

Fundraising Campaigns: The four things you need to reach your goal

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Today's Presenters



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TODAY'S AGENDA

- Campaign Overview
- Four Fundamentals
 - Vision and Case
 - Infrastructure
 - Leadership
 - Prospects and Stewardship
- Questions

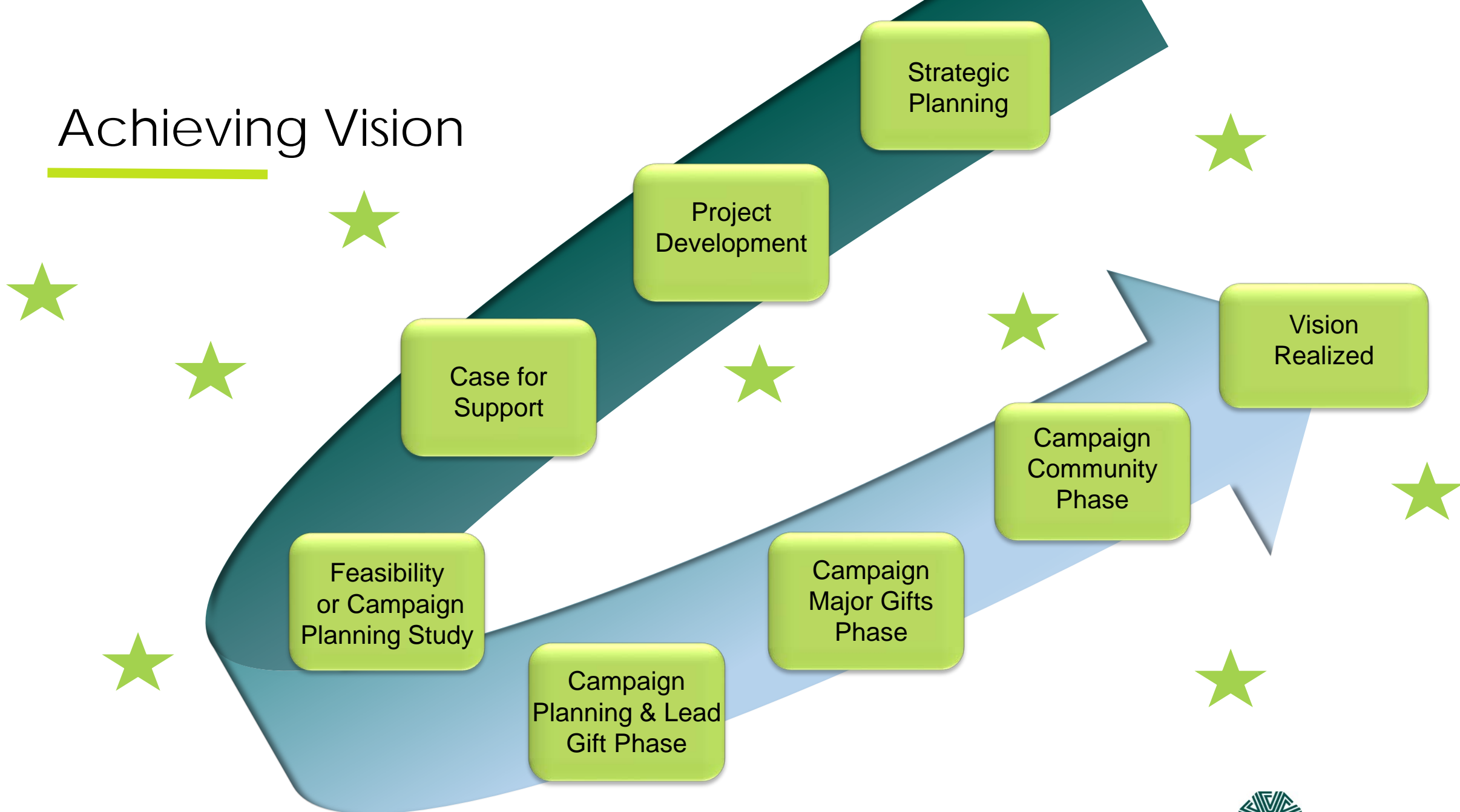
Campaign Overview

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Achieving Vision



Defining Your Campaign

Before you consider the four fundamentals, determine what campaign type is appropriate for your organization at this time:

