



Fundraising Basics for Women's Organizations

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Authors: Lesley Ackrill & Ashleigh Saith

Interval House
2 Montcrest Blvd
Toronto, ON M4K 1J7
Canada

416-924-1411 ext. 224
lackrill@intervalhouse.ca
asaith@intervalhouse.ca

www.intervalhouse.ca

Culture & Preparation

Why is fundraising important?

- Allows your organization to become sustainable and stable. Not finding yourself forced to cut programs
- Fundraising gives you the flexibility and independence to respond to your clients' needs, to build programs, and take calculated risks
- Stable funding enables you to plan strategically
- Not relying on one or two funders models independence to your clients

Engaging your Board of Directors

- Board members need to be visionary. They should be:
 - Fundraisers & ambassadors for your organization
 - Donors
 - Willing to approve expenditures for capacity building activities like fundraising

Building a culture of philanthropy in your organization involves:

- Entrepreneurship and opportunism
 - Actively look for opportunities and take advantage of them
 - Conduct a SWOT analysis for each new opportunity
- Openness to engaging the community
- Donor-centered fundraising & relationship building
 - Donors want a relationship with the organizations they give to.

Allocation of resources & data capture

- What you need:
 - Dedicate resources to fundraising, including money and staff
 - Good accounting procedures to ensure clarity and transparency
 - Database & tracking tools to capture data and track campaigns
 - Understanding of legal requirements (ex. what you can issue a tax receipt for, privacy laws)

Most important things you can do to get money now

Tell stories!

- We are often inclined to use stats and figures to convey the problem but *people give to people*
 - Collect testimonials and stories
 - Tell a client's story, or have a client tell her story
 - Talk about your personal experiences; your passion for working in the sector
 - Collect stories from volunteers
 - Use stories to appeal to a donor's emotions
- Apply this to ALL fundraising activities

Major Donors/Planned Giving

- Inexpensive way to bring in large donations but takes time to build these relationships
- Major donors want:
 - A personal connection with people at your organization
 - A return on their investment (which you can convey through reporting, site visits, etc.)
 - To see that you manage their money well (ex. audited financial statements or annual reports with financials)
- Do research on your donors
 - Document research using donor profile sheets (see Donor Profile Template)
 - Make sure this information is kept confidential
 - You can find information on:
 - Net worth
 - Other philanthropic involvement
 - Donation amounts, volunteering, committee chairs, etc.
 - Interests
 - Family
- Moves Management
 - This is the process of building interest and trust between your organization and the prospective donor
 - Involve donors in different ways before asking for a gift (ex. a birthday phone call, lunch, site visits)
 - Document these "moves", their results and next steps (see Donor Call Template)
- Asking for the gift



- Make sure to match your donor's interests to a program at your organization
- Who asks for the gift is as important as the project or amount → wealthy donors prefer to do business with someone who appears to be at their level
 - Involve your board, long-time volunteers, executives
- Expand your network
 - Ask current donors to bring their friends in for a tour/small reception and begin moves management process with the new contacts
- Planned Giving
 - Long cultivation process
 - These gifts usually come from donors who have been giving for a long time – even a \$2/yr donor who has given for 25 years
 - Come in the form of bequests, life insurance, trusts and annuities
 - Can provide substantial donations but are unpredictable
 - Different requirements on how these are handled & receipted – best to do research on your area

Corporate Partnerships

- Companies are looking for mutual benefit and social responsibility activities
- Look for creative ways to partner
 - Financial donations are not always the company's preferred method of involvement
 - Offer volunteer opportunities to employees as teambuilding activities
 - In-kind donations
- Connect with a leader in the company - not necessarily an executive, but someone loyal to your cause who knows how to get things done
- For financial donations, find out if the company has any specific funding interests or formal proposal guidelines. Work with your connection at the company to champion your proposal.

Maintaining & Building the program

Stewardship

- Stewardship is what makes an occasional donor a committed donor; what turns \$500 into \$1000
- How?
 - Show how the donation has made a difference:
 - Say thank you (notes, phone calls, letters, emails)
 - Provide recognition
 - Invite donors in for tours or meetings with frontline staff to talk about your programs
 - Provide reports (specifically for larger gifts, or when otherwise requested) and tailor them to your audience
 - Annual report to loyal donors (see samples)
 - Invite them to special thank you events
 - Segment large donors out of your regular mail stream if you have one – send newsletters and tailored solicitations only
 - Ensure communications are timely. Send tax receipts and thank you letters/phone calls out within days of receiving the gift.

