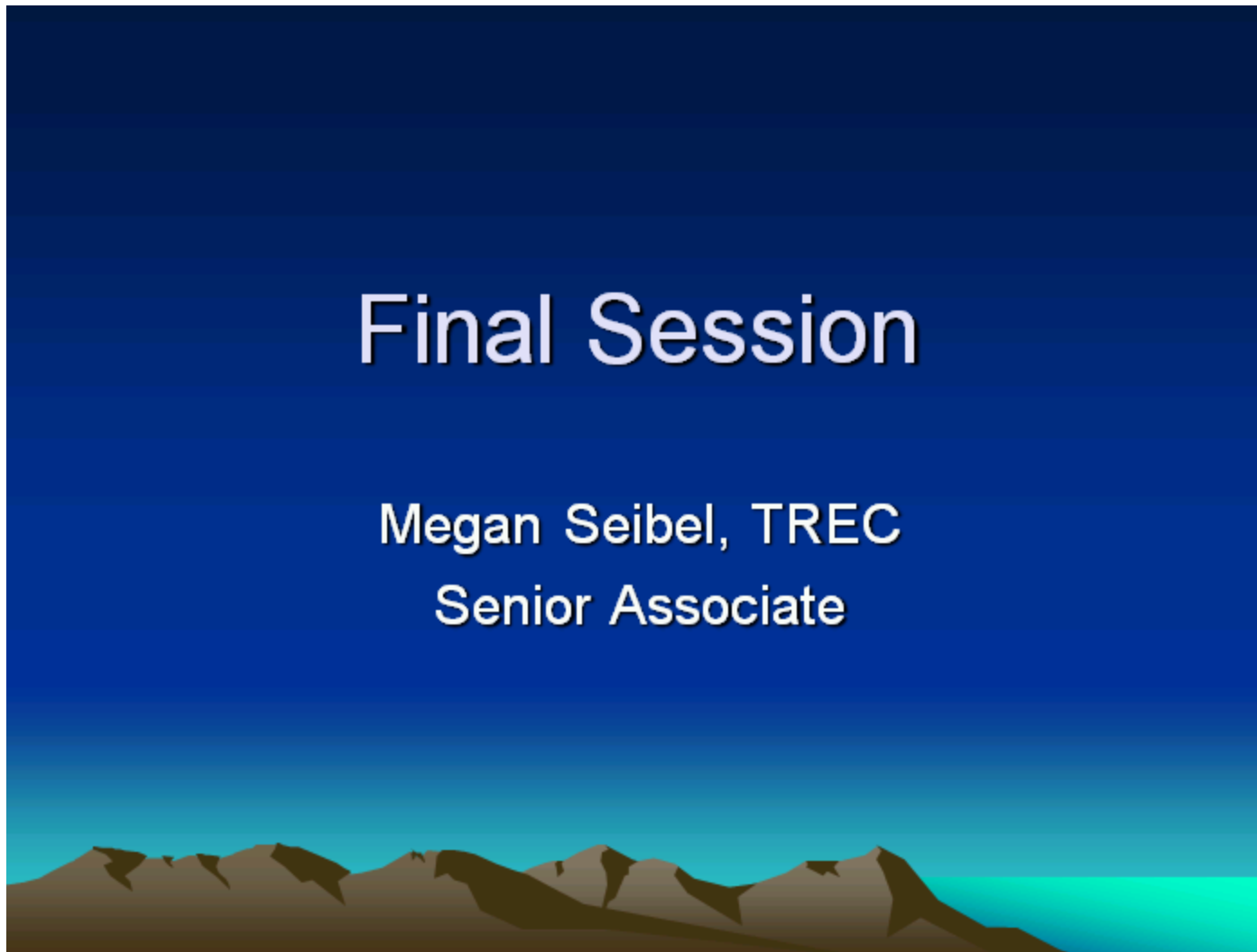


# Fundraising for the Future

TREC

*Training Resources for the  
Environmental Community*

Fundraising for the Future



Final Session


# Introductions: How is 4<sup>th</sup> Quarter Fundraising Going?

Introductions: How is 4th Quarter Fundraising Going?