- ❖ Capital
- ❖ Programs or special projects
- ❖ Endowment
- ❖ Comprehensive
- ❖ Major Gift program for an annual campaign



Four Fundamentals





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Four Key Fundamentals and Why You Need Them

Fundamentals:

- Vision 
- Infrastructure 
- Leadership 
- Prospects 

Outcome:

- Case
- Process
- Momentum
- Cultivation and stewardship



I. Vision and Case

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CREATE IMPACT, DEEPEN IMPACT



The Philanthropic Value Proposition

A Philanthropic Value Proposition describes the value your donors gain by supporting your cause and how they create change through your organization. A Philanthropic Value Proposition answers the fundamental question: ***Why should I give to your organization?***

“The case is an expression of the cause, or a clear, compelling statement of all of the reasons why anyone should consider making a contribution in support of or to advance the cause.”

- Harold J. Seymour, *Designs for Fund-Raising*



Be...



B

Benefit



O

Opportunity



L

Laser-focused



D

Differentiate



Purpose of the Case

- ❖ Describe
- ❖ State
- ❖ Illustrate
- ❖ Demonstrate

AFP Fund Raising Dictionary:
Case, n. the reasons why an organization both needs and merits philanthropic support, usually by outlining the organization's programs, current needs and plans.



Key Objectives of a Case

- ❖ Inform
- ❖ Inspire
- ❖ Excite
- ❖ Uplift and motivate
- ❖ Incite to action and involvement
- ❖ Instill urgency
- ❖ Invite support, interest and dedication



Four Key Fundamentals

Fundamentals::

- ✓ Vision
- Infrastructure
- Leadership
- Prospects



Outcome:

- Case
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- Momentum
- Stewardship and cultivation



II. Infrastructure

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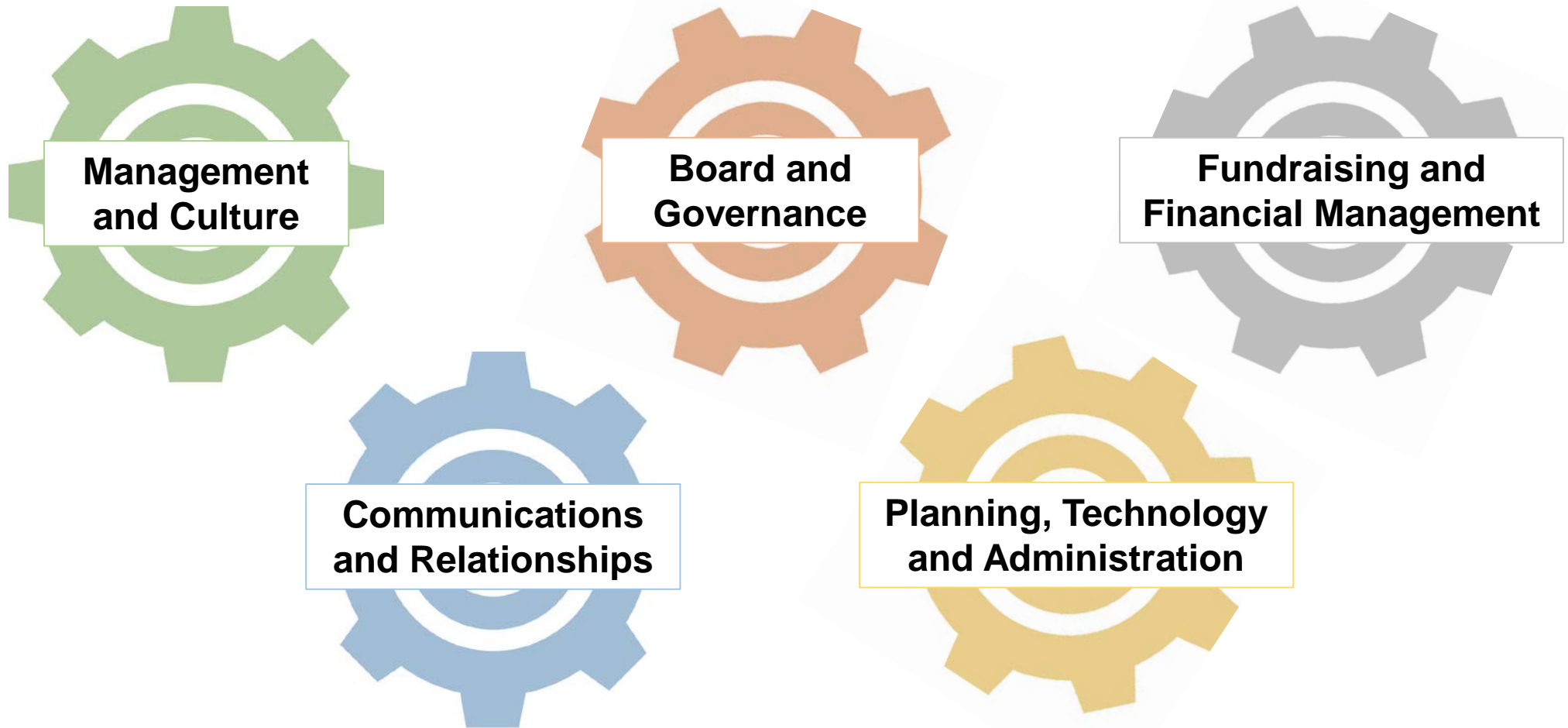


