

# Back to Basics!

## Annual Fundraising Foundations and Strategies

Downtown Institute

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# OVERVIEW of Session

- Expectations of Leadership
- Building Your Case for Support
- Planning Your Annual Fund—  
Goals, Prospects, Strategies
- Making the Ask
- Maintaining the Donor Relationship

# Leadership

- Leadership is the first thing!

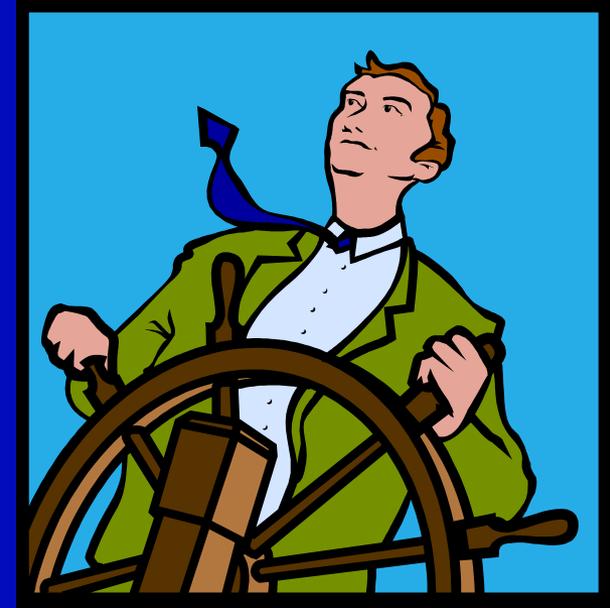


## Do the Leaders Have Clear Expectations?

- 100% Giving annually
- 100% providing contacts
- 100% making connections

# Leadership

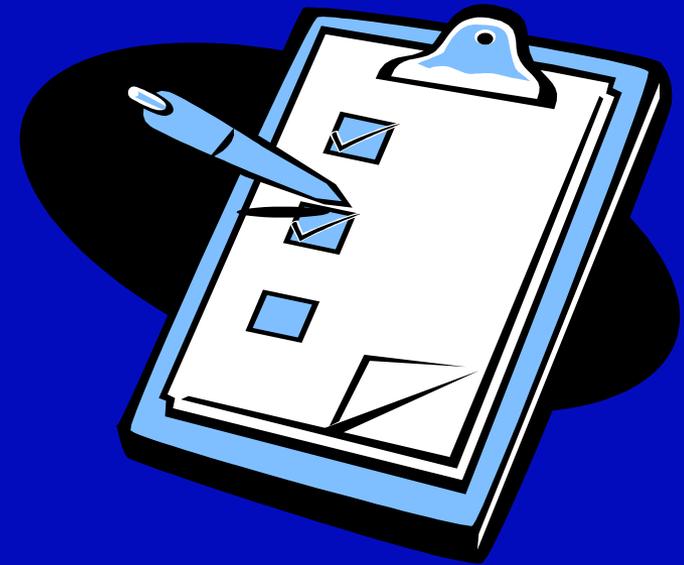
- One-Third of Board Giving Top Gifts
- One-Third Asking Directly—alone or with help
- Lead Staff: Model and Support
- Lead Staff: Provide Tools
- Lead Staff: 40%+ of Time



# Leadership—Recruitment

## Checklist:

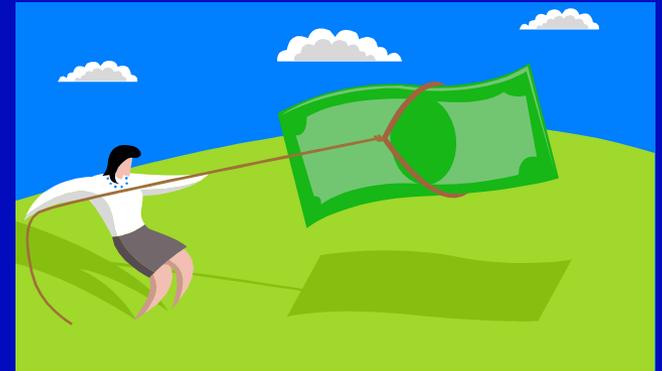
- Clear Job Description
- Clear Giving Expectations
- Clear Fundraising Expectations



# Case for Support

- Competition for dollars is high!

