



nadace
partnerství
| LIDÉ A PŘÍRODA






US
embassy

FUNDRAISING BEST PRACTICES

Cultural Differences?

Pre-Survey | You Said (Your Top 3)





Interest in Various Types of Fundraising Programs

• Campaigns	58.6%	
• Major Donor Programs	58.6%	
• Online Fundraising	44.8%	
• Annual Giving	41.4%	
• Membership Program	41.4%	
• Special Events	27.6%	
• Matching Gift Programs	24.1%	
• Bequests/Planned Gifts	17.2%	
• Corporate Fundraising	3.4%	

*Today's
workshop will
focus on Types
of Fundraising
Programs*

Pre-Survey | You Said (Your Top 3)

Working with Donors

- Identifying New Donor Prospects 72.4% 
- Working with Corporate Donors 51.7% 
- Increasing Donor Giving 48.3%
- Making The Ask 48.3%
- Retaining Existing Donors  37.9%
- Donor Communications 31%
- Stewarding Donors  20.7%
- Cultivating Prospects 20.7%

A separate workshop will cover Best Practices in working with donors. Will take questions today, however.

FUNDRAISING BEST PRACTICES

Today's workshop format....

Compelling Stats

Fundraising Concepts

Donor Stories

Quotable Quotes

Case Studies

SHARE & COMPARE
EXPERIENCES & STORIES

Meet the pros who shared their “know how” with you...

Dwight Clasby

Evann Coadd

Noelle Delage

James Dunn

Jennifer Hopper

Cheryl Kisling

Misa Lobato

Dana Rinderknecht

Susan Swan Smith

Pam Terch

Andrea Wagner

Lyn Woods



...and who generously shared experiences from the following organizations

- University of Colorado (multiple campuses)
- Denver Hospice
- The Salvation Army
- Tennyson Center for Children
- Community College of Denver
- Colorado Gives | Community First Foundation
- North Texas Giving
- Friends of the Pueblo Animal Shelter
- Fort Tryon Park Trust, New York
- Marymount International School (Rome)
- The Lincoln Center, New York
- The Anti-Defamation League
- The Denver Art Museum

WORKSHOP GOAL

Everyone leaves with 'just one bright idea' or 'seed of an idea' to consider implementing



First—A quick and important discussion...

“The mutually agreed European General Data Protection Regulation (GDPR), will come into force on May 25, 2018. It will change how businesses and public sector organizations can handle the information of customers.”

How will the upcoming GDPR impact your organization?

FIRST....LET'S TALK ABOUT WHAT A FUNDRAISER DOES

How do you see your role?

The All-Important Mindset

Some fundraisers think their job is to ask people for money.

But, it's not about asking for money.

It's about...

- presenting an opportunity to have an impact

- giving people a chance to **save lives**, to

- change lives**, to **change the world**

You Help Donors Do Great Things

They give **through** your organization to:

Change lives.

Relieve pain.

Right a wrong.

End injustice.

Add to the world.

Give back.

What do donors get in return?

A feeling—the personal gratification knowing they did something good.

A donor's heart isn't filled with money.

It's filled with passion.

And that's what you have to tap into, dear fundraiser.

Think of yourself as a match-maker in the **INSPIRATION** business.

PRIVATE GIVING

Just how significant is it?

A few compelling statistics.

Private Fundraising

Take a quick guess.

What % from each source?

(Of total U.S. giving?)

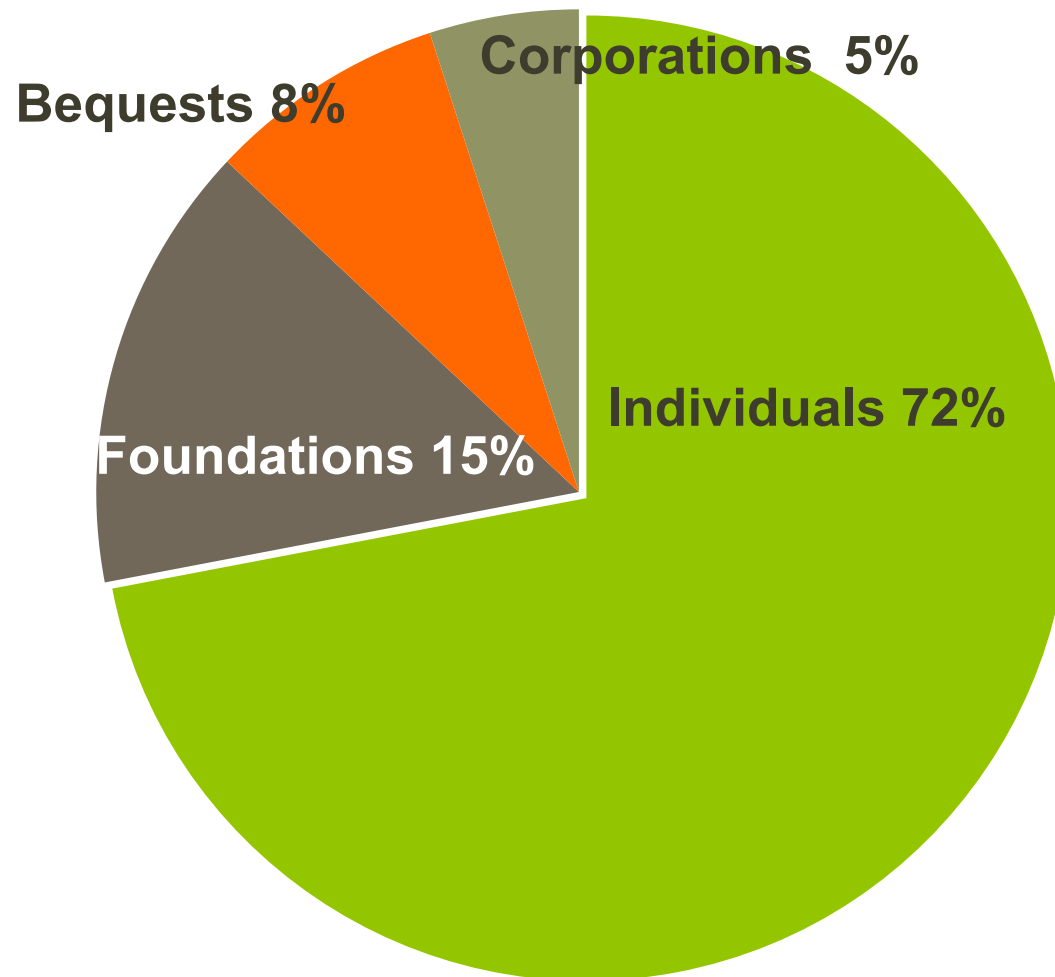
(excludes public sources)

- Foundations ____%
- Corporations ____%
- Bequests ____%
- Individuals ____%



USA Total Giving 2016 | **\$390.05 Billion**

Sources of Philanthropy



- Individuals
- Foundations
- Bequests
- Corporations

Giving by individuals drove the increase in total giving to an all-time high.

It is, by far, the most important part of giving.

*Giving USA 2017

Who is Giving?

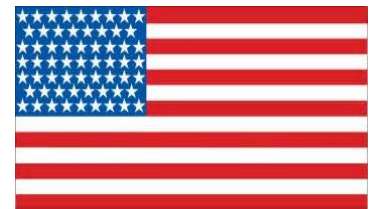
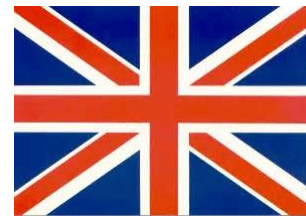
Czech Republic

- Super rich contribute 1/3 of all giving
- Remaining 2/3 are donors from medium and low-income brackets
- Almost 1/2 of lowest income donors are pensioners



U.S. and UK

- 80% of the total \$ of all charitable gifts are made by the richest 5% of the population
- Two-thirds of all households contribute to charity



Giving in the Czech Republic

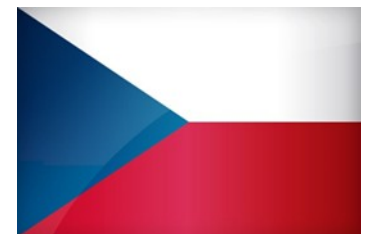
“In general, this country has not reached the same level in number of donors or amounts given as in most west European countries.

Although things are improving, this may be more of a problem of the organizations seeking donations rather than the donors.

...the biggest obstacles for Czech to give [to charity] is that they are not asked enough, and they are not asked well enough.”

-Jan Kroupa, Czech Fundraising Center

Do you agree?



DONOR BEHAVIOR

What can we learn by studying donors?

-

Philanthropy and Young Czech Entrepreneurs



Martin Hausenblas
Ústí nad Labem

“I made so much money, which I don't need, and the time has come for me to start thinking about others too.”

Is this typical of the growing number of young Czech entrepreneurs?

Are they in fact turning to philanthropy?

Specific Findings

EUROPEAN Donors

39% of European donors are Gen Xers (1965-1980)

67% are female

70% are ideologically liberal

European Gen Xers give more to...

- human and civil rights (**23%**)
- animals and the environment (**20%**)
- international development (**19%**)...*more than any other Gen X donors worldwide.*

European donors...

- prefer to give online (**57%**)
- most inspired by give by Social Media (**29%**)
- **least likely to attend fundraising events (38%) yet find them inspiring**
- **have a low volunteer participation rate relative to other regions (64%)**
- **less inclined to prioritize in-person interaction with favorite NPOs**



The logo consists of three icons: a green leaf, a red heart, and an orange paw print, followed by a blue plus sign.

Nonprofit Tech for Good

Work at a Nonprofit, NGO or Charity?

If yes, then please participate in the [2017 Global NGO Technology Survey](#)! Thus far, 3,100 nonprofits, NGOs, and charities worldwide have taken the survey. We need 1,900 more by November 1. Please volunteer 5 minutes of your time and participate. The survey is available in Arabic, English, French, Portuguese, and Spanish. Thank you!

[Take the Survey](#)

You are invited to take the survey!
Only 11 non-profits from CZ have participated thus far.

Giving by Generations | The West

Traditionalists (Before 1945)

- Generous, many have become today's major donors as they have aged.

Boomers (1946-64)

- Giving less than Traditionalists at the same age. May be because they are less religious.

Gen X (1965-76)

- Smaller generation overall by sheer numbers.

Gen Y- Millennials (1977-95)

- Less likely to give and tend to give less. Largest generation of all.

Cultural differences?

Younger generations are passionate about a “cause”—older generations are loyal to an organization. *Giving USA 2017*



Donors Give to Many Causes

“Donors have a constellation of passions.”

Donors over 70 Give to average of 11 organizations

Baby Boomers Give to an average of 7 causes

Donors under 50 Give to average of 5 causes

*US Bank, Study of High Net Worth Philanthropy

“90% of donors single out one particular cause for special support.” —Penelope Burk

“What might this mean to your organization?”

3 Things Donors Say They Need

1. Prompt, personalized acknowledgment of their gift
2. Know their gifts have been put to work as intended
3. Information on results or the impact their gift is having

In other words, they want **ongoing**,
meaningful information—about their gifts.

