Your Work Deserves to Be Well Funded

This workshop will present simple steps to plan for end of the year fundraising from individuals for grassroots organizations.
Using Zoom
In The Chat Please Introduce yourself:

1. Name
2. Pronouns
3. Organization
4. Location
OVERVIEW

Planning a Fundraising Campaign

Why Individual Donors?
Making a Plan
Sorting your donor list
Thanking Your Donors
Raising Money During COVID

Questions
Planning an (Individual Donor) Campaign
Why Focus on Individual Donors?
Total USA Charitable Giving in 2018:

- 70% from living individuals
- 9% from bequests
- 16% from Foundations
- 5% came from Corporations

-Giving USA 2018, the Annual Report on Philanthropy.
How Many Cats Do you Need to Reach Your Goal?

Grass Roots Vs. Major Donors
GRASSROOTS FUNDRAISING
Many Cats Giving Modest Donations

Raising money from individuals or groups from the local community on a broad basis.

Usually an organization's own constituents — people who live in the neighborhood served or clients of the agency's services — are the sources of these funds.
MAJOR DONORS
A Few Donors Give Large Donations

The Average Nonprofit in The USA Raises
80% of their funds from 20% of their donors
Plan the Work/ Work the Plan

1) SET YOUR GOAL.
2) SCHEDULE YOUR WORK.
3) BUILD YOUR TEAM.
4) TELL YOUR STORY.
5) FIND YOUR DONORS.
1) SET A GOAL:

What Do You Need?
What Could You Accomplish with More Resources?
Set a Firm Number

Do not compromise, calculate the real cost
2) SCHEDULE YOUR WORK

When is the best time for your campaign?

How much time will you need to prepare?
3) Build Your Team
This is a Group Project

Create a Culture of Philanthropy + Possibility
4) Tell Your Story
Engage Donors with Your Messaging:

1. Frame the problem that needs to be solved.
2. Show donors/supporters that they have a role to play in solving it.
3. Position your organization as the right vehicle to connect the two.
This moment demands that we live our values.

Now more than ever, a clear theory of change is important.

There are many urgent causes in need of support.

Your job is to show your supporters how your organization can make the biggest impact with their dollars, right now.
5) FIND YOUR DONORS

WHO TO ASK:
Where Are These Donors You Keep Talking About?
You Probably Already Know Them
Who Shows Up For You =
Prospective Donors
On Your Own

Who are your supporters?

List 3 people who might donate to your organization
Sorting Your Donor List
What to Look for in a Prospect

**Ability:** Access to resources and willingness to give to nonprofits

**Belief:** Cares for your organization or aligned cause

**Connection:** You have access to this person
Rate these Prospects’:

**Ability**
Access to resources and willingness to give to nonprofits

**Belief**
Cares for your organization or aligned cause

**Connection**
You have access to this person

**Scale:**
1 = Low
2 = Medium
3 = High
Score 7 - 9 = HOT PROSPECT

*Design the right ask and go for it.*
Determine the best method to ask for the donor.
Highlight their interests in your pitch.

Score 5 - 6: DEFINITE MAYBE

*Would cultivation be better?*
They might not be your donor.

Score 4 or Less = COLD PROSPECT

You need to connect with them.
How can you engage them?
They might not be your donor.
Ignore the Rich Dude
You Don’t Know

**Ability = 3**
He is swimming in $$
Gives Away Funds to Mainstream Nonprofits

**Belief = 0**
Not involved with “the Movement”

**Connection = 0**
Not connected to your programs, board, staff, volunteers, or participants

**Score = 3**
Focus on Your Community

**Ability = 2**
She has a fulltime job  
Attends the benefits for local causes

**Belief = 3**
Her yard signs/ bumper stickers show she is progressive

**Connection = 2**
She knows me but not my organization.

**Score = 7**
Activity:

ABC Evaluate your list of 3 Prospective Donors?
How Much Should You Ask for?

Framing Questions:
- Do they have a full-time job or access to other resources?
- Have they had a major life change recently?
- Do they/how much do they give to other organizations like yours?

Your pal Google:
- Zillow/Trulia
- Tax Assessor’s Database
- LinkedIn

These do not tell you everything!

Be careful to keep private information private!
## Gift Chart Example

<table>
<thead>
<tr>
<th>Prospect Name</th>
<th>ABC Score</th>
<th>Target Ask</th>
<th>Type of Ask</th>
<th>Primary Solicitor</th>
<th>Support Solicitor</th>
</tr>
</thead>
<tbody>
<tr>
<td>Patty</td>
<td>7</td>
<td><strong>$300</strong>&lt;br&gt;25 a month</td>
<td>Letter</td>
<td>Delia (Patty’s neighbor)</td>
<td>Shawn (Staff)</td>
</tr>
<tr>
<td>Joan</td>
<td>7</td>
<td><strong>$500</strong>&lt;br&gt;$42 a month</td>
<td>Zoom Call</td>
<td>Emily (Both work at the same Elementary School)</td>
<td>Delia (Board Member)</td>
</tr>
<tr>
<td>Penny</td>
<td>7</td>
<td><strong>$1,000</strong>&lt;br&gt;$84 a month</td>
<td>Zoom Call</td>
<td>John (Penny attends the same church as John)</td>
<td>Shawn (Staff)</td>
</tr>
<tr>
<td>Lu</td>
<td>6</td>
<td><strong>$250</strong>&lt;br&gt;$21 a month</td>
<td>Email/ Social Media</td>
<td>Shawn (Lu’s former co-worker)</td>
<td>Emily (Board Member)</td>
</tr>
</tbody>
</table>
## Volunteer Tracking