- People give to people



- People Give to Work/Results/Impact

- People are NOT Giving to Your “Need”

# Case

- What is your impact?
- How can you measure impact?
- Small Groups



# Funding Plan for the Case

- What Are Your Funding Priorities?
- Why is the Budget Higher?
- What Will This Allow You To Do?
- Reinforce Your Case!



# Planning Your Efforts

1. Set Annual Fund Goal
2. Recent Gift Trends
3. Identify Prospects  
3 to 5 for Every Gift Needed
4. Finalize Your Contact Strategies

# Setting Your Annual \$ Goal

Be Clear:

Goals vs. Needs

Needs vs. Wants



# Recent Gift Trends

How Many Donors Now?

Up/ Down From Last Year?

What Giving Levels?

What Level = Greatest Growth?



# Identify Prospects

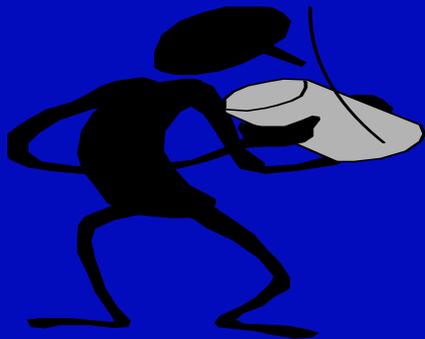
- Best Relationships
- Most Potential to Increase



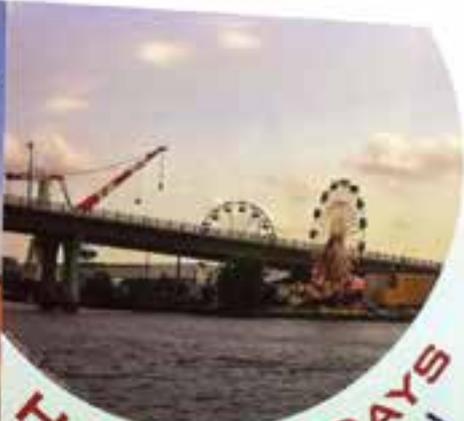
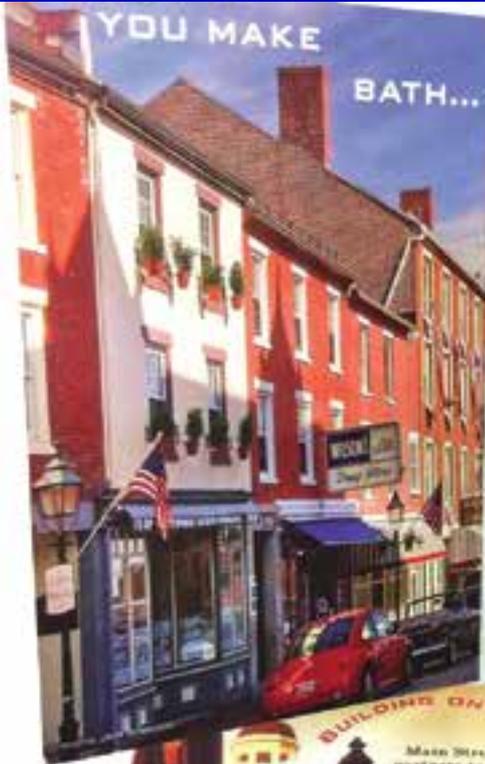
- Never Asked
- New to Community
- Board Suggests

# Contact Strategies

1. Face to Face
2. Telephone Call
3. Direct Mail
4. Combination

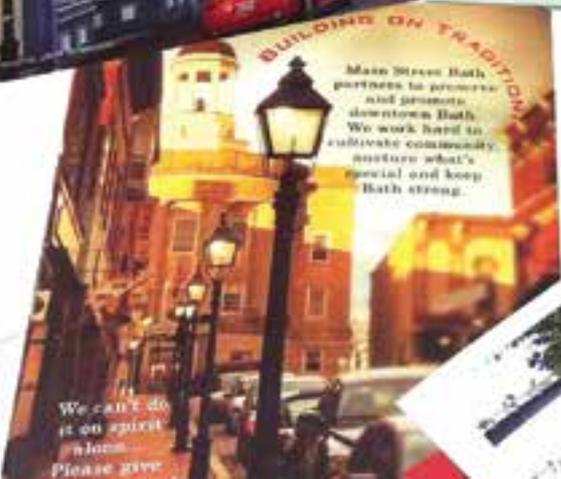


# Main Street Bath



SEASONAL CELEBRATIONS  
COMMUNITY, BUSINESS  
& GOVERNMENT  
WORKING TOGETHER  
HOMETOWN  
SPIRIT!

