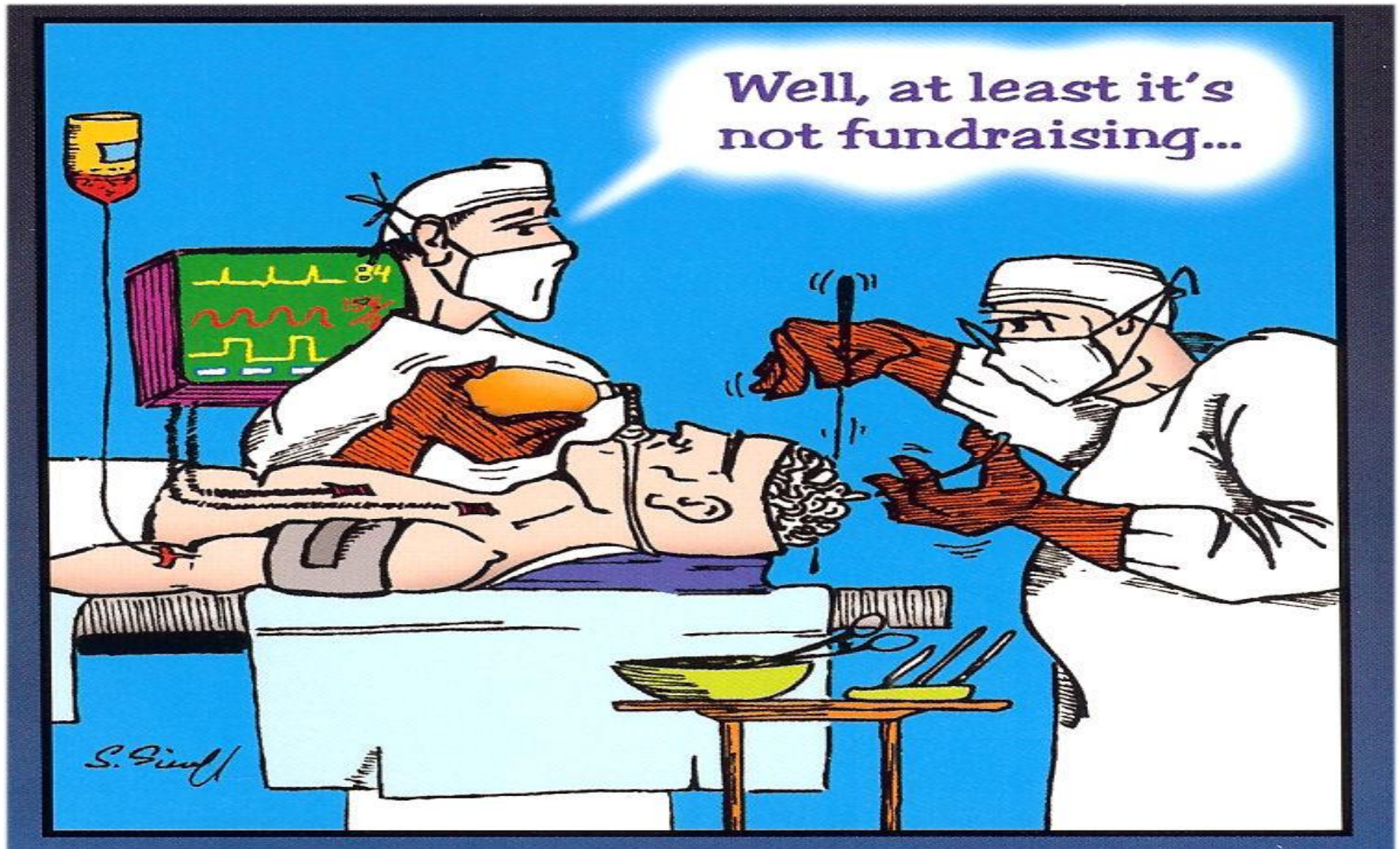


FOOLFROOF FUNDRAISING

Presented by
Barbara Dunsford
Development Consultant

Enterprise Bank Non-Profit Collaborative
November 7, 2017

THANK YOU ENTERPRISE BANK



EXPERIENCE

- ✓ Lowell House Inc
- ✓ Greater Lowell Community Foundation
- ✓ People's Club of Lowell Foundation
- ✓ The Wish Project
- ✓ Mahoney Family Foundation
- ✓ Girls Inc of Greater Lowell
- ✓ Lowell General Hospital
- ✓ Elder Services of the Merrimack Valley
- ✓ Girls Scouts of NH & VT
- ✓ The Community Family
- ✓ Academy of Notre Dame
- ✓ UMASS/Lowell
- ✓ D'Youville Foundation
- ✓ Founder of the annual Seacoast Women's Week in Portsmouth, NH
- ✓ 2016 Distinguished Alumni Award -UML Alumni Assoc.
- ✓ Yoga teacher
- ✓ Avid gardener, voracious reader, enthusiastic volunteer