Preparedness 101

- ✓ Goal
- ✓ Budget
- ✓ Timeline
- ✓ Staffing
- ✓ Technology and database
- ✓ Policies and procedures
- ✓ Organizational support
- ✓ Partners



Nonprofit “Capacity”



Fundraising Operations

Guide to Optimal Donor Pipeline Development

Staffing

- Are roles clearly defined and training provided to staff?
- What are the optimal productivity levels and are expectations defined?
- How are you maximizing talents and curbing turnover?

Board/Volunteers

- What is the onboarding and education process for this group?
- How are assignments made and integrated into cultivation work?
- How are you inviting them to participate and invest?

Data Integrity

- Oversight of accuracy and timeliness
- Coding infrastructure
- Daily operations and cross-training

Portfolio Review

- Is current review process supporting optimal level of work?
- What systematic identification process is in place for new prospects?
- How is this process operationalized and who is supporting/monitoring this work?

Stewardship



- How and when are donors thanked?
- How do you recognize your donors?
- What makes the foundation memorable?

Continuous Improvement Plan



Four Key Fundamentals

Fundamentals::

- ✓ Vision 
- ✓ Infrastructure 
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Outcome:

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III. Leadership

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CREATE IMPACT, DEEPEN IMPACT



Leadership, Leadership, Leadership!

- ❖ Volunteer Involvement and engagement is KEY!
- ❖ “People Give To People”
 - Those with meaningful involvement will provide support and be key ambassadors for your project
- ❖ Key linkages to prospective funders and volunteers need to be identified and cultivated
- ❖ With sincerity and consistency, staff leadership needs to keep good people meaningfully involved



Volunteer Leadership and Training

- ❖ Does your board understand the fundraising and development process?
- ❖ Is your board knowledgeable about its role and expectations in the development process?
- ❖ Is your board representative of the constituencies you want to reach?
- ❖ EVERY board member is an Ambassador for your organization and campaign



Build and Maintain Momentum with Leadership

- ❖ Identify and recruit core group of invested stakeholders for campaign committee
 - Leverage Feasibility Study volunteer oversight or leadership committee members energy and interest
 - Provide early hooks and opportunities for engagement, and build their excitement as ambassadors and the campaign's early donors
 - Bring them in as part of campaign milestone celebrations
- ❖ Use feasibility study external interview findings and campaign committee to identify Top 50 prospects



Leadership Profiles

1. CONNECTOR

These individuals know how to work a room, ask the right questions and listen for opportunities that may be leveraged to benefit the organization. These Board members often raise their hands to be greeters at events, help identify and generate lists of potential supporters or host small group gatherings. They enjoy bringing people together and understand effective networking.