Critical to donor retention

Giving and Volunteering Go Hand-in-Hand

Volunteers tend to give more (private actions)

Wealthy individuals who volunteer gave 56% more than those who did not volunteer.



True in Czech Republic?

TYPES OF FUNDRAISING PROGRAMS

Campaigns*

Major Donor Programs*

Online Fundraising*

Annual Giving

Memberships

Special Events

Matching Gift Programs

Bequests

Corporate Fundraising

CAMPAIGNS

What experience have you had?

Best Practices to share?

What is a Campaign?

You may be wondering....

”How is a campaign different than regular fundraising?”

Good Question.

A campaign is a *focused* fundraising effort.

- Specific need or opportunity
- Specific monetary goal (usually significant amount)
- Raise money by specific time.

Campaign Basics

So now you may be also wondering....

Are there different types of campaigns?

Yes, depending on why you are raising money.

Types of Campaigns

- Endowment
- Capital
- Major Gifts
- Small-Mid Size Gifts
- Annual Fund
- Crowdfunding

Types of Gifts

- Restricted (specific purpose)
- Unrestricted (no purpose)

But the basic campaign concepts and principles remain the same.

What Our Experts Had to Say

Campaigns

“I’m not a fan of campaigns. People don’t give because you are in a campaign. They could care less. They give to a cause.”

“You have to carefully analyze the reason (the why) behind a campaign. Some initiatives are just not conducive to campaigns.”

“There may be too many campaigns today. Some organizations end a campaign only to start another. We are beginning to see campaign fatigue.”

Four Phases of a Major Campaign

Major Campaigns sometimes take years.

Phase 1 PLANNING

Getting Ready

Long 'to do' list...
Goals
Priorities
The "Case"
Leadership
-Cabinet
Database

Phase 2 SILENT

Testing the Waters

Feasibility Study
Leadership
Gifts

Phase 3 PUBLIC

Let the World Know

When 75 - 80% of goal has been raised, go public. Let your success breed more success.

Phase 4 CLOSING

Celebration

Celebrate and Thank All Who Made a Difference
Stewardship begins...



CAMPAIGNS

Best Practices

These are the essentials of a successful campaign.

Let's look at each in more detail.

- Feasibility Study
- Campaign Chair/Co-Chair
- Volunteer Leadership
- 100% Board Participation
- Compelling Vision (Case)

CAMPAIGNS

Best Practice

Feasibility Study

“If people talk to you about a feasibility study, they will talk to you about a gift.”

Why conduct a feasibility study?

- Assess image of your organization
- Determine if goal and timeline is realistic
- Test the strength of your “case”
- Identify potential major donors and campaign leaders
- *Determine the likelihood of success*

Side Benefits

- Helps presell the campaign
- Strengthens relationships

CAMPAIGNS

Best Practice

Feasibility Study

“You are trying to find out if there is sufficient support...”

Top Things to Ask | Feasibility Study

1. Experience with organization
2. Attributes of board and staff
3. Quality of programs and services
4. Understand the need and agree that campaign is necessary
5. Believe the goal can be reached
6. Support you can expect from community
7. Recommend individuals to serve as volunteer leaders
8. **If they are willing to help--in what capacity**
9. **Others who might have the financial capacity for a significant gift**
10. **If they (or their company) will support such a campaign**

CAMPAIGNS

Best Practice

Campaign Leadership

Campaign Chair
Co-Chair &
Other Volunteer
Leadership

“The campaign chair/co-chair must be someone with the right connections and influence.”

“A successful campaign truly takes a village—it is essential to line up the right people to help.”

“One of the reasons for a feasibility study is to identify others who can help.”

“You might get lucky to have a famous person lend their name and reputation—but that’s a bonus. “

“We asked every board to make a leadership gift at the outset of the campaign—it was expected.”

“Training volunteer leadership is absolutely critical—they must be inspired and prepared for their role.”

CAMPAIGNS

Best Practice 100% Board Participation

“Board members will be better at asking potential donors if they give themselves.”

“There must be a very clear up-front understanding of a board member’s fundraising responsibilities.”

“Major donors will ask if board members have given—you can expect this.”

“We asked every board to make a leadership gift at the outset of the campaign—it was expected.”

“We also asked our board members to host house parties or other events.”

BOARD GIVING

Best Practice

“Having 100% board participation in board giving sends a strong message to prospective donors.”



- Noelle Delage

Introduce a “giving” expectation for board members. They should give back because they want to serve the organization.

Everyone on the board should give—period. In the amount of \$500-\$1000 (minimum) to start.

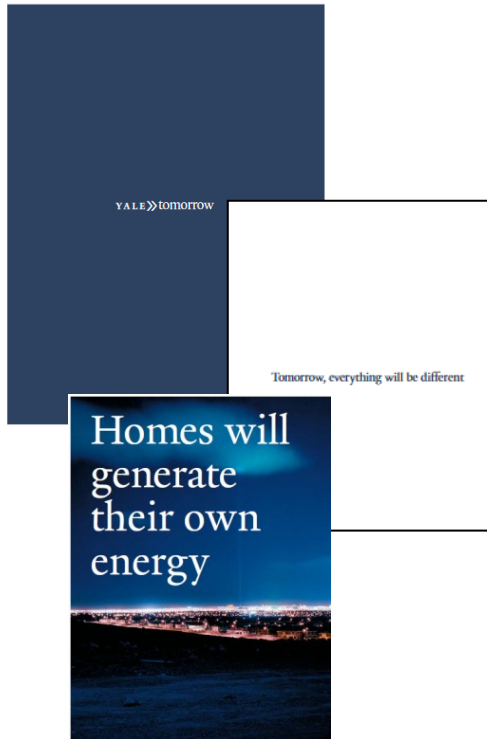
“Time is not the same as money—you can’t ask people for money if you don’t give yourself. Don’t call it dues—and it is not a bill.”



CAMPAIGNS

Best Practice

Compelling Vision (The Case)



The Case Statement is Meant To....

Connect donors with an interest.

Enchant. **Shock.**

Engage donors in a cause they value.

Your case statement needs to put forth a vision and explain in clear terms...

Why this is worth doing?

Why us?

Why now?

Why you?

MAJOR DONOR PROGRAMS

What experience have you had?

Best Practices to share?

What is a Major Gift?

Research has shown that people see themselves as having made a major gift if they donate \$500 to \$1,000.

Cultural differences?

MAJOR DONOR PROGRAMS

Best Practice Relationship Strategy

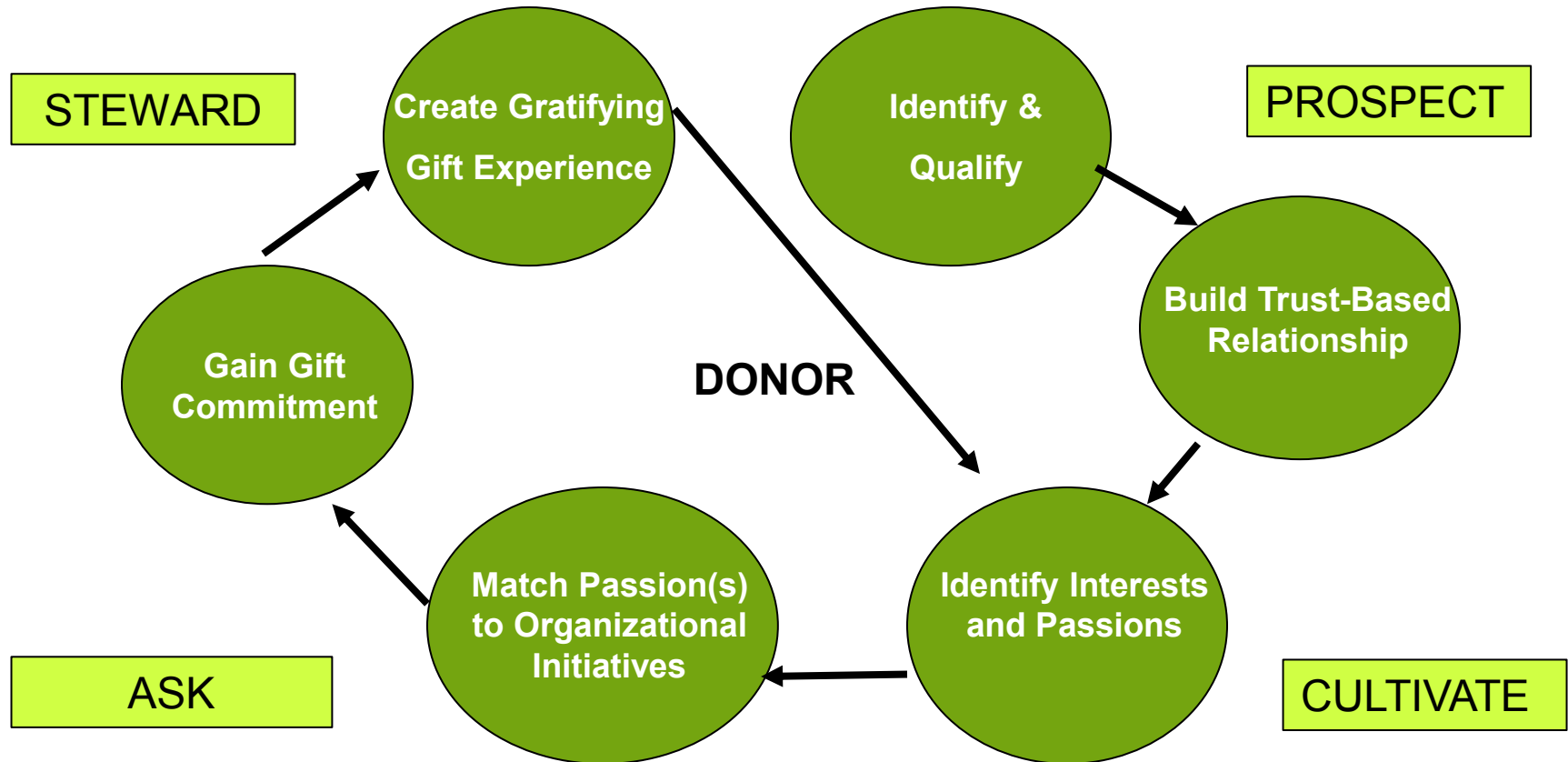
“What happens is that you connect with donors personally. It is a true relationship.

No matter what happens...it leads elsewhere in life.”

--Lyn Woods

- **Active management** of individuals thought to have potential by an assigned development officer (or team).
- **Long and short term strategies** developed.
- Get to know the donor (passions and interests). Gradually **engage them** until the time and opportunity is right for an “ask”.
- Continue to steward them (other gifts often follow.)

Key Concept | Donor Engagement Cycle



The second workshop will focus on each step in detail.