WE ALL SHARE IN THIS PIE – \$17B + GIVEN IN 2016

In 2016, INDIVIDUAL DONORS drove the rise in philanthropic giving
And for only the sixth time in 40 years, all nine major philanthropy subsectors realized giving increases

\$390.05 billion

Where did the generosity come from?*

Giving by Individuals
\$281.86 billion

increased 3.9 percent (2.6 percent when inflation-adjusted) over 2015

Giving by Foundations
\$59.28 billion

was 3.5 percent (2.2 percent when inflation-adjusted) over 2015

Giving by Bequest
\$30.36 billion

declined 9.0 percent (10.1 percent when inflation-adjusted) over 2015

Giving by Corporations
\$18.55 billion

increased 3.5 percent (2.3 percent when inflation-adjusted) over 2015

Contributions by source
(by percentage of the total)

The single largest contributor to the growth in total giving was an increase of \$10.53 billion in **GIVING BY INDIVIDUALS**—offsetting declines from bequest giving.

Where are all the charitable dollars going?

(as a percentage of the total)



Giving to International affairs comprised a larger percentage of total charitable giving in the United States, increasing from 4 percent to 6 percent in 2016.



Giving to environment/animals increased 7.2 percent in 2016, the largest gain of any subsector, outpacing growth in overall giving for the last two years.

Each charitable subsector grew in 2016 except for giving to Individuals. Growth rates ranged from approximately 3–7 percent.

- 32% Religion** \$122.94 billion
- 15% Education** \$59.77 billion
- 12% Human Services** \$46.80 billion
- 10% To Foundations** \$40.56 billion
- 8% Health** \$33.14 billion
- 8% Public-Society Benefit** \$29.89 billion
- 5% Arts, Culture, and Humanities** \$18.21 billion
- 6% International Affairs** \$22.03 billion
- 3% Environment/Animals** \$11.05 billion
- 2% To Individuals** \$7.12 billion

Visit www.GivingUSA.org to learn more and to order your copy of *Giving USA 2017: The Annual Report on Philanthropy for the Year 2016*.

Giving USA Foundation™, The Giving Institute, and the Indiana University Lilly Family School of Philanthropy are pleased to continue their partnership in providing the most comprehensive, longest-running, and most rigorously researched resource on U.S. charitable giving, *Giving USA: The Annual Report on Philanthropy*. It is a privilege to report on Americans' generosity and related historical trends on U.S. charitable giving.

* All figures on this infographic are reported in current dollars unless otherwise noted.



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Shared intelligence.
For the greater good.



THE Giving Institute™
Shared intelligence.
For the greater good.



IUPUI
LILLY FAMILY SCHOOL OF PHILANTHROPY

FOOLPROOF FUNDRAISING



- What do you want to take away from today's workshop?
- Does anyone know what 54 means today?

KEY PIECES OF OUR FUNDRAISING



- Mission
- Storytelling
- Donor Centricity
- Leadership
- Analytics with Measureable Outcomes

MISSION

- ❑ Only one sentence to define you
- ❑ Purpose – why you exist, what is your cause, who you are serving (cats, environment, trees, children, sick, poor, preservation, opioids, etc.)
- ❑ Actions – what do you do? (and what makes you different from other “like” nonprofits)?
- ❑ Impact – what is the measurement of change? (save lives, clean rivers, provide meals, etc.)

EXERCISE - the 8 minute warm-up

- Take 1 minute to write your mission down
- Break up into pairs - exchange your mission
- Now ask ...
 - Purpose – is it clear?
 - Can you tell what they do?
 - Actionable?
 - Too short, long, just right? What makes it better?
 - Impact
 - Would you give to this NP and why?

SUCCINCT MISSION STATEMENTS



- **Wounded Warrior Project:** To honor and empower wounded warriors.
- **The Humane Society:** Celebrating Animals, Confronting Cruelty
- **March of Dimes:** We help moms have full-term pregnancies and research the problems that threaten the health of babies.
- **CARE:** To serve individuals and families in the poorest communities in the world

STORYTELLING??



“What if we raise money by selling the naming rights to our states?”