2. STORYTELLER

These individuals illustrate the mission and impact of the organization in a compelling way. They bring the work of the organization to life through their compelling articulation of how the organization is making a difference in the community and in the lives of people.

3. VISIONARY

These individuals are strategic thinkers who know how to best maximize and position the organization for the future. They talk the language of return on investment and help donors understand why and how their support creates value for the organization and community.

4. CLOSER




These individuals understand the process of engaging with potential donors and determining the best way to make the asks. These Board members enjoy meeting with donors, overcoming objections, sharing their stories and asking donors to join them in supporting the organization.

*Adapted from Fall 2009 edition of [Guild Notes – Carlo Cuesta](#)



Four Key Fundamentals

Fundamentals::

- ✓ Vision 
- ✓ Infrastructure 
- ✓ Leadership 
- Prospects

Outcome:

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IV. Prospects and Stewardship

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CREATE IMPACT, DEEPEN IMPACT

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Organizational Readiness

What must be in place *within the organization* for a major gift to occur?

- ❖ Unifying and aspirational vision
- ❖ Board/Staff synergy
- ❖ Strategic imperatives reflecting a strategic plan
- ❖ Outcome measures/ability to articulate outcome measures

What must be in place *within the donor* to prompt a major gift?

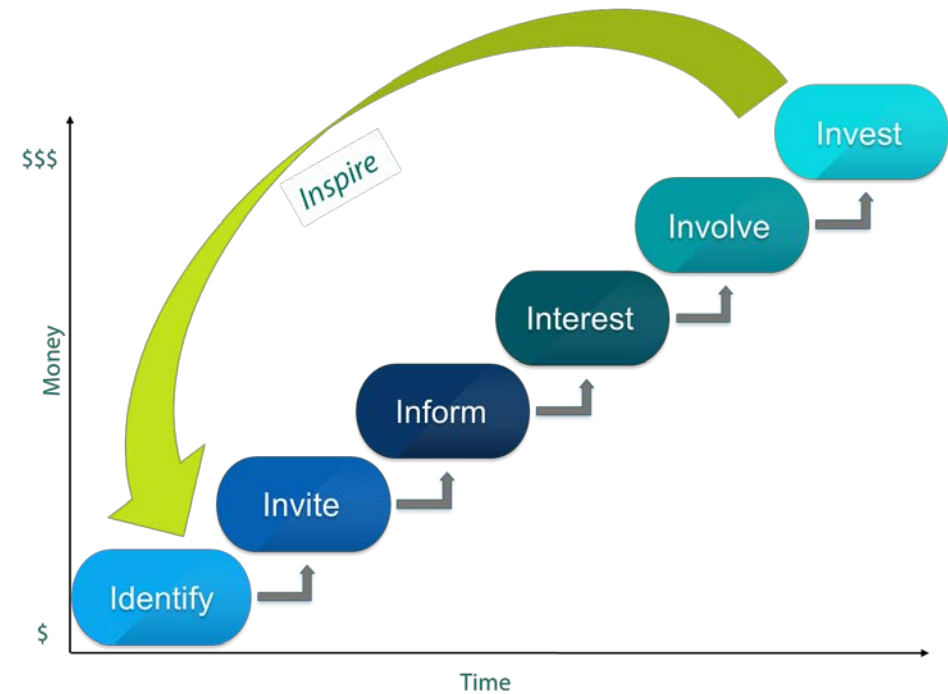
- ❖ Alignment with values
- ❖ Ability to self select through engagement strategy
- ❖ Feeling of stewardship
- ❖ Perception that their gift is truly important
- ❖ Perception of legacy with lasting impact
- ❖ Philanthropic reciprocity