Key Concept

Donor Commitment Continuum

Unaware Aware Interest Experience Participation Ownership

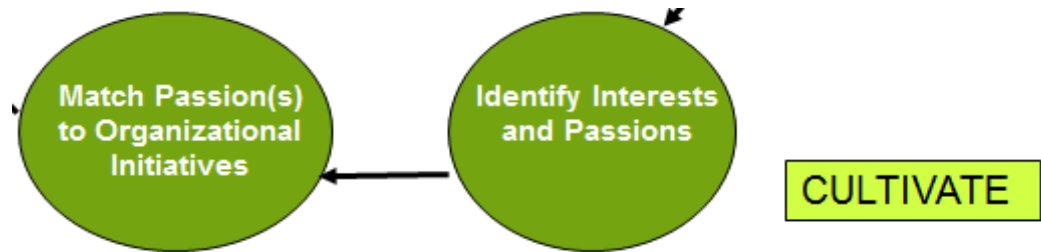

Every major gift prospect should be staged along this continuum.

A personalized strategy should be developed
to move the donor to the right
until the time and opportunity is “right” to make the ask.

MAJOR DONOR PROGRAM

Best Practice

As you get to know your donor, start thinking about how to match their passions and interests with the needs of your organization.



The “all-important” question to ask your donor or prospect

“What would you like to do with your money that would be meaningful to you?”

Then, sit back and listen...

MAJOR DONOR PROGRAMS

Best Practices

Build Strong
Relationships

“The relationships I’ve built with my donors are deep and personal and extend beyond our work at the non-profit.”

--Lyn Woods

- **Build Relationships**
(it’s not about transactions)



“Is this
all I am
to you?”

- **Follow the Donors’ Passions**
“Donor Driven...Donor Centric”
- **Ongoing, meaningful communication** (Show them the impact of their gifts—the difference they are making)

MAJOR DONOR PROGRAMS

What Our Experts Had to Say

Part 2 of the workshop will focus on how to work with major donors.

“I find ways for my donors to be actively involved. This usually builds commitment.”

“Keeping good notes on a donor is critical—especially when there is a long-term strategy and change of staff.”

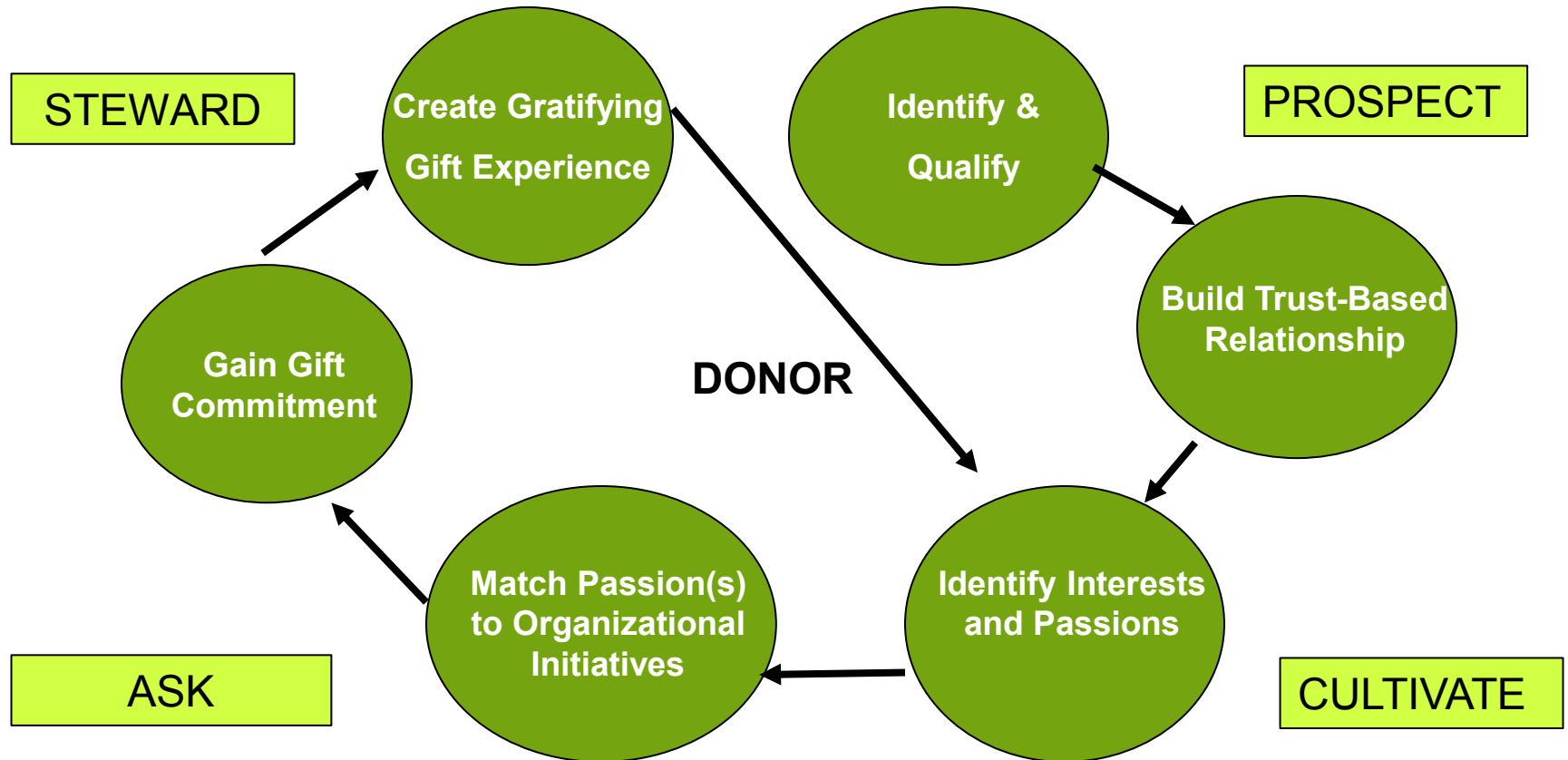
“The gift is not complete until we can honestly say the donor understands the impact they’ve had.”

“You need to understand the donor’s interests and values before you ask for a major gift.”

“Two minds are better than one—a team approach can be very valuable in developing a strategy for major donors.”

“Scheduled meaningful contacts that move the relationship forward...is key.”

Key Concept | Donor Engagement Cycle



The second workshop will focus on each step in detail.

I don't think you ever stop **GIVING**.
I really don't.

I think it's an ongoing process.

And it's not just about being able to write a check. It's being able to touch somebody's life.

--Oprah Winfrey

ONLINE FUNDRAISING

What experience have you had?

Best Practices to share?

Online Giving

A Small but Growing Piece of the Pie ^{*U.S.}

Online Giving as % of Total Giving



“Only 25% of online giving may be charitable in nature (meaning recognized non-profits)—especially with fast evolving crowdfunding.”

-Pew Research Center

“Though online giving is relatively small today, within the next 5 years things will be massively digital.”

-Network for Good

Donors worldwide prefer to give online

Donors worldwide prefer to give online—
true across generations

- **62 %** of millennials and
- **59 %** of Gen Xers and Baby Boomers prefer online giving.

Of online donors,

42 % cite social media as the tool that most inspires them to give;

And of these donors,


62 % list Facebook as most inspiring channel,
followed by **Twitter** (15%) then **Instagram** (10%).

Websites and email addresses donors trust most?

.org (72 %), .edu (7 %), and .ngo (6 %)



After 20 Years Email Finally Reaching Potential



Dear Marlene,


Being proactive gives many of us an energetic things done and tick off those tasks in our lives that same 'just do it' energy can flow when you begin setting up future financial and estate goals.

Today you'll meet Corrie West, who set up a financial plan that ensures her loved ones know her wishes and her intentions are spelled out, and I've made these decisions calm."

We want to be here for you when life is calm and also when it's not. If you have questions about planning for your future, we're here today.


University of Colorado Gift Planning

P.S. Learn how to **ace will planning from the comfort of your home.**




This is the power of development at UC. Corrie already knows how philanthropy can be a powerful experience. She has personally supported UC. Gift to support UC.

[Read more >>](#)



SUPPORT OUR FIELD TRIP CIVIL WAR EDUCATION



[Donate Now](#)

Dear S.,

I have the perfect job. I'm obsessed with American history and not only in the field, but everything I do—everything we do together—goes toward something meaningful—the preservation of hallowed ground.

The last we save together is not just for us, however, it's for future generations, from use, and cherish. To become an informed citizen, it is essential to [American history happened](#). In running our little education department make sure to keep in mind.


This is precisely why we created our [Field Trip Fund](#), which sends kids to battlefields and historic sites. While our animated maps, virtual tours, e-books, and classroom curricula are key pieces of the educational puzzle, better than the real thing—sneakers on battlefields; kids experiencing it. And we have and can make this happen very efficiently; just \$20 will send one student to a battlefield or a historic site.

This fund has helped send more than 14,000 students and chaperones in outdoor classrooms that tell the story of our great country. Students reach from guides and get the opportunity to walk in the footsteps of their ancestors.

Today, we are asking you to help us [give students the educational experience](#). As this project has grown in popularity, we are finding it harder to fund. We are currently rejecting more than 60% of the field trip applications we receive.

I appreciate any help you can offer. Please support the [Field Trip Fund](#) today to give students across America the opportunity to visit our battlefields.

Sincerely,
Garry Adelman
Director of History and Education




Dear Marlene,

Thank you so much for your generous donation in support of AARP Foundation's disaster relief fund to support the victims devastated by Hurricane Harvey. As people work to recover from the massive destruction caused by the rain, wind, and flooding, your gift will make a difference for those in need.

AARP Foundation will work with organizations to provide relief to disaster victims in affected regions. Because you gave today, AARP and AARP Foundation will match your contribution dollar for dollar up to a total of \$1 million.

Thank you again for your emergency gift. Your receipt is below for your records.

With gratitude,



Lisa Marsh Ryerson
Lisa Marsh Ryerson
President, AARP Foundation

AARP Foundation is a non-profit 501(c)(3) charitable organization. No goods or services were provided to you in consideration for your generous contribution. Your contribution is tax-deductible to the extent allowed by law. This letter serves as your official receipt and acknowledgment of the contribution and should be kept with your tax records.

Transaction Summary

Transaction Date:	8/31/17
Amount:	\$50.00
Billing Information	
First Name:	Marlene
Last Name:	Stjernholm
Street 1:	12128 Beach Blvd
Street 2:	
City:	Westminster
State/Province:	CO
Zip/Postal Code:	80234
Email Address:	marlene.stjernholm@gmail.com
Communication opt-in:	Yes
Payment Information	
Payment Method:	Credit Card
Credit Card Number:	www.aarp.org
Credit Card Expiration:	
Credit Card Name:	
Total Gift Amount:	\$50.00
Transaction Amount:	\$50.00
Transaction ID:	2068-5203-1
Tracking Code:	



Hurricane Harvey Relief

For each dollar you donate, Walmart will match **twice** its value up to \$10 million.


[Give today](#)

Get the latest on Hurricane Harvey support



[Read more](#)

Join us in helping Houston animals.



[Donate now to Houston SPCA](#)

Hurricane Harvey has created an unprecedented catastrophe for people and animals in Texas. [The Dumb Friends League is committed to helping our shelter partner in Houston—and we hope you'll do the same.](#)

Crowdfunding

Does Your Cause Have Crowd Appeal?

