FROM MEMBERS TO DONORS

FUNDRAISING ABOVE AND BEYOND

, SEPTEMBER 13, 2019

PRESENTED BY

KATIE LORD

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PROOF POSITIONING INC.
Who am I?

Katie Lord
Vice President of Nonprofit Development, Proof Positioning

Katie has a strong background in nonprofit fundraising and development:

+ development planning
+ marketing
+ major gifts fundraising
+ board development
+ Strategic Planning

Katie has worked for a number of major nonprofit organizations including:

Katie is a graduate of the University of Kansas with a B.A. in Psychology
Your donors give with emotions and emotions are what we measure

We answer your organizations Burning Questions using emotional data

Create Emotionally Resonate messaging to increase membership, increase donor retention, raise more money, develop deeper relationships

Work with nonprofits, foundations, associations and corporations

Get PROOF.
Session Objectives

➢ Developing your organization’s **Story**
➢ Asking for **Support** of your organization’s mission
➢ Sustaining Fundraising through Engagement
➢ Providing **Stewardship** of gifts
Charitable Giving Today - Giving USA 2019

2018 contributions: $427.71 billion by source of contributions (in billions of dollars - all figures are rounded)

- 68% Individuals: $292.09 billion
- 18% Foundations: $75.86 billion
- 9% Bequest: $39.71 billion
- 5% Corporations: $20.05 billion
Charitable Giving Today - Giving USA 2019

2018 contributions: $427.71 billion by type of recipient organization
(in billions of dollars - all figures are rounded)

- 2% To Individuals $9.06
- 2% Unallocated Giving $6.53
- 3% Environment/Animals $12.70
- 5% International Affairs $22.88
- 5% Arts, Culture & Humanities $19.49
- 7% Public-Society Benefit $31.21
- 10% Health $40.78
- 12% Gifts to grantmaking foundations $50.29
- 12% Human Services $51.54
- 14% Education $58.72
- 29% Religion $124.52
Fundraising isn’t all we do........
Developing Your Organization’s Story

➢ Every organization must have “Brand Story”

➢ Realistic, relevant, impact and emotionally rich

➢ Describe how a supporter can make community be part of the solution while helping organizational met organizational

➢ Include personal stories!!!!!

➢ All organization ambassadors/Influencers must communicate key consistent messaging (Repetition)
Developing Your Organization’s Story

- Mission
- Vision
- History
- Programs and services
- Needs
- Story
Developing Your Organization’s Story

- Everyone involved with the organization - staff and volunteers - should have a “Brand Story"
- Short and simple way to define your organization's purpose and needs
- Internal vs. External Audience
- Practice makes perfect
- Don’t be shy about using it!
Developing Your Story

Breakout Session Small Groups

Create Organization's brand Story

Share in small groups

Share with audience
Revenue streams beyond membership dues/fees

1. Board Giving
2. Annual Fund/Annual Giving
3. Sponsorship
4. Special Events
5. Project-Based
6. Major Gifts
7. Planned Giving (such as bequests)
Board Giving

➢ 100% giving/pledging sends a message to the public that your organization’s own leadership is **fully behind fundraising**

➢ It is expected

➢ Can influence others and their level of giving...or whether or not they give a gift at all

➢ Empowers them to fundraise (more valid to ask others for a gift after you’ve made your own)

➢ Establish baseline in Job Description
Prospecting: Circles of Influence

- Community
- Work
- Neighbors
- Friends
- Family
- Self
Annual Fund/Annual Giving

- Supports the annual operating budget - Year Round
- Uses a variety of solicitation methods
  - Traditional
  - Let’s get Social
- Establishes giving patterns, preferences, data
- Can be used to feed major gifts pipeline
- Examples and IDEAS!
Top 10 Ways Members Can Contribute to Fundraising

➢ Make Friends for the Cause
➢ Identify Your Organization's VIP Friends (Very Important Prospects)
➢ Open the Door with Prospects
➢ Invite to Membership Meetings or Community events
➢ Become a Tour Guide (and show how your organization changes the world)
➢ Acknowledge a donor’s generosity
➢ Spread word via technology
➢ Practice articulating the case (use your “elevator speech”)
➢ Take time to see the mission work of the organization
➢ And last but not least: Make a gift.
Project-Based/Campaigns

- Fundraising around a specific, one-time need
- Funds are designated to this purpose
- A defined timeframe for fundraising (typically shorter)
- Higher Goals
Sponsorship

- Specific Event or Annual for organization
- ROI for Donation/Gift
  - Examples
  - Reporting
- “On Brand”
- Have Fun with it! More unique the better!!
  - Experience
- Multi-year agreements/Renewals
Special Events

- Can support operating budget or special projects
- Include Members and external
- "friend-raising" and introducing your organization to others
- Labor-intensive/monitor ROI
- Timeline, budget, volunteers
- Capture participants and put them into pipeline
Major Gifts

Sample Giving Pyramid

Occasional Givers and Event Participants

Annual/Recurrent Givers

Major Givers

Planned and Deferred Givers
Major Gifts

➢ The amount considered to be a Major Gift varies from organization to organization

➢ Limited in number, but not so few that they are nonexistent

➢ The “ask” is a process – long cycle
  1. Prospect/Research
  2. Cultivate
  3. Solicit
  4. Steward
Planned Giving/Deferred Gifts

➢ Largest Gifts/Lasting Legacy
➢ The Sweet Spot
➢ Vehicles
➢ Long Game- Never to Early
➢ Stewardship, Stewardship, Stewardship
Successful Solicitations Include:

- Make an appointment and plan your approach.
- See your prospect in person
- Go in pairs
- Tell your Story and express need/project
- Ask Leading Questions
- Listen more than you talk
- Take Notes
- Leave behind materials and written request
- Set up the next Steps
Stewardship

➢ Acknowledgment of gift and IRS tax receipt

➢ Celebrate Milestones

➢ Creative and Frequent Recognition
  ➢ Phone Call
  ➢ Handwritten Thank you
  ➢ Social media
  ➢ Printed materials

➢ Beware of “Thasking”

➢ Must thank 5-7 times before next ask
The Thask

Thask you may, but Thask you should not.
A Thask is not the way
To get what you want.

What is a thask?
Your wondering mind asks...
Well my friend, I'm so glad you asked.

A thask is a serious offense!
A thask is thoughtless!
It may even cost you your friends!

A thask is lazy!
Some may even say cheap!
It loses friends that you want to keep!

A thask is not one thing, but two-
It's saying, thanks for all that you do!
While asking again a moment too soon!

It takes away anything sincere
And makes one feel like
They are not very dear.

So do you see why one may view a thask
To be a very unproductive task?

Do you see how many friends you could lose?
In the short amount of time
It takes to tie your shoes?

Instead of mixing them up,
And squeezing them in a space too tight.
You should slow down
And take the time to thank them right.

They when maybe a day has passed,
You can approach them
With a very nice ask.

By Stephanie Vorhees
Measurement + Benchmarking

➢ Set achievable goals
➢ Measure progress toward those goals
➢ Review ROI (manpower and expenses vs. return)
➢ Vital to course correction, so do it along the way
➢ Quantitative analysis
Buy In

➢ Make a plan – secure leadership approval and share with members
➢ Outline the values, ethics and standards for resource development
➢ Define the functions, competencies and skills necessary to carry out the plan and the appropriate structure for success
➢ Explain commitments needed from staff and volunteers doing their part in achieving this fundraising success
Questions?

What are you going to do tomorrow as a result of this presentation?
Thank You!

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