<table>
<thead>
<tr>
<th>Name</th>
<th>New prospect?</th>
<th>Notes</th>
<th>Date invited to Annual Campaign Kickoff?</th>
<th>Attending event?</th>
<th>Date meeting</th>
<th>Target Amount</th>
<th>Format (Online, Check, etc.)</th>
<th>Amount received (including total, if monthly)</th>
<th>Monthly donation, if any</th>
<th>Date donation received</th>
<th>Donation notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Delia Kovac</td>
<td></td>
<td>out of town and sustainer</td>
<td>10/4/2016</td>
<td>out of town</td>
<td></td>
<td>500</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Donor A</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>10/4/2016</td>
<td>$250 (Online)</td>
<td>12/13/201</td>
<td>6 $15-$20/month</td>
<td>12/28/201</td>
<td>ED will ask, bring her up to move her from $15-$20/month - should try to bump up to $10/month - currently giving at $10/month -</td>
</tr>
<tr>
<td>Donor B</td>
<td></td>
<td></td>
<td>10/4/2016</td>
<td></td>
<td></td>
<td>10/4/2016</td>
<td>150 (Online)</td>
<td>$100</td>
<td>1/1/17</td>
<td>6 $15-$20/month</td>
<td></td>
</tr>
<tr>
<td>Donor C</td>
<td></td>
<td></td>
<td>10/4/2016</td>
<td>11/21</td>
<td>150</td>
<td>Online</td>
<td>$100</td>
<td>1/1/17</td>
<td>6 $15-$20/month</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Donor D</td>
<td></td>
<td>out of town</td>
<td>10/4/2016</td>
<td>out of town</td>
<td>10/15</td>
<td>300 (Online)</td>
<td>$250</td>
<td>12/28/201</td>
<td>6</td>
<td>6 $15-$20/month</td>
<td></td>
</tr>
</tbody>
</table>
Break your goal down into individual gifts.
Make A Pyramid For Your Goal

-$1-$99
-$100-$249
-$250-$999
-$1000-$4999
-$5000+

Levels of Goal Funds
Now that you know who you are asking and you have an estimate of what an appropriate ask might be, fill in your pyramid until you reach your goal.
Make Solicitation plans for each prospect.

- Ask top prospects in-person first
- Announce your campaign after the first gifts
- Optional: Host a virtual kick off party
- Send your letter appeal
- Launch online appeal last
Build Big Success
By Reaching Small Goals

EVERYONE LOVES A WINNER
CLOSE BIG!

Use a Thermometer Online

WE'RE SO CLOSE!

Just <<$1,282>> left to go to reach our annual campaign goal.

Can YOU help put us over the top and support more transformative music empowerment programming in 2015?... See More
THANK YOUR DONORS

Make your gratitude tangible
Every Donation Gets 2 Thank Yous

Handwritten card

Dear [Name],

What a great gift to receive your donation on the Give Big Day May 3rd! Thank you for choosing to support Friends of Hyalite.

Your donation will go directly to our watershed campaign and specifically to clean up shooting areas and protect Bozeman’s water supply.

Despite the rainy weather our Annual Spring Clean Up on May 15th generated 15 volunteers cleaning up several tons from the winter. Our next shooting area clean up is June 18th.

Please know your gift makes a difference to help keep Hyalite enjoyable to all.

On behalf of the Board,

[Signature]

Formal Donation Acknowledgement

June 18th, 2017

[Logo]

Dear [Name],

We truly appreciate your thoughtful contribution of $50 to Toronto Cat Rescue (TCR) in Honour of [Name]. As a volunteer-powered organization, we are able to save many lives each year because of supporters like you. Donors work alongside foster parents and volunteers to help facilitate successful adoptions. When someone adopts a cat into their forever home, it saves two lives—the adopter and the cat that will be rescued in his or her place. In July alone, we found forever homes for 188 cats! One of the cats we were then able to save in July was Lolly.

As most of us are well aware, balconies pose as a considerable threat to curious, height-seeking felines. One such tragedy came to TCR’s attention last spring when a cat named Lolly was surrendered to Toronto Animal Services (TAS) because her owners were unable to afford her medical bills. Poor Lolly fell a mind-boggling 15 stories, breaking her front paw, dislocating her jaw and lacerating her leg.

With the help of a lot of caring people, such as yourself, our little miracle girl Lolly received the surgeries she needed and was placed in a foster home to continue her recovery. With plenty of love, nutrition and cage rest, Lolly began eating on her own, gaining weight, and regaining her strength and vitality.

A couple of months later, we are thrilled to share the news that Lolly’s foster home has made the decision to officially adopt her! As she continues to recover comfortably in her forever home, we feel truly humbled by the support that this community has offered to Lolly and other cats just like her. More recently, this commitment has been demonstrated through the careful planning and construction of a new volunteer centre, which will provide an incredible facility to help maximize the amount of lives we can save. We are grateful that so many generous souls have supported our cause. Thank you for helping us save precious lives!

Best Wishes,

[Name]

TCR Online Donations Manager

If you’d like to keep in touch, please sign up to receive monthly e-news updates here: http://eepurl.com/bMi9zNI, add us on Facebook or follow us on Twitter @TorontoCatRescue
How to Ask for Money During a Pandemic

Hello? Yes, I’m ready for the video conference.
Your belief in your cause has to be greater than your fear of asking
People Are Still People
Questions
After the Campaign

Evaluate The Results
So You Can Focus on What Works
Create a donor stewardship plan!
Data to Track

- Total number of donors
- Total dollar amount raised
- Number of major donors
- New donors
- Repeat donors
- Sustaining donors
- % of board giving
- # at each $ level (giving pyramid)
- Which pitches were the most effective
- What motivated donors to give?: programs, prompts, people
- Success of different methods: online, mail, in-person meetings, etc.
SELF CARE:
This is Hard Work, Sustain Yourself