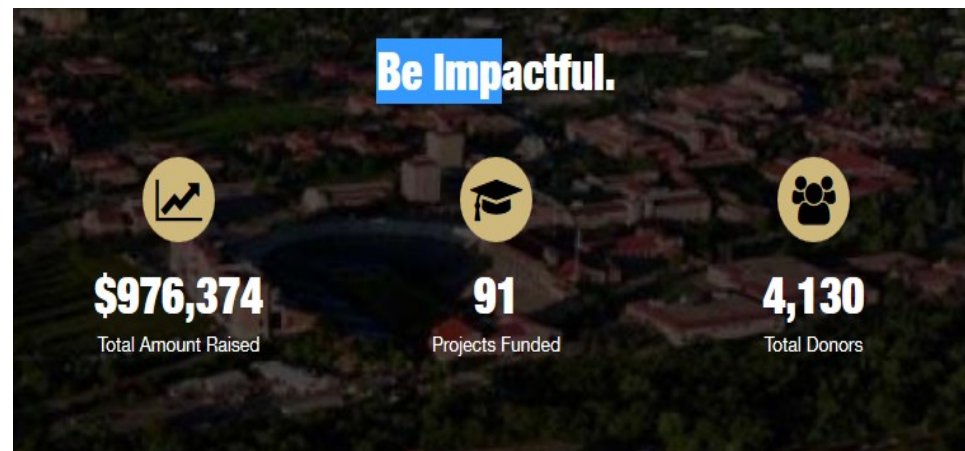
"You will be as successful as the amount of work you put into the campaign."

—Evann Coad

Crowdfunding is not a "post it and forget it proposition."

The screenshot shows a crowdfunding campaign page for 'CU-CRC Scholarship Scooter Trip' on the Boulder Crowdfunding website. The page features a video player with a 'PLAY' button, a progress bar showing 223 supporters and \$24,685 raised, and a list of donors including Susan Rosenbach, Margo Behler, Cassie Roach, Naancy Voss, Dora Ley, and Shannon Anderson-Armstrong. The campaign goal is \$30,000.

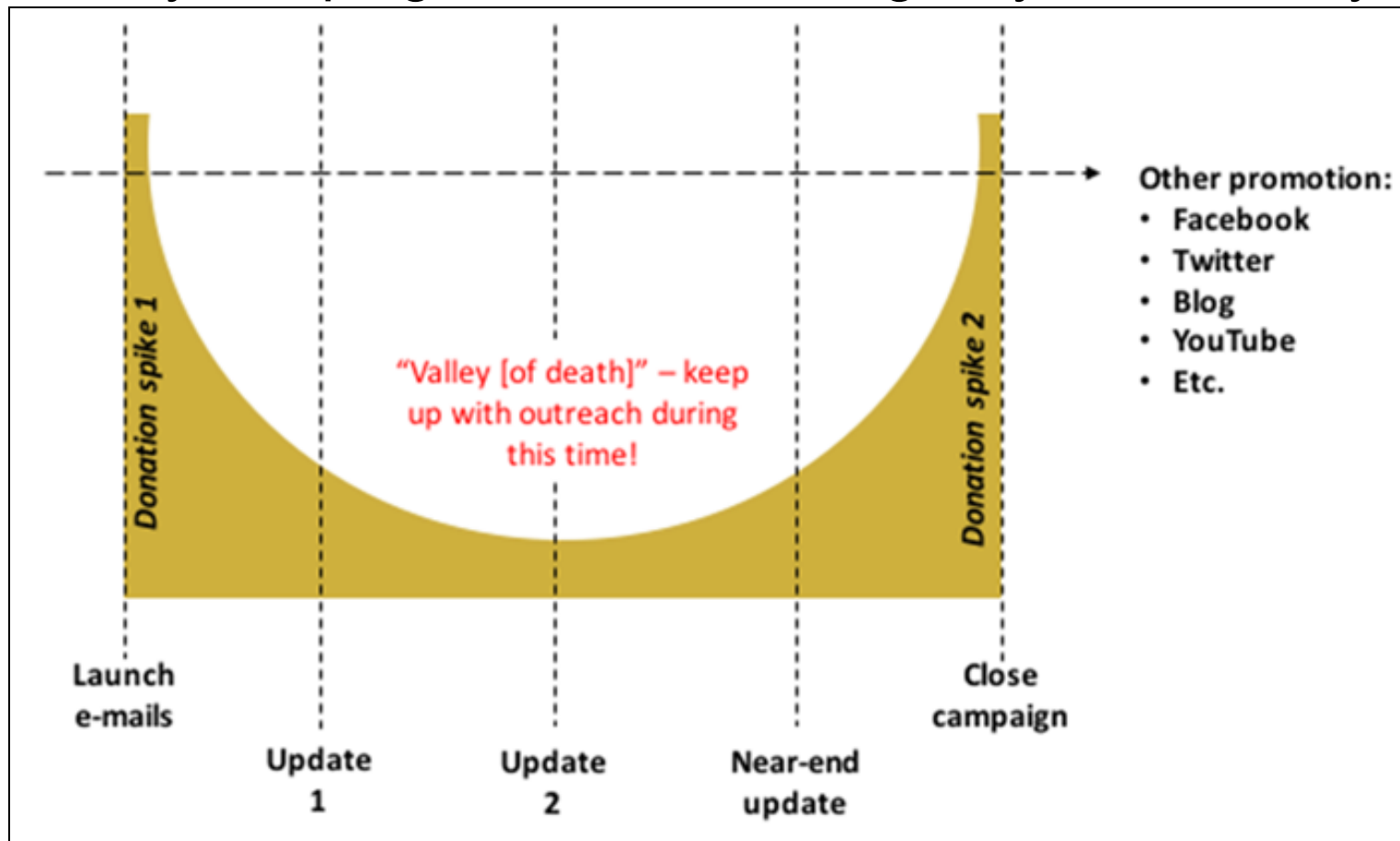
Let's take a peek at a few of [CU Boulder's crowdfunding campaigns](#).



Crowdfunding Campaigns

Expect and Overcome the Valley of Death

The campaign time span is critical. Creates a sense of urgency. A 90 day campaign doesn't have urgency—but 30 days does.



CROWD FUNDING

Best Practices

Crowdfunding isn't just 'set and forget.' It requires work--boots on the ground.



Evann Coad

- General metric—reach out to 8 people for every \$20 you want to raise.
- Lead people to your campaign—email works best. (*Email 53% conversion; Facebook 12% conversion*)
- Short videos (less than 3 minutes) most effective
- Send updates every 5 days or so
- Leverage your own personal network to make first gifts. Others more likely to donate once you have 40% of goal.



A Case Study in Online Giving – Colorado Gives


COLORADOGIVES.ORG® ABOUT ▾ COLORADO GIVES DAY ▾ DONATE ▾ VISIT KIDS FOR COLORADOGIVES
our giving site just for kids! →

GIVE where you LIVE

ColoradoGives.org is your year-round online giving website.

Discover and support organizations that are essential to protecting and nurturing quality of life in Colorado. Brought to you by **Community First Foundation** but fueled by the people of Colorado.

Connect With Us:  

 FIND A NONPROFIT

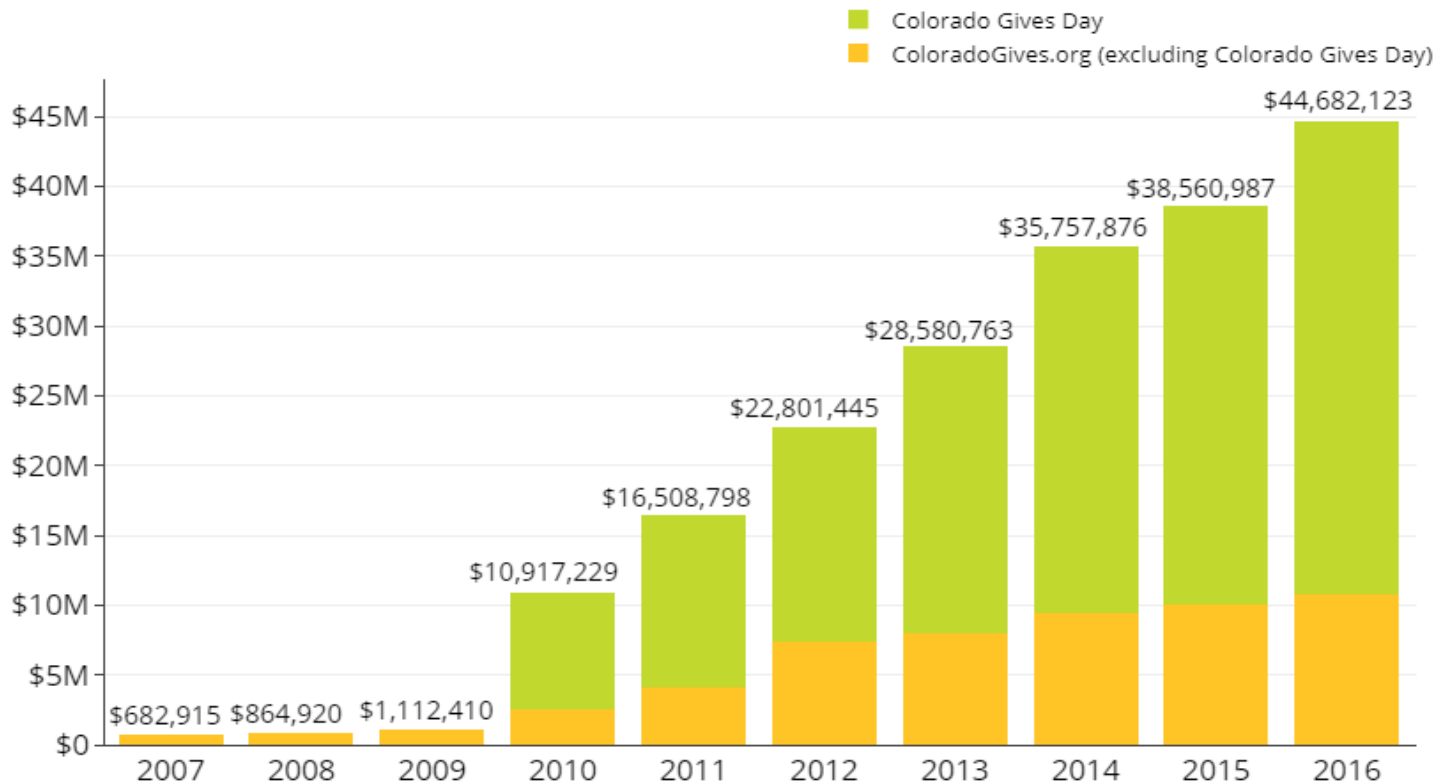
By Name or Keyword By Location By Cause

Colorado Gives

Online Giving Success Story

Dollars Donated by Year

- \$200,469,466 donated since the inception of ColoradoGives.org in May 2007.
- 15.9% increase in dollars donated from 2015 to 2016.