The Seven “I”s of Fundraising

- **Identify:** Learn about the prospect’s gift potential, level of interest, connections to other supporters and support of similar causes, etc.
- **Invite:** Invite the prospect to take a small action to learn more your organization.
- **Inform:** Over time, inform the prospect of the uniqueness of your organization’s work, impact and role in the community and its funding needs. This takes place through repeated personal contact, as well as through informative special events and collateral.
- **Interest:** Help the prospect decide that initiative is important to him/her. When the prospect begins asking questions, making comments or offering suggestions it is clear that he/she is ready to be involved.
- **Involve:** By attending a meeting, making some calls, giving input on the initiative, co-hosting a social gathering, joining a committee, etc., the prospect signals that he/she is personally committed.
- **Invest:** If the prospect has truly passed through all the phases, then he/she will participate financially to the limit of his/her capacity and interest. If the prospect is rushed through the process, the gift will be smaller than it might have been.
- **Inspire:** Once the prospect becomes invested, he/she will be inspired to cultivate others in the same manner.

The Seven “I”s of Fundraising



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Lead Gift Phase

- ❖ The “Top Ten” Rule
 - Your top ten supporters will provide 90% of your funding
- ❖ Identifying the Top 50 for a lead and/or principal gift
 - Who has supported you in the past?
 - Who of your donors are your best prospects?
 - Based upon mission, services and benefits, who should be interested in the organization?
 - Who are your natural constituencies?



Major Gift Stages

1. IDENTIFICATION

The first stage to major giving is finding potential donors. This stage is important because the quality of your prospect list will determine the effectiveness of your subsequent fundraising efforts. Usually, this starts with looking for anyone who has made a significant gift in the past or contributed to a like organization. Using this data, identify prospect activity and new opportunities for securing a significant gift.

2. RESEARCH

The research stage is where biographical information comes into play. To know that your proposal will be successful, you need to know as much as you can about the prospect, including their relationships, their work history, their religious and community involvement, their education and giving history. It is critical to have a data management system that can capture a robust set of useful information.

3. STRATEGY

Once you've done the groundwork, assign a relationship manager to manage the prospect from stage to stage. Determine the major giver's current and future position to give, including their funding purpose, the expected amount and date you should ask for the gift. Your strategy will involve planning 5-7 actions designed to guide the prospect towards giving.

4. CULTIVATION

This is where all the data you collected in your research pays off, as you will use it to tailor and personalize interactions. Any interaction that you have with the potential major donor, such as a supporter engagement event, phone call, email or a meeting, should be entered on that donor's record. You can update where the donor is in the giving cycle (and whether they will move on to the next stage).