Recognition

- It takes 7 thank yous for someone to feel appreciated
- Use a personal touch – hand-written cards, kid's art, etc.
- Larger donations = more public recognition
 - Thank you from a board member or manager
 - Donor wall (physical and/or online)
 - Features in publications – newsletters, annual reports, email blasts, etc.
 - Public recognition at an event
 - Naming awards after a donor
- Helpful to have a policy or chart outlining gift levels and what level of recognition donors will get. This will ensure consistency.
- Before publicly recognizing a donor, make sure they want their donation made public.

Other fundraising activities

Grants and Proposal Writing

- Important source of funding, specifically for new projects
- Treat foundations the same way you would a major donor. Build a relationship and steward them, match your programs to their interests.
- See handouts *Funding Proposal Outline* and *Budget Template*

Direct Marketing & Communications

- Gets smaller donors in the door and introduces them to your organization
- Multiple channels: direct mail, monthly giving, street canvassing, social media (Facebook, Twitter, LinkedIn, Flickr, YouTube), online initiatives, special campaigns
- Tips for successful campaigns:
 - Tell a story
 - People give to people, not organizations
 - Use stats very sparingly
 - Use easy, understandable dollar amounts & give a range
 - Ex. \$40 buys toiletries for a new resident
 - Keep language simple and use short sentences and paragraphs. Reading level should be below grade 10.
 - Keep concepts simple
 - Tell your audience the problem and tell them how to fix it. Donors don't like feeling overwhelmed by a problem they think can't be solved.
- Get yourself on other mailing and e-communication lists to see what others are doing
- Eblasts
 - Add a "sign up" field on your website, response devices and bring sign-up sheets to all events
 - Use an email marketing provider like Campaign Monitor to design and send e-blasts
- Tracking results
 - Rate of response, gross & net revenue, ROI, # new donors
 - See handout *Direct Mail Tracking Sheet - Template* to calculate these statistics
 - Use Google Analytics to track website hits and referral sources
 - Open and click-through rates on eblasts
 - Social media activity



Special Events

- Helps build public profile but success is also dependent on your profile
- Low return on investment in initial years
- Third party events
 - Great way to involve the community or to use volunteers who you don't have room to accommodate in regular programming
 - Create a contract for event holders to sign to ensure you are not liable for any lost revenue, legal issues, etc.
 - Ensure all events fit your mandate & values

Capital Campaigns

- See handout *Resources* for books on capital campaigns

Other things you can do

- Joining the Association of Fundraising Professionals chapter in your city give you access to:
 - Online resources
 - Introduction to fundraising course
 - Webinars
 - Annual conference & fundraising days
 - Mentorship programs
- Join relevant LinkedIN groups
- Read fundraising blogs and websites
- Sign up for newsletters. Canadian Examples:
 - Hilborn ENews – Canadian Fundraiser
 - Imagine Canada
- Hire consultants (use RFP process)

Resources

Books

General Fundraising:

- The Fundraising Audit Handbook – Guy Mallabone & Ken Balmer (Civil Sector Press 2010)
- Establishing Your Development Office - Linda Lysakowski, ACFRE (Association of Fundraising Professionals, 2002)
- Conducting a Successful Annual Giving Program – Kent E. Dove (Jossey Bass Publishers, 2001)
- Conducting a Successful Major Gifts and Planned Giving Program – Kent E. Dove (Jossey Bass Publishers, 2002)
- Developing Major Gifts: Turning Small Donors into Big Contributors – Laura Fredricks (Jones and Bartlett Publishers, Inc., 2003)
- Capital Campaigns: Strategies that Work – Andrea Kihlstedt and Catherine P. Schwartz (Aspen Publishers, 2009)
- Anything by Mal Warwick, Tom Ahern, Ken Burnett
- Donor Centred Fundraising – Penelope Burk (Burk & Associates Ltd., 2003)

Online

Association of Fundraising Professionals (<http://www.afpnet.org>) – must be a member to access most resources

Imagine Canada (www.imaginecanada.ca) – Canadian advocacy organization

SOFII (www.sofii.org) – an online collection of fundraising examples

CharityVillage (www.charityvillage.com) – resources and links

Blogs

www.flatearthdirect.com/blog

www.futurefundraisingnow.com

www.theagitator.net

www.pamelagrow.com