ColoradoGives.org | Full Year Giving

COLORADOGIVES.ORG 2016 Online Giving Snapshot



A program of Community First Foundation



ColoradoGives.org | GIVES DAY

COLORADO GIVES DAY 2016 Snapshot



AMOUNT DONATED FOR CO GIVES DAY

\$33,846,836

of donations

146,645

of donors

52,982

of nonprofits participating

2,140

\$ 231 Average donation

\$ 100 Most common donation

\$ 65 Median donation

Average raised per nonprofit **\$15,816**

Largest single donation **\$1,480,000**

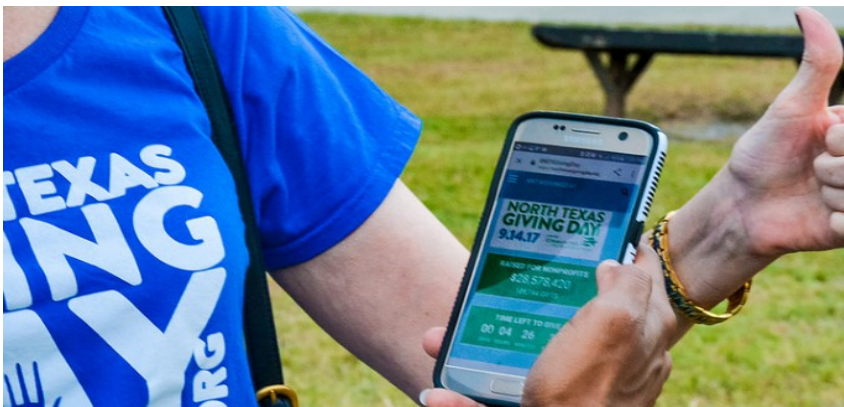
Largest # of donations by a single donor . . . **108** donations to
107 nonprofits

North Texas Giving Day



Texas has a *one-day* event.

New!
This year...
Donation Stations



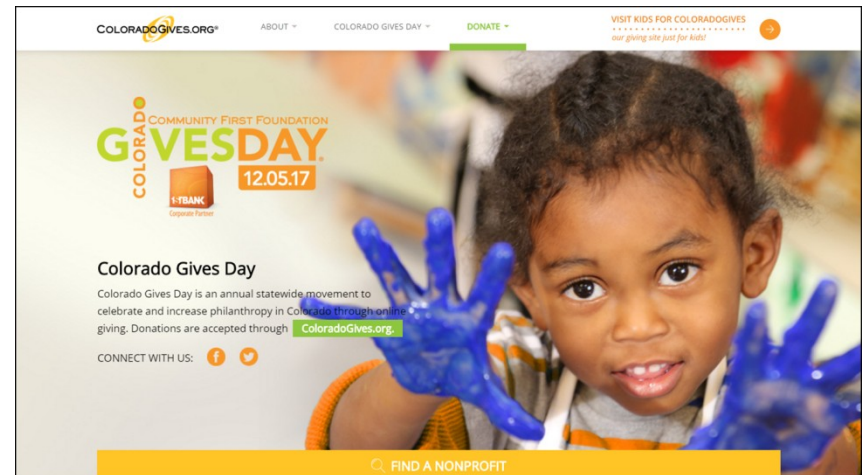
A Case Study in Online Giving

2017 Colorado Giving Day Incentive— A Staggering \$1 Million

The \$1 Million Incentive Fund created by the partners is one of the largest giving-day incentive funds in the country.

*Proportional distribution...
not a \$1 for \$1 match.*

Big growth expected in peer to peer fundraising for Giving Days.



Kids For Colorado Gives *New!*

Developing the Next Generation of Givers



The screenshot shows the homepage of Kids for Colorado Gives. At the top, there is a navigation bar with the logo 'Kids for COLORADOGIVES.ORG®' on the left, and links for 'About -', 'Kids', 'Parents', and 'Giving eCard' in the center. On the right, there is a green 'Cart' button with a shopping cart icon. Below the navigation bar is a large hero image of two young girls smiling. Overlaid on the image is a yellow and teal graphic that says 'Welcome to Kids for Colorado Gives!'. Below this graphic, the text reads: 'A fun place to learn about Colorado charities and donate online. Connect with nonprofits, find out about the good work they do, and learn why they need your help.' At the bottom of the page, there is a yellow search bar titled 'Who can I help?' with two search options: 'Search by Name or Keyword' and 'Search by Cause'. The first option has a text input field with the placeholder 'Search by Name, Keyword, or Zipcode'. The second option has a dropdown menu with 'All' selected. A teal 'Search!' button is positioned to the right of the search fields.

Kids for COLORADOGIVES.ORG®

About - Kids Parents Giving eCard  Cart

Welcome to Kids for Colorado Gives!

A fun place to learn about Colorado charities and donate online.
Connect with nonprofits, find out about the good work they do, and learn why they need your help.

Who can I help?

Search by Name or Keyword Search by Cause

Search by Name, Keyword, or Zipcode All  Search!

A Case Study in Online Giving

Colorado Gives



Dana Rinderknecht

Donors giving more *and* to more causes.

- 2600 donors gave to 10 or more non-profits.
- Up from 1100 two years ago—a 136% increase

“It’s easy I can fill my cart.”

Story of donor who filled their cart online but called to make another gift—this one for \$10,000

Bigger gifts are coming in, too

“Largest gift was \$1.4 million to the YMCA—from a bequest/trust. The donor specified in her will that the gift be made online.”

 COLORADOGIVES.ORG®

A program of Community First Foundation

Our Expert Speaks Out Online Trends

“Text giving in the U.S. is not where it should be even though some earlier obstacles have been addressed.

You can now get some donor information—and the amounts you can give via text can also be bigger.”



Dana
Rinderknecht

Trends

- Text to a number. Get return text with link to donation page on website.
- Take a picture of credit card and submit that as payment.
- Donor-paid processing fees.
- Giving recommendations *“You might like these causes...”*
- eGift cards
- Recurring donations (donor retention strategy)

ONLINE DONOR RELATIONS

CASE STUDY

Upgrading a
One time
online donor
into a
monthly
sustainer in
5 simple
steps!

Actual Example--Team Rubicon
Hurricane Harvey Response Effort

Step 1: A fabulous receipt

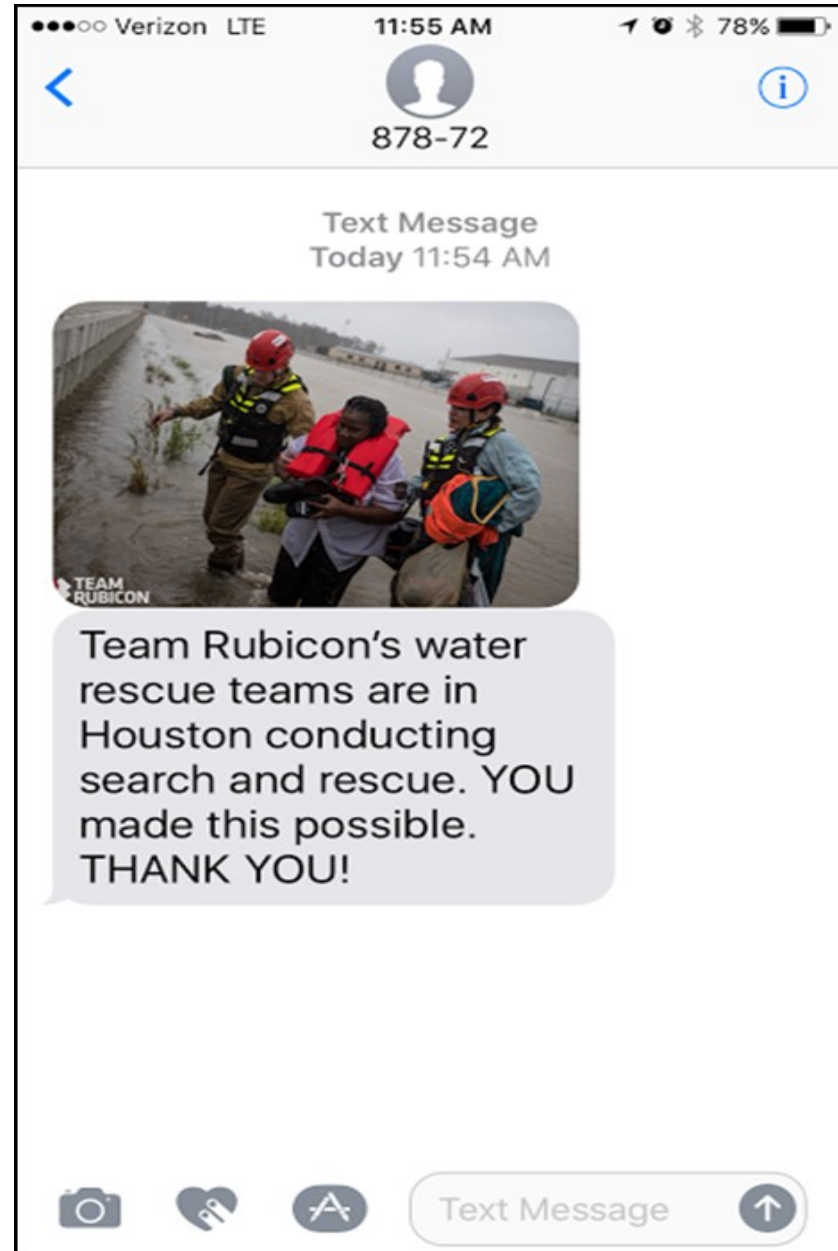
“Your gift empowers our veteran volunteers, by providing them with a sense of purpose, community, and identity through continued services to communities affected by disasters.

Thank you very much for your contribution and for being such a valuable part of the team.”

SWOON

Step 2: Impact in action

WOW- this was sent via text only a day after I donated-



Step 3:

Then a thank you email that was amazing, and honest and relatable—made you feel you really got to know Lissie

Hi Lynne,

My name's David Burke. Like many on our team, I started as a volunteer, quickly realized the tremendous impact Team Rubicon was having and joined full-time as Director of Field Operations. Back in July of 2015, we were responding to the devastating floods in Texas. More than 100 Team Rubicon members from across the country deployed to help those in need. One of those was Lissie Hagerman, an Air Force veteran.

Lissie came to help Texans in need, but ended up finding something much greater.