5. SOLICITATION

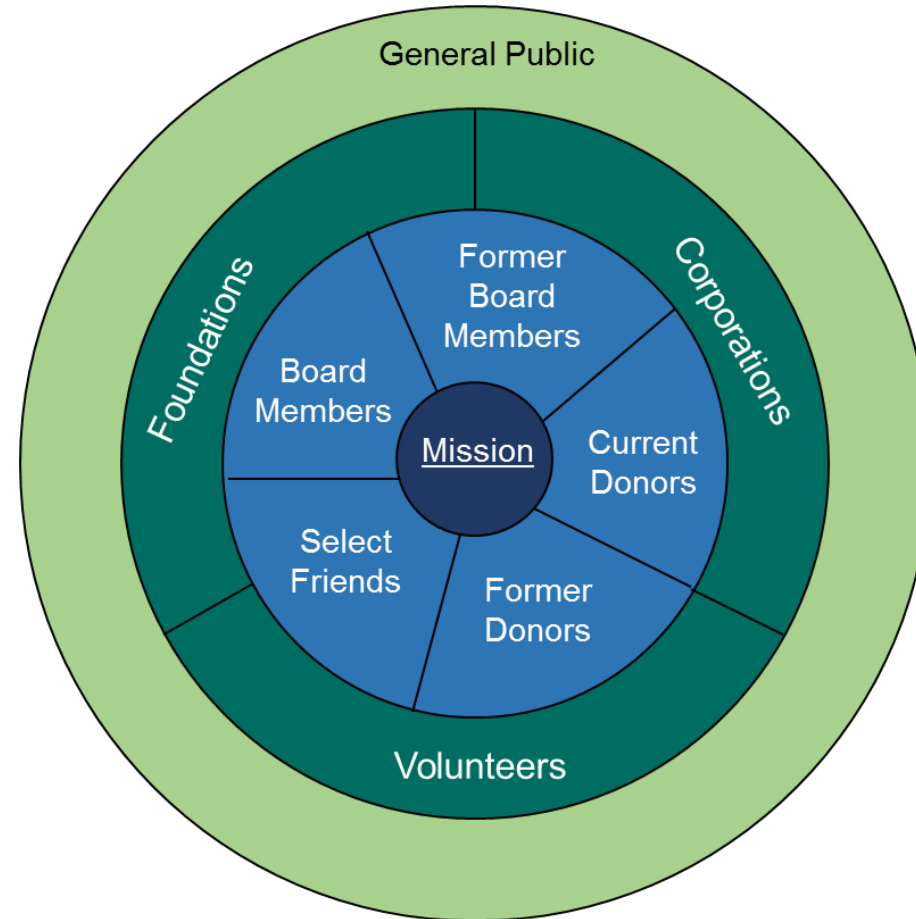
Once your prospect has passed through the cycle and reached the solicitation stage, arrange a meeting to ask the donor to invest in your organization's mission. Invite appropriate leadership and volunteers, and prep appropriately. If the presentation or proposal is successful, you will need to create a gift record which can be linked to the proposal.

6. STEWARDSHIP

Your prospect is now a Major Donor! Create a stewardship plan of actions linked to the proposal, starting with a recognition for the gift (e.g. a thank you letter or call from the CEO). Formalize how the major giver would like to be contacted so you can share updates on the impact of their gift. Send stewardship reports, invite them to events and maintain a solid relationship in the hopes your donor can pass through the prospecting cycle time and time again!



Identification



Cultivation and Stewardship

- ❖ Individualize each prospect
- ❖ Be donor-centric in your approach and consider:
 - Giving history and past gift designations (if any)
 - Points of contact and/or access
 - Strength of relationship
 - Perceived potential
- ❖ When crafting the solicitation, consider:
 - Current knowledge of case
 - What will inspire them to do the extraordinary



Prospect Management

- ❖ Hold a rating session with key volunteers
- ❖ Establish a tracking system
 - ✓ “Moves” Report
 - ✓ Contact Reports
- ❖ Focus and don’t bite off more than you can handle
 - ✓ Start slowly with a small number
- ❖ Develop specific strategies around each of your prospects
 - ✓ Make strategic “matches” with each component of your project
- ❖ Be disciplined
- ❖ Evaluate regularly



Community Engagement Phase

- ❖ Celebrate the campaign's progress through media channels and engage broader community offering many ways to participate:
 - ✓ Direct Mail
 - ✓ Phone-a-thons
 - ✓ Staff campaign
 - ✓ Memorials
 - ✓ Special Events
 - ✓ Social Media
 - ✓ Planned Giving



Four Key Fundamentals

Fundamentals::

- ✓ Vision →
- ✓ Infrastructure →
- ✓ Leadership →
- ✓ Prospects →
- ✓ Fun →

Outcome:

- Case
- Process
- Momentum
- Stewardship and cultivation
- Positive energy



Questions & Answers



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Upcoming Webinars

Diversity: Rewiring your donor engagement strategies
Tuesday, October 29, 2019 at 2pm ET

Happy Halloween: Don't get spooked!
How to create a strong development plan to drive fundraising success
Thursday, October 31, 2019 at 2pm ET

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Thank You!

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