STORYTELLING

- ❑ Urgency
- ❑ Makes an impact on the reader
- ❑ Good news shared to the reader
- ❑ Distill the key points –
 - Emotional opening call to action
 - Help us to...
 - Call to action: send a check, go online, do it today!
 - Close with a real person signature- a client, donor, volunteer, leader, usually someone other than staff
- ❑ Message represents the heart and soul of NP
- ❑ Replicable for direct, media, brochure, etc use?

EXERCISE – the 10 minute treadmill

- Pair up. Take 2 minutes to read swapped appeals
- 3 minutes to evaluate it from:
 - Urgency
 - Impact
 - Emotional hook
 - Believable
 - Best signator(s)
 - Does it connect back to mission?
 - What's missing?
- General discussion 5 minutes

YOU WANT YOUR STORY TO ...



You may tell a tale that takes up residence in someone's soul, becomes their blood and self and purpose. That tale will move them and drive them and who knows what they might do because of it, because of your words. That is your role, your gift."

□ — Erin Morgenstern, *The Night Circus*

DONOR CENTRICITY

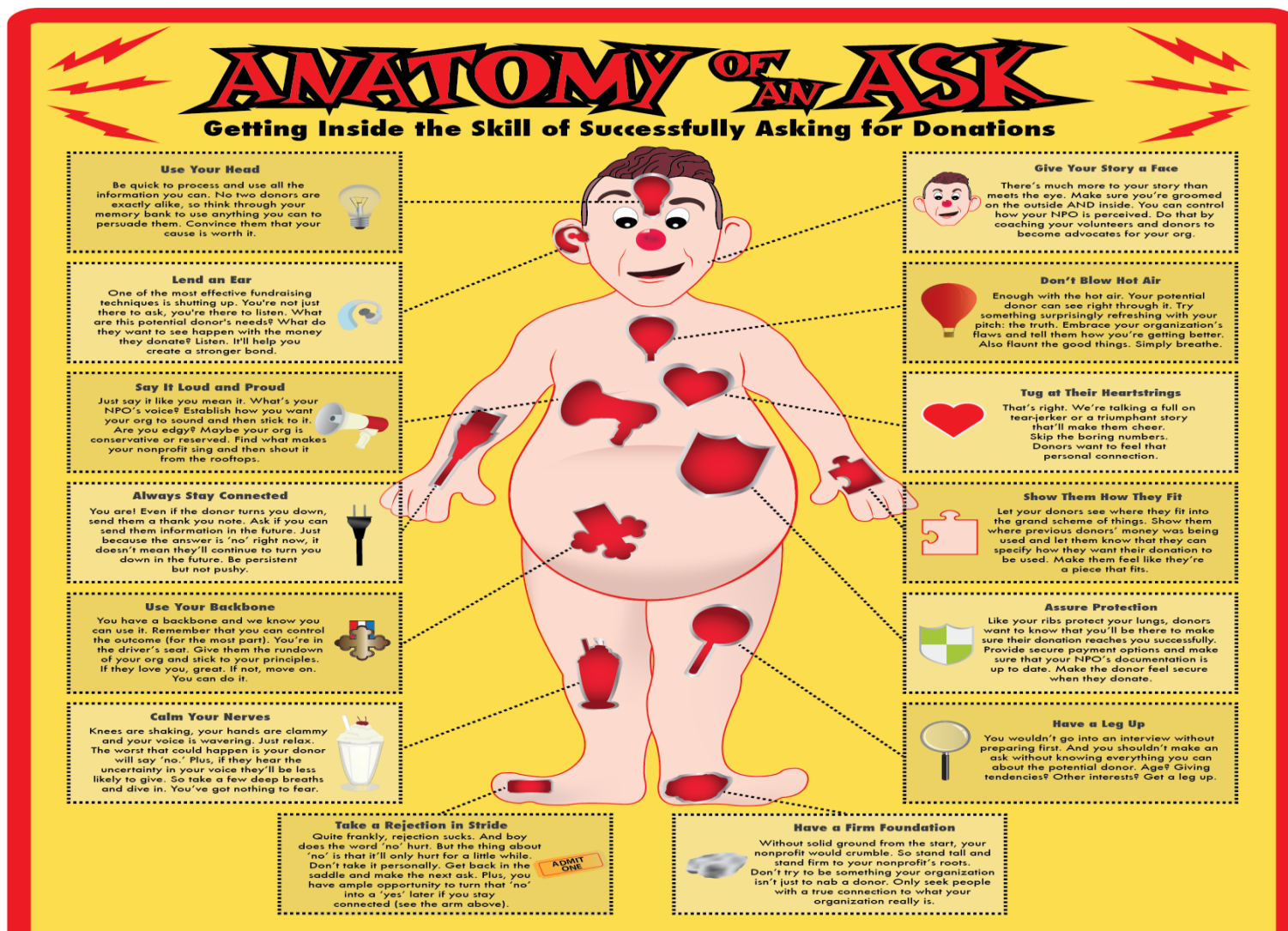
(or share/spread the love and hugs)