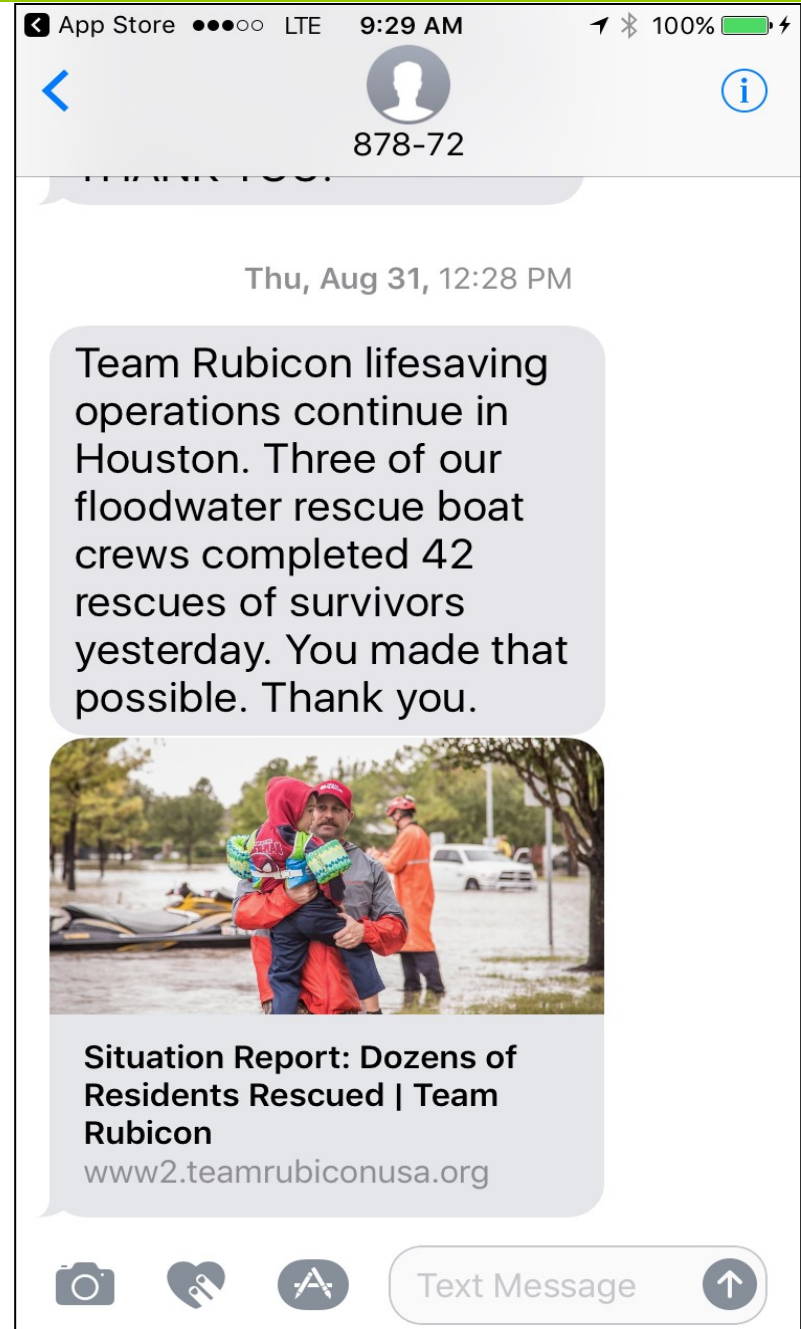
Through Team Rubicon, tens of thousands of veterans like Lissie have found that community in service. And with donors like you and the [Support Squad](#), we'll be able to continue to engage veterans and first responders in building community.

Thanks for helping us on our mission,

David Burke
Director of Field Operations

Step 4:

Two days later another impact report text- BAM!



Step 5:

Then Jon Connors showed up in my inbox- and he explained what Rubicon had done for him.

And I was moved.

I knew I had to do more.

And there it was, right there- one click. My opportunity to help was staring me in the face.

Usually I'm not a fan of impact combined with an ask but two weeks and four examples of impact, I felt I was ready.

I gave, I joined their monthly giving program

Hi Lynne,

I joined Team Rubicon in 2014 because I was lacking direction in my life. After leaving the Marines, I couldn't find that same purpose or drive in civilian life.

But after my first service project with Team Rubicon, I knew I had found exactly what I was looking for.

My journey within Team Rubicon has taken me from a volunteer to regional manager to Clay Hunt Fellow to a full-time staff position as the Region II Administrator. I've deployed to help those affected by earthquakes in Nepal and Hurricane Sandy in New Jersey.

I'm not great at talking about myself, so I figure this video is a better way to share my story with you.



My experience with Team Rubicon is not unique; there are tens of thousands of veterans and first responders who find the same sense of purpose, community, and identity that I have found in joining this new mission.

I hope you'll join the [Support Squad](#) to help engage more folks like me in Team Rubicon. \$11 a month isn't always easy, but you are making a tremendous impact on our veterans and the lives of those affected by disasters.

Jon Connors
Region II Administrator

ANNUAL GIVING

What experience have you had?

Best Practices to share?

Annual Fund

Never overlook your annual fund donors.

Study by Columbia University

Without exception, all of Columbia's top donors' (\$1+ million) made their first gift to the university within the first few years of graduation---and their gifts were less than \$100.

“If you don't have a natural constituency, it's critical to have an annual fund. You must build a base of support.”

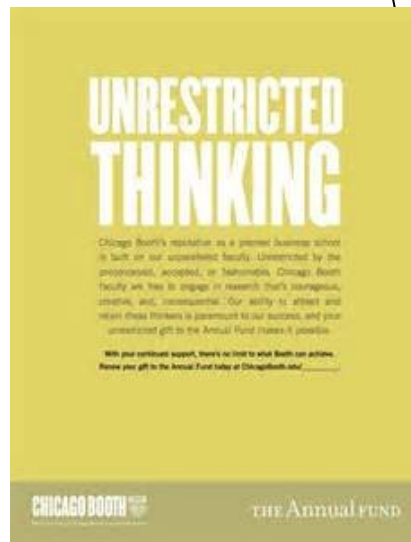
ANNUAL GIVING

An annual campaign establishes regular giving habits in your donors.

In the U.S. most annual fund appeals are during the last few months of the year.

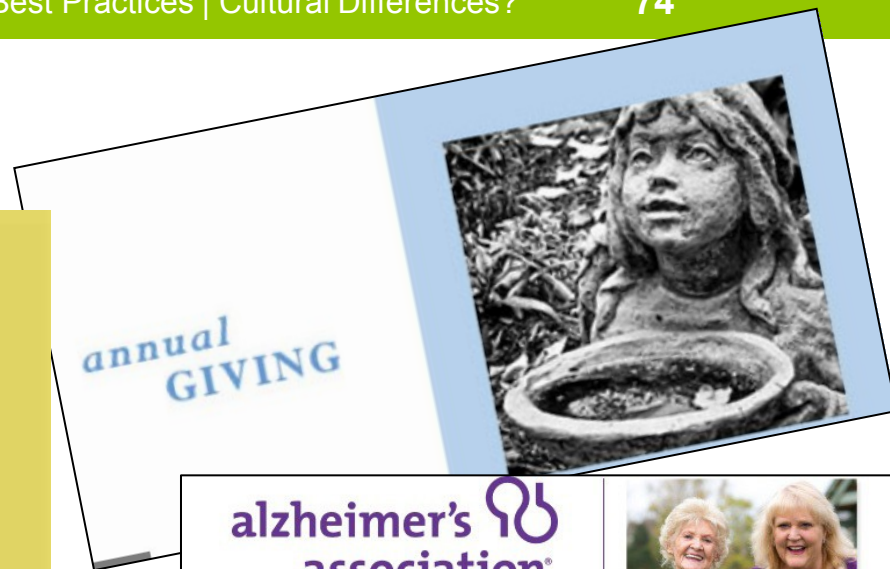
Typically multi-channel:

- Direct mail
- Email
- Social media
- Telephone



The most creative fundraisers devise smaller campaigns throughout the year.

These can be more focused both by theme and audience.





alzheimer's association®

31 W. Whipp Rd. • Dayton, OH 45459
1.800.272.3900 • alz.org/dayton

Dear Friend,

Faced alone, Alzheimer's overwhelms families, communities and our nation, but you can make a difference by doing a little BIG THING. For Irene Carpenter and daughter, Tina Medrano, their little BIG THING involved a click on alz.org* leading them to the Alzheimer's Association Miami Valley Chapter. Together with generosity like yours, we carry out our mission to eliminate the disease, provide care and support, and promote brain health.

Tina and Irene's story is reflective of so many families that we serve. Tina, Irene's 24/7 caregiver, shares, "The chapter is a Godsend. Anything we want or need has been provided." Learn more about how donations helped Tina and Irene on the enclosed card!

This fall, Irene participated in the Walk to End Alzheimer's® Promise Garden ceremony holding up the blue flower representing people LIVING with Alzheimer's. Her courage to stand up as the only "blue flower" at her Walk, inspired a young child to come and hug her. Tina said her mom loved it!

Now, Tina and Irene ask you to do a little BIG THING! Click, write a check, make a difference until we all experience, "A World without Alzheimer's." Thank you for your generous gift!

Moving the Mission Together,



Eric VanVlymen
Executive Director

2006 Irene is diagnosed with Alzheimer's

2011 Tina moves from California to Ohio as Irene needs a local caregiver

2012 Tina moves Irene into her home as she now requires 24/7 care

Tina did a Little BIG THING and clicked on alz.org*

2013 Irene and Tina join the Walk To End Alzheimer's® in hopes to end this disease!

YOU make a difference!
By participating in our 2013 Annual Appeal you are doing a little BIG THING to continue helping Tina, Irene and many others in the Miami Valley area. TOGETHER we can lead the way to end Alzheimer's disease.

Thank you!



I want to help create a World Without Alzheimer's Disease!®

Do A Little BIG THING

What Our Experts Have to Say

Annual Giving

“Consider your annual giving as your pipeline for major donors.”

“Expect complaints—but for every complaint, you get 10 gifts.”

“The attrition rate is significant—we lose almost the same number of donors that we bring in.” (Remember the ice bucket challenge?)

“Gradually increase the ‘ask’ amount—but personalize it to the donor.”

ANNUAL GIVING

Best Practices

“You need to translate operations needs into inspirational opportunities—by packaging them differently.”

— Lyn Woods

- Creatively package your appeal focusing on your mission (Examples: food for the hungry, camp for kids)
- Segmented niche messages (if possible)
- Personalize as much as possible
 - Personalized “ask” amount (based upon past giving)
 - Personalized copy to make as relevant as possible
- Multiple-channel communications
- Send follow-ups (can take 3+ messages to renew)
- Tell donors date and amount of last gift (most think they gave more recently)

Which do I open? Which do I give to?

Fundraising Appeals | Only 3 Days

Direct mail still valid (though expensive).

1% response respectable

But people are increasingly going online... to either research the organization or to make their gift.

--Network for Good



MEMBERSHIP PROGRAMS

What experience have you had?

Best Practices to share?

MEMBERSHIP PROGRAMS

“Some people want to feel like they are part of something.

A membership program can create a feeling of ‘affinity’ with the organization.”

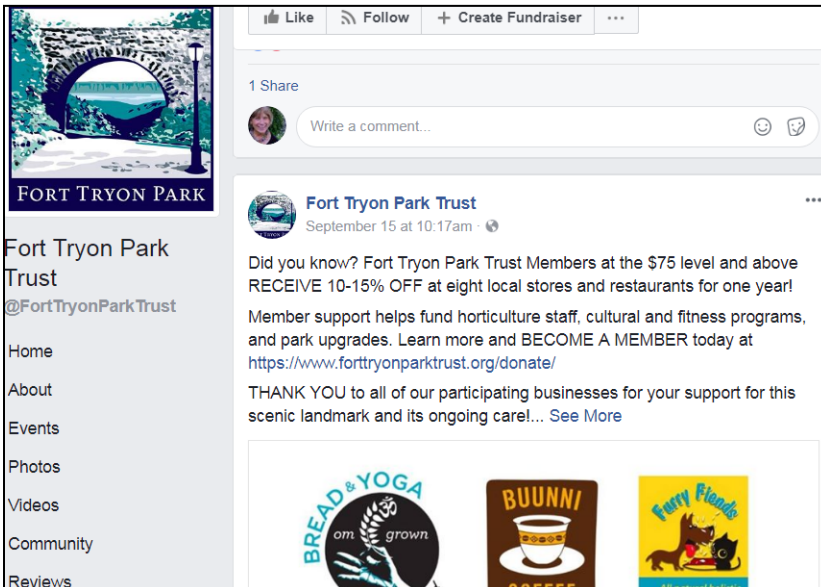
--Jennifer Hoppa, Fort Tryon Park Trust

- A type of annual fund—with benefits
- Typically supports general operations
- Right for some (not all) organizations
- Perceived “added value”
- Usually ‘tiers or levels’ of membership
- Benefits might include--
 - unlimited admission
 - ‘first to know’ communications
 - member discounts
 - member newsletter
 - members only events



Membership Has Its Benefits

- Special merchant discounts
- “First to know” about events
- Members only events
- Branded member gifts
- ...and more



Fort Tryon Park Trust
@FortTryonParkTrust

Home
About
Events
Photos
Videos
Community
Reviews

Like Follow + Create Fundraiser ...

