energy Shortages

- China Recession
  - Weak External Demand
  - New Waves of COVID-19 Lockdowns
  - Severe Housing Market Collapse
  - Escalation of War in Ukraine
- Europe Recession
  - Surging Energy Prices
  - Restrictive Central Bank Policy
- US Recession
  - Global Recession With Equity Market Fall
  - Higher Inflation
  - Restrictive Fed Policy
  - Housing Slump
  - Infrastructure Spending Delay

Source: The Conference Board, 2022
Funding Sources of Nonprofits

DIVERSIFY FUNDING STREAMS

- **49% EARNED** Private Fees for Services
- **31.8% EARNED** Government Grants/Contracts
- **8.7% DONATED** Individuals
- **2.9% DONATED** Foundations
- **1.5% DONATED** Bequests
- **.9% DONATED** Corporations
- **5.2% Other**

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?**
Trends

- TRUST
- DIGITAL CONNECTION
- PERSONAL PRIORITIES
- OPTIONS
1. Conduct Prospect Research
2. Prioritize
3. Open Networks
4. Gather Introductions
5. Discovery
If you light a lamp for somebody,
It will also brighten your path.

-BUDDHA
Best Practices

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

**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
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
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
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 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

- Diversify Funding Streams
  - Baby Boomers
  - Donor Advised Funds
  - Donor Discovery
  - Impact Reports
Why People Don’t Give to Nonprofits

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Why People Give to Nonprofits

The #1 reason people give:

Because they were asked
How Board Members Can Get Involved

- 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

- Gratitude
- Introduction
- Invitation
- Engagement
STEP 1: Introduction
STEP 2: Engagement
STEP 3. Invite
STEP 4: Gratitude

Stewardship Best Practices

• Personal Gift Processing
• Acknowledgement
• Recognition
• Donor Intent
Event Planner & Timeline
Board Reflection Exercise
Funding Priorities Template
Prospect Discovery Questions