- It's not about "we" did this or that. It's "you" the donor as our investor, maker of positive change, being the focus.
- Know about your donors? What is your relationship plan?
- Engage them?
- Thank beyond the acknowledgement letter ???
- Segment – specialized, personalized, tailored messaging/asks
- Retain & renew donors – learn from the profits –positive customer first attitude; expeditious service; knowledgeable employees
- Amazon, Apple, Trader Joe's, Netflix, Google, Marriott, UPS
- The end result = involved and loyal donors/customers

EXERCISE – the 10 minute incline

- Take 5 minutes to answer these ???
 - ▣ What are you doing to ensure “customer service”
 - ▣ Can you do more?
 - ▣ What impedes this process?
 - ▣ Are your/the staff cross-trained?
 - ▣ What can you do today to better this engagement ?

LOVE & HUGS...



LEADERSHIP



- ☐ Board
- ☐ Staff
- ☐ Volunteers
- ☐ Donors
- ☐ Clients
- ☐ Partners/Sponsors
- ☐ Grateful People
- ☐ Who are others?

EXERCISE – the 10 minute power walk

- What are the qualities of these leaders?
- List hierarchy of influence
- Whom might others be?
- From this list, who is/are the best for the following:
 - signing appeal letters
 - signing thank you letter
 - Personal solicitations
 - Campaign asks
 - Phone campaign
 - Hosting a home event

ANSWERS...

- Qualities: Lead by example, motivate, influence, passion for mission, good to great communication skills, they “give” rather than “get”, listen to/engage others
- Hierarchy – all dependent upon the circumstance
- Others... Friends -take on a Kickstarter or third party event
- From this list, who is/are the best for the following:
 - signing appeal letters – CEO, Chair, ED, Client, and/or...
 - signing thank you letter
 - Personal solicitations – define the ask goal, team follows
 - Campaign asks – same as above
 - Phone campaign – get everyone involved
 - Hosting a home event - influencers
 - Other thoughts?

DO YOU KNOW THIS ANSWER?



“How much of Robin Hood’s money went to fund-raising expenses and campaign contributions and how much actually went to the poor?”

Reprinted from Funny Times / PO Box 18530 / Cleveland Hts. OH 44118
phone: 216.371.8600 / email: ft@funnytimes.com

ANALYSIS/MEASUREABLE OUTCOMES

- Annual goals and objectives are measureable – increase annual fund by xx donors and \$\$; add xx items to the silent auction and increase net xx%; make xx personal calls weekly; etc.
- Quarterly grid – your plan – your timeline
- Appeal or event analysis – what is your ROI?
- 80/20 Rule
- Success?? The good, the bad and how to do better

QUARTERLY GRID

2016 Goal \$360,000							
Program//\$\$	Jan – Mar	Apr -Jun	July-Sept.	Oct- Dec	Cumulative	+/-	Comments
End of the Year goal: \$12,000	\$1,000 \$ 1,000			\$11,000 \$12,000	\$13,000 Met Goal	\$1,000	
Holiday Party goal: \$20,000	\$17,000 \$19,000	\$3,000 \$2,000			\$21,000 Met Goal	\$1,000	
Lapsed donor appeal goal: \$3,000	\$2,000 \$ 1,000	\$1, 000 \$1,000 Need something	Need something		\$2,000 Goal not met	(\$1000)	
Campership goal: \$15,000		\$13,000 \$10,000	\$2,000 \$4,000 Need something	Need something	\$14,000 Goal not met	(\$1000)	
Celebration goal: \$33,000		\$31,000 \$30,000	\$2,000 \$4,000		\$34,000 Met Goal	\$1,000	
Grants:ongoing goal: \$257,000	\$25,000 \$25,000	\$133,000 \$100,000 Need something	\$47,000 \$57,000 Need something	\$52,000 \$82,000	\$264,000 Met Goal	\$7,000	
Tributes,IMO, goal: \$2,000		\$2,000 \$3,000			\$3,000 Met Goal	\$1,000	
Other/ 3 rd party goal: \$17,000		\$5,000 \$6,000	\$10,000 \$15,000	\$2,000	\$21,000	\$4,000	
Goal	\$45,000	\$188,000	\$61,000	\$65,000			
Raised to Date	\$46,000	\$152,000	\$80,000	\$94,000	\$373,000		Where am I ?