HERITAGE DAYS  
GREAT AMERICAN  
MAIN STREET AWARD  
FLOWERS & BANNERS  
KEEP BATH BEAUTIFUL!



# Gift Chart Example

Main Street Bath - 2012 Annual Campaign Giving Chart - Tracking

			Goal Total	\$ 61,000.00				
Gifts Actual	Gifts Goal	In the Range of		Actual Total		Goal Total		Percentage
1	1	\$ 20,000.00		\$ 20,000.00		\$ 20,000.00		32.79%
1	2	\$ 5,000.00		\$ 5,000.00		\$ 10,000.00		8.20%
1	2	\$ 2,500.00		\$ 3,000.00		\$ 5,000.00		5%
1	2	\$ 1,500.00		\$ 1,500.00		\$ 3,000.00		2.46%
6	4	\$ 1,000.00		\$ 5,900.00		\$ 4,000.00		9.67%
11	9	\$ 500.00		\$ 5,301.50		\$ 4,500.00		8.69%
14	12	\$ 250.00		\$ 3,250.00		\$ 3,000.00		5.33%
60	45	\$ 100.00		\$ 6,500.00		\$ 4,500.00		10.66%
106	100	\$ 50.00		\$ 5,200.00		\$ 5,000.00		8.52%
18	80	\$ 25.00		\$ 465.00		\$ 2,000.00		0.76%
218	256			\$ 56,116.50		\$ 61,000.00		91.99%

Analysis: to succeed we need to find: still to raise... \$ 4,883.50

1 new donor at the \$5000 level

2 new donors at the \$2500 level

5 new donors at the \$1000 level

100+ new donors at the \$25-\$50 level

# “Atmospherics” of the Asks

1. Assignments to Board
2. Two is Usually Better
3. Clear Ask
4. Why We Are Asking You
5. Clear Plan for Follow Up

## Asking Tips:

Ask High Because You're Serious.

Please Practice the 50/50 Rule.

Ask for a Clear \$ Amount.

Remain Silent After You Ask!

Follow Up. Follow Up. Follow Up.

# Stewardship— Building the Relationship

- Meaningful Contacts Behind Every Increase
- Planned Gift
- Transformational Gift
- Capital Gift
- Program Gift
- Annual Gift



# Stewardship--Individuals

Strive for 5+ Meaningful Contacts Per Year

1. Acknowledge/Thank Upon Receipt

2. Personally Thank

3. Personally Thank 2-6 Months Out.

What did the gift REALLY do?

Or-What is the Status of the Project?

# Stewardship--Individuals

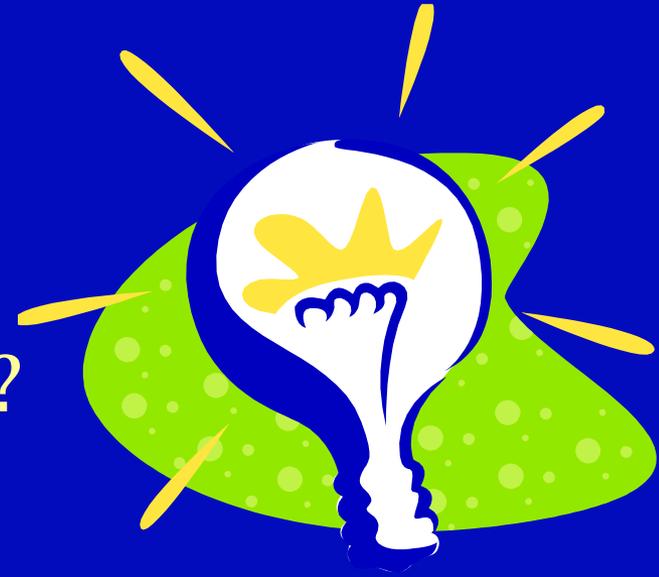
## Meaningful Contacts Per Year (continued)

4. What advice do you have? (Visit)
5. Build Interest/Share News (Visit/Mail)
6. Invite to an Event (Call)
7. Recognize As Appropriate (Person/Print)

# Stewardship--Sponsors

Strive for 5+ Meaningful Contacts Per Year

1. Acknowledgment/Thank you
2. What did your sponsorship REALLY do
3. What advice do you have/what can we do better for you?
4. Over-deliver on Exposure
5. Can they give YOU Exposure?



KEEP UP THE GREAT WORK!

THANK YOU!