# Agenda

- Review of the major themes of the Fundraising for the Future Series
- The Fundraising Plan
- Enlisting help and building a team
- Goals for next year
- Staying resilient

Agenda



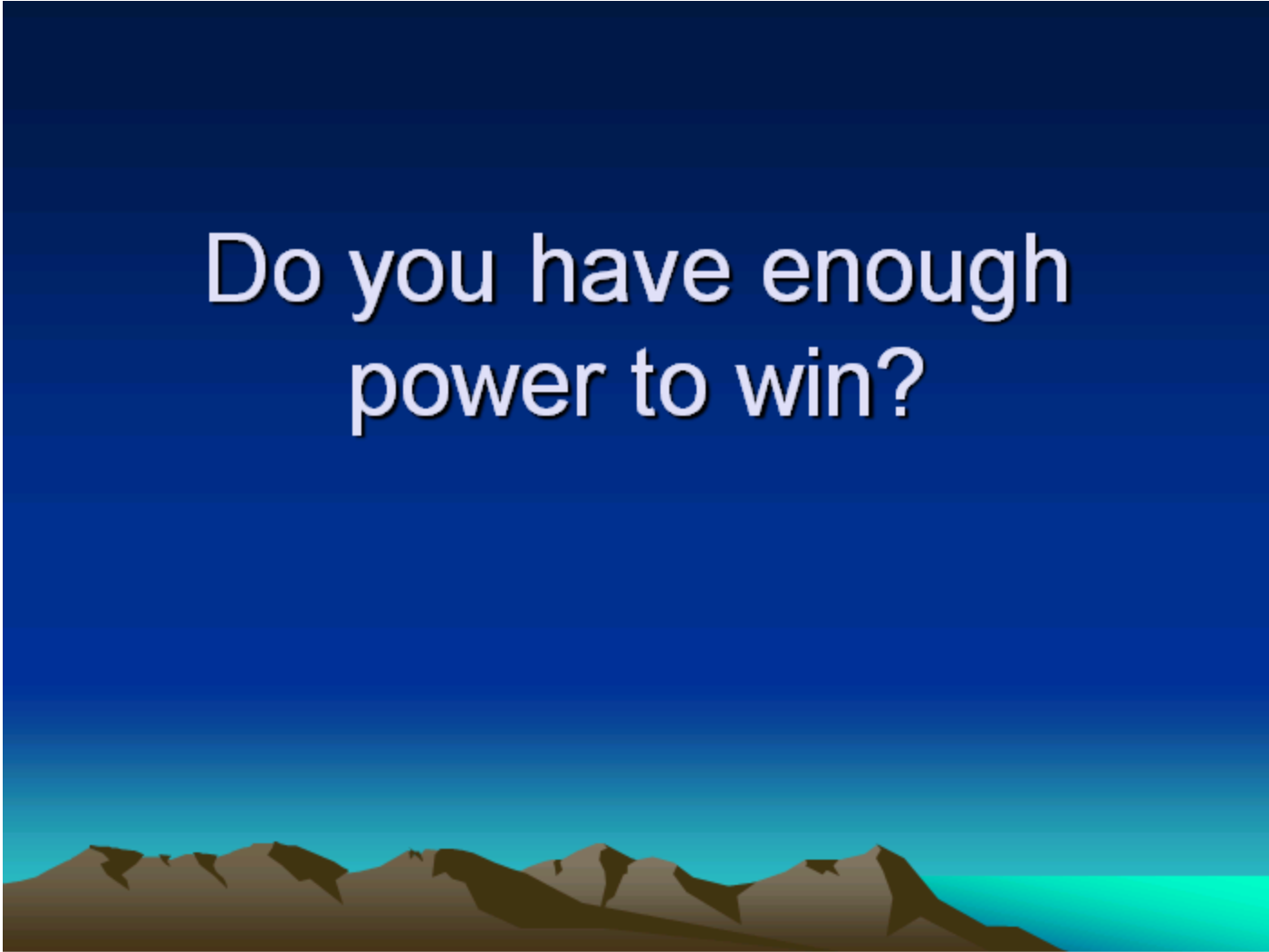
***#1: Fundraising is  
building your  
power base***

#1: Fundraising is building your power base

# What are your assets?

- Great ideas and powerful science
- Committed staff
- Helpful volunteers
- Relationships with VIPs, decision-makers
- Coalition building with like-minded organizations (other groups, funders)
- Community engagement

What are your assets?



Do you have enough  
power to win?

Do you have enough power to win?

## Some of the ways that fundraising builds your power to win

- Build your name recognition
- Community outreach and education
- Feedback on your program
- Community involvement
- Grassroots mobilization
- Identify and involve more volunteers
- Financial support

Some of the ways that fundraising builds your power to win

# Figure out your message

Make it powerful  
Keep it consistent



Figure out your message

## Components of the 30-second Elevator Statement