FUNDRAISING VEHICLES



- Direct mail – right message, right time, right context
- Retention and lapsed appeals
- Segmentation
- Tributes, memorials, in lieu of birthday, anniversary, etc
- Monthly giving
- Acknowledgements – Yes!!
- New donor, increase donor, “recognition packages”
- Incentives/challenges/clubs/ tchotchkes

OTHER FUNDRAISING VEHICLES

- Fundraisers, mega-\$\$\$raisers, medium \$\$raisers
- Third party fundraising
- Friend-raisers, house parties, non-\$\$ engagements
- Giving Tuesday – Nov. 28th
- Campaigns -Mini or Major & the Giving Pyramid
- Personal Asks
- Grants
- Phonathons
- Thankathons

		FEB	MAY	JULY	SEPT	THIS IS YOUR EOY SECTION
1	Who was solicited	cardiac	maternity new	lapsed	< \$2500	Add EOY here
2	Date letter finished:	Jan 23	Apr 1	June 21	Aug 6	Oct 31
3	Date letter mailed	Feb 6	Apr 30	July 10	Sept 10	Nov 17
4	Number sent	1000	2000	3000	10000	
5	Gifts received	200	50	1000	1000	
6	% Returned (5/4)	2%	2%	33%	10%	
7	Income:	4000	1500	10,500	45000	
8	Average gift (7/5)	20	30	10.50	45	
9	Costs of mailing	1000	900	1500	3000	
10	Net income(7-9)	3000	600	9,000	42,000	
11	Cost per \$ (9/10)	.33	1.50	.16	.07	

MEASURING SUCCESS

Some measures:

- # donors retained vs. donors lost/lapsed

- # new donors, new volunteers

- # increases/decreases in levels of giving

- \$ dollars raised

- \$ cost per dollar raised

- program expansion, new hires, new buildings, etc.

- +/- media posts, likes, responses, etc

- +/- Media coverage

What are you comparing this to - 1 year, 2, 3, goals?

Where is there room for improvement?

VILFREDO PARETO or 80/20 RULE

- ❑ Pareto, Italian economist, 1848-1923
- ❑ Evaluate the distribution of wealth at that time
- ❑ What took :
 - 80% of your time with a 20% return?
 - 20% of your time with an 80% return?

80/20 or is it 90/10?

- Sponsorships from corporates/foundations
- Overall \$\$ goal from donors
- Our time for ROI, here's some better use of time:
 - Picking up the phone and calling donors- new, increased, segmented level, all if you have the staff
 - Scheduling 3 hours weekly to visit with donors
 - Meeting donors/prospects for coffee or lunch
 - Reaching out to cumulative and/or consecutive donors
 - Pitching to you Board, a monthly 10 minute call and/or write thank you notes to a segmented group you define

ETHICS

- Read the AFP Standards
<https://www.afpnet.org/files/ContentDocuments/CodeofEthics.pdf>
- Read Donor Rights
[http://www.afpnet.org/files/ContentDocuments/DonorBillofRights.p
df](http://www.afpnet.org/files/ContentDocuments/DonorBillofRights.pdf)
- Always do the right thing.
- When in doubt, seek advice. Ask a mentor or peer.
- If you make a mistake, own it.

DEADLY MISTAKES IN FUNDRAISING

- ❑ No PLAN
- ❑ Never (actually) asking for money
- ❑ Delayed acknowledgements
- ❑ No follow-up
- ❑ Not knowing your constituencies
- ❑ Getting pull in too many directions
- ❑ Getting in over your head i.e., watch the ROI
- ❑ Begging
- ❑ Add your own mistakes here...

FINAL THOUGHTS

- Fundraising is ongoing. It doesn't start and stop in December; or at the end of an event; or just because you got the \$1M gift or made your goal.
- If you do the same things this year as you did last year = same results. Fundraising is dynamic – shake it up!
- Tell your story - all the time. Connect emotion with results.
- Donors are your customers. Thank them more than the acknowledgement letter.
- Keep your constituents engaged all year long. Invite them to visit, out for coffee, to an event, to play goal, etc.
- Plagiarize and learn from the best. Think about those nonprofits you respect or have gobs of marketing money. Take a look at their literature, their website, call them for coffee, ask questions, mimic good standards
- Be confident in what you do. Your organization is the most deserving nonprofit out there. Be its passionate cheerleader.
- YOU are the most important person in your sphere!

QUESTIONS ???



THANK YOU!



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