1 Share

Write a comment...

Fort Tryon Park Trust
September 15 at 10:17am

Did you know? Fort Tryon Park Trust Members at the \$75 level and above RECEIVE 10-15% OFF at eight local stores and restaurants for one year! Member support helps fund horticulture staff, cultural and fitness programs, and park upgrades. Learn more and BECOME A MEMBER today at <https://www.forttryonparktrust.org/donate/> THANK YOU to all of our participating businesses for your support for this scenic landmark and its ongoing care!... See More

BREAD & YOGA om grown
BUUNNI COFFEE
Furry Friends



Fort Tryon Park Trust added an event.
September 11 at 1:50pm

Bring your camera and join photographer Michael Palma as you capture the park's natural assets, such as rock outcrops, foliage, trees, and plants from behind the lens. Mike will discuss nature photography strategies for dealing with difficult lighting situations, lens and zoom choice for perspective control, and composition, using the New York City scenic landmark Fort Tryon Park and its many vistas.

Please note: Space is limited to 12 people per workshop.

RSVP is required; please email RSVP@FortTryonParkTrust.org to register.

This program is supported by the Greenacre Foundation and the Fort Tryon Park Trust.

OCT 8 **Nature Photography: Fort Tryon Park**
Sun 4 PM EDT · Heather Garden · New York, NY
136 people interested

★ Interested

MEMBERSHIP PROGRAMS

Structure membership levels around what you believe is close to the giving potential of donors.

Expect giving capacity to vary.

DENVER ART MUSEUM VISIT THINGS TO DO EXHIBITIONS

MEMBERSHIP

MEMBERSHIP LEVELS

Select a level below to join, renew, or give a gift membership.

Please contact the membership office at 720-913-0130 (10 am–5 pm) with any questions or to purchase a membership over the phone.

Senior (age 65+), Student, and Teacher individual memberships are available at a discounted rate when you show proof of eligibility at a museum welcome desk. Senior memberships can be renewed by phone.

INDIVIDUAL	\$55	∨
DUAL	\$75	∨
FAMILY	\$85	∨
SUSTAINING	\$150	∨
CONTRIBUTING	\$275	∨
SUPPORTING	\$500	∨
THE MUSEUM ASSOCIATES	\$1,000+	∨

SPECIAL EVENTS

What experience have you had?

Best Practices to share?

Why Hold Special Events

- Raise visibility
- Engage supporters
- Mobilize volunteers
- Celebrate achievements
- Highlight a particular issue
- Kick off a membership or fundraising campaign
- Get names!

“The biggest predictor of an event’s success is the quality and energy of the people who work on it... and the size and dedication of your core supporters.”



“Events are hard—they are time-consuming. They are expensive and don’t always yield the results .” —Noelle Delage

SPECIAL EVENTS

Best Practices

*“Many special events are an **inefficient** way of raising money, bringing in \$1.00 for every \$1.33 spent on them.”*

—Charity Navigator

- Get clear on your real objective—raise money or other goals?
- Aim for a creative event or a new twist on an event—something with PR interest
- Over estimate expenses by 20% and underestimate revenues
- Honestly evaluate the time and effort required
- Recruit the right person to chair the event (and identify the leadership a year ahead)
- Close attention to details—create tools and processes for repeating the event
- Create corporate sponsorship opportunities

A Story of Two Galas

One Successful—One Not



Jim Dunn

The All Out Gala

- Lavish event—tickets 150 Euros
- Led by well-connected person in the community.
- Top hotel venue
- Well-known personality as MC
- Included a fundraising auction



The Scaled Back Event

- Simple cocktail reception
- Tiered pricing for tickets—from \$75 to \$1,000—you decide what to pay
- Patrons listed in program (by pricing tier)—public recognition of ticket price
- *Surprising number of people bought tickets at the \$1,000 level.*



SPECIAL EVENTS

*Look for Ways
to Leverage
the Full
Potential of
Your Event*

Three Ways to Boost Your Special Event

Peer to Peer Fundraising
Tap into your supporters' networks.
Have them fundraise for you.



“Raise Your Paw” (hand)
Direct appeal to fund specific needs
at a fundraising event.



“We missed you—but you can still help”.
Reach out to non-attendees.

Trend Alert

Hosted Small Gatherings



Noelle Delange



Jim Dunn

“You don’t want to get into the entertainment business—so this is where friends and supporters can help.”

Focused, salon-type events in people’s homes.

- Smaller, intimate gatherings usually featuring a speaker
- At the end of the evening, people asked to give.

“People say ‘yes’ to the invitation because they know the host.”

“The struggle is follow-up..”

*“There is always someone who drops
Drops \$1,000 or more into the bowl.”*



SPECIAL EVENTS

A CASE STUDY

The Mask
Project
Denver
Hospice



Lyn Woods



THE MASK PROJECT

A signature event raising over \$4.5 million for Denver Hospice.

Held bi-annually.

Celebrity-created masks are auctioned off.

Online bidding, live auction at gala.
Masks on display at major shopping center



THE MASK PROJECT

Look for extension possibilities...
ways to extend your event to other audiences.

Mask-Making Workshop for Children

The Mask Project Children's Program

During the month of May, the Cherry Creek Shopping Center will be hosting a mask-making workshop for kids in the Mask Making Project. On Saturdays, from 12-4pm, children will be invited to join in the fun of creating their own mask... and it's all complimentary.

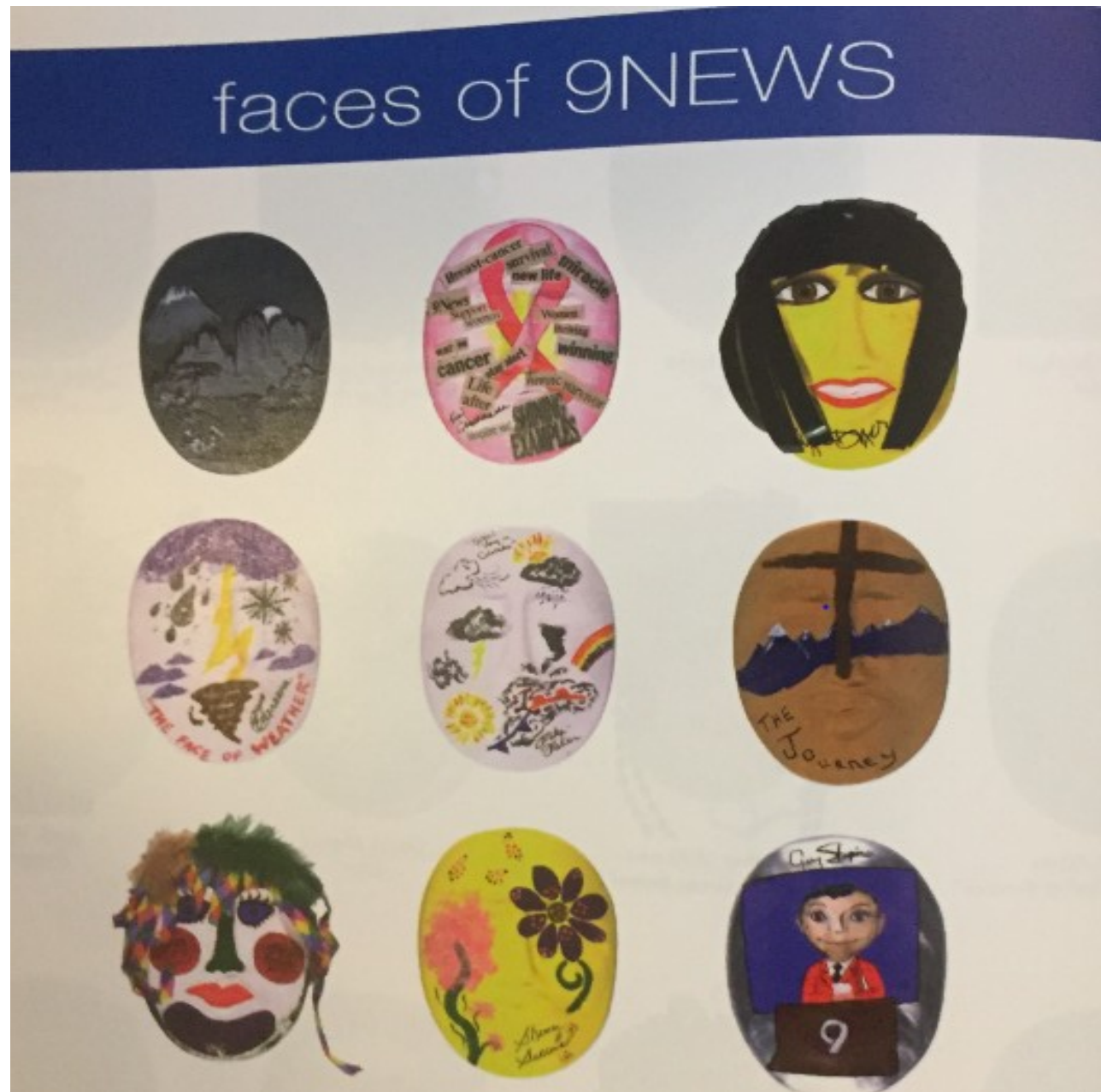


THE MASK PROJECT

Everyone wanted
in on the event...

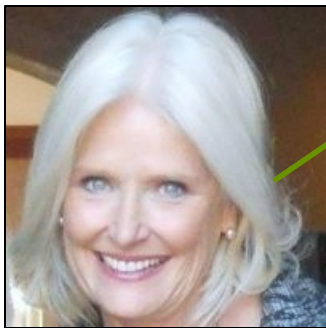
Over 400 masks
were created and
auctioned off.

Even local TV
personalities and
politicians. got
involved.





THE MASK PROJECT



Lyn Woods

Critical Success Factors...

1. Creative idea with PR potential
2. Tested 'concept' with mini feasibility study
3. Leadership (and cadre of volunteers)
3. Celebrity power
4. Hard work and attention to details.

(And maybe some luck)



MATCHING GIFTS AND CHALLENGE GRANTS

What experience have you had?

Best Practices to share?

MATCHING GIFTS and CHALLENGE GRANTS



A donor's gift is matched by a generous donor. Helps people feel their money will make more of a difference.

Various ratios 1:1, 2:1 or more (usually up to cap)
Usually a deadline—creates urgency

The “giver” of the challenge grant is recognized—
PR value

Corporations and foundations like to leverage their
money

Work out details before you approach the potential
donor—*ensure that if you fail to meet the goal,
you still keep the money raised*

EMPLOYEE MATCHING GIFTS

“Every year, only about 1 in 10 eligible donors match their donations.”

Every year, about \$6 to \$10 billion of matched donations is left unclaimed.”

--Double the Donation

Employee Matching Gifts

- Often dollar-for-dollar—sometime double or triple the employee donation
- Some match gifts for employees’ volunteer efforts (e.g. walkathons)
- Typically, individuals must initiate with their employers

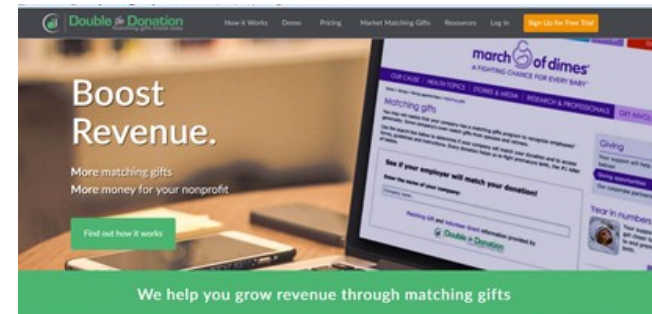
Volunteer Support Programs

- Sometimes called “Dollars for Doers” (individual volunteer grants)
- Reward employees who donate their time
- Team-building efforts (e.g. build a house for Habitat) usually with a corporate donation

Tools to Facilitate Employee Matching Gifts

[Foundation Directory Online](#)--searchable grant makers

Other databases and services make the process easier for donors.



MATCHING GIFTS

Best Practices



- Invite board members and major donors to make a gift that will become a challenge grant (can be a single donor or a group of donors; you can set maximum for matching)
- Help facilitate employee matching gifts from companies
 - Revise giving forms so donors can indicate if their company may match donations
 - Add text in donor thank you's about employer matching gifts
 - Provide forms for donors to give directly to their companies
 - Research which companies typically offer matching gifts—put link to the list on your giving website

MATCHING GIFTS

A twist on a matching gift concept...

The business makes a charitable gift for closed business.

Highlighting the charities we are honored to support this year!



Live Urban Agents nominate and vote each year to support three local charities through donations, awareness, and volunteer efforts. Upon a successful property closing, we then allow our clients to choose the charity they would most like to receive a donation. The Live and Give Program is one of the things we're most proud of and we'd like to share more about each of our 2017 partners and the amazing things they are doing for our community. Click on each logo to learn more about that organization and other ways you can help support them too!



Agents (employees) vote on causes the company will support that year.

For every "sale" (closed real estate transaction), the real estate firm makes a donation to the charity of the customer's choice.

BEQUESTS | TESTAMENTS PLANNED GIFTS

What experience have you had?

Best Practices to share?

BEQUESTS (PLANNED GIFTS)

Planned gifts represent the opportunity to be remembered for something that's been important in your life.



Compelling U.S. Statistics

33 percent of Americans are willing to consider a bequest gift¹

5.3 percent of Americans over age 50 have included a charity in their will

\$35,000 is the value of the average bequest commitment in the U.S.

“Planned Giving is about adding a “0” to the donor’s total giving. If the donor’s giving is \$25,000, the planned gift potential is \$250,000.

-Kristen Dugdale, Vice President, Gift Planning,
University of Colorado Foundation

“Planned giving may be the answer to the objection: ‘I would like to do more for your institution, but. . .’”

Comfort, Georgetown University

BEQUESTS (PLANNED GIFTS)

*There is a clear link between **life stories** and the charities that bequest donors choose to remember.*



Profile of a planned giving donor

- Age 49 or older
- Pattern of loyal giving over a number of years
- Demonstrated support for a particular cause
- Not necessarily wealthiest of donors

Nearly 40 percent of current planned givers have a history of giving make annual donations of less than \$500. - 2012 Stelter Donor Insight Report

We've seen donors who had given only \$275 over their lifetime, make a \$1.5 million bequest. -- CUF Planned Giving Team

BEQUESTS PLANNED GIFTS

Best Practice

Ongoing, inspiring messaging through various channels.

“Many people are able to give significant gifts through their wills—far more than they may be able to give during their lifetimes.”

Inspire Donors to Make a Gift in their Wills-- A Long-Term Strategy

Will Power
"My responsibility on this earth is to share what has been gifted to me."

Professor Barbara Swaby has dedicated her life to ensuring that thousands of children can read. Her free reading clinics and efforts to get books to low-income children change lives "one child at a time."

Now, Professor Swaby is expressing her personal passion for her own life's work in a very special way. Through a bequest in her will, she is helping to ensure that her life-changing work will continue.

"I would like to believe that something I have left behind is still of benefit to the children on this earth."

You too can create a meaningful legacy through a bequest.

University of Colorado Foundation

Click here for a free guide to preparing a will or trust.

To learn about other planned options, contact Gift Plan planned.gift@colorado.edu or call 303.541.1335. Visit us at www.colorado.org/planned-giving.

Will Power
One of Louise Bennett Reed's life passions was athletics.

Louise Bennett Reed

Will Power
"My responsibility on this earth is to share..."

Read more.

Plan Your Will
Download our Wills Planner to get started in creating your legacy.

Plan now.

BEQUESTS (PLANNED GIFTS)

Best Practices

“It’s common for people not to share information about a gift in their will. Yet there are reasons why they should.”



- Include a discussion about bequests when talking with donors—educate them
- Develop relationships with lawyers and accountants (referral sources)
- Provide legally accepted language that can be included in a will or bequest (will kit)
- Encourage donors to make their intentions known (*A story here...*)
- Encourage the donor to also make a current gift so they can see the impact of their gift
- Create a special “club” for bequest donors (e.g. Heritage Society, Honor Guard)

BEQUESTS (PLANNED GIFTS)

Ongoing Communication Strategy



Dear Marlene,

Being proactive gives many of us an energetic surge. It feels great to get things done and tick off those tasks in our lives that need attention. That same 'just do it' energy can flow when you begin thinking about and setting up future financial and estate goals.

Today you'll meet Corrie West, who set up a financial and legacy plan that ensures her loved ones know her wishes and also supports scholarships for women and a local caregiver program. Corrie says, "My intentions are spelled out, and I've made these decisions when life is calm."

We want to be here for you when life is calm and also when it perhaps is not. If you have questions about planning for your future, contact us today.

University of Colorado Gift Planning

P.S. Learn how to [ace will planning from the comfort of your home.](#)



This is the power of planning

As an associate director of development at UCCS, Corrie West already knows how powerful philanthropy can be. But her own life experiences have inspired West personally; she has made a planned gift to support UCCS.

[Read more >>](#)

**Where There's a Will,
There's a Way**

We all dream of making a gift that will make a lasting difference. But, most of us can't make the philanthropic impact we'd like to make in our lifetimes. That's why many generous individuals include a bequest in their will. It is an easy way to make a sizable gift that reflects one of your life's passions.

If you don't have a will, now is the time to get started. If you have one and it needs updating, don't put it off any longer. Plan for the future today.

Request **A Guide to Wills and Trusts**. It's free for the asking.

You are receiving this message because of your relationship with the University of Colorado. Help us stay in touch. Update your [contact information](#) today. Please [click here](#) to remove yourself from future emails. Please do not reply to this email. Charitators or comments may be sent to plannedgiving@colorado.edu. Call Planning Group, University of Colorado Foundation, 4740 Walnut St., Boulder, CO 80531, Phone: 303.541.1333 | 1.888.255.3333

UNIVERSITY OF COLORADO
FOUNDATION

**Dream Big.
They Did.**

La bohème

Will Power

FOREVER buff to Opera Buff.

[Read more.](#)

Plan Your Will

Download our Wills Planner to get started in creating your legacy.

[Plan now.](#)

CORPORATE FUNDRAISING

What experience have you had?

Best Practices to share?

CORPORATE FUNDRAISING

Realistic Expectations

In the U.S. only 5% of all giving comes from corporations.

Remember that giving is an exchange—something for something. This especially holds true with businesses.

Philanthropy is good business—enables a company to differentiate and boost good will (with its employees, too).

- Corporate foundations—philanthropy
- Sponsorships
- Cause-related marketing
- Matching gifts/challenge grants
- In-kind donations or pro bono services

Finding the right corporation partner is like finding the right life partner. Look for one that matches your organization's interests, priorities and mission.

CORPORATE FUNDRAISING

Best Practices

Companies give for different reasons—both altruistic and practical.

“Some businesses value having access to other corporation and foundation donors, as well as conversations with your leadership about subjects important to them.”

- Discover *where the CEO's heart lies*
- Focus group of corporate representatives
- Leverage connections of your board

- Do your research before you set up a meeting with a company
 - What the company is interested in
 - Giving track record
 - Be clear in how you can help the company in an area important to it

A couple of quick stories---

University of Colorado Denver, Business Program.

Two Quick Stories

Major Multi Million \$ Gifts from Corporations



J.P. Morgan Center for Commodities

The J.P. Morgan Center for Commodities provides education and research in commodities markets, regulation, trading, financial fundamentals, investing, risk management and ethics.



Jake Jabs Center for Entrepreneurship

The Jake Jabs Center for Entrepreneurship is a networking hub and source of comprehensive resources for start-up ventures and for innovation and change within larger organizations.

CORPORATE FUNDRAISING

Best Practice

Corporate Advisory Board



Jim Dunn

“We developed a corporate Advisory Board And invited the up and coming leaders of companies to be members. Not the CEOs or big hitters, but the next generation of leadership.

They turned out to be a great board to work with and became real advocates for us. We also instituted a giving commitment of \$15,000 year.

The board met a number of times per year. They provided advice and opened doors for sponsorship. The board is still going.”

The Lincoln Center, New York

More On Corporate Giving

Random
Thoughts on
Corporate Giving



Andrea Wagner

“Even though the money is coming from the corporation, try to connect with a senior person in the company and get them involved with their passions.”

“View businesses as a another relationship to be built. Look for existing contacts between staff and volunteers and the company’s employees.”

“Companies tend to want more straight forward things. You need to be very clear with corporations.”

“Ask yourself—what’s in it for the company? Focus on ways to create a win-win partnership.”

“Most businesses prefer to give locally. Your top prospects will be companies operating in your area.”

“Chances are, you are one of many who are applying”

“Best not to count on companies for long-term funding for your organization.”

FUNDRAISING PROGRAMS



Andrea Wagner

One Parting Thought...

“Get really focused on what you are trying to accomplish and then focus on that.”

“If you can’t do everything, choose one or two areas and move forward from there.”

What will be your focus?

QUESTIONS?

HOW WOULD YOU SUMMARIZE TODAY'S
WORKSHOP?

REMEMBER OUR WORKSHOP GOAL

What is your 'one bright idea'
or 'seed of an idea' that might work in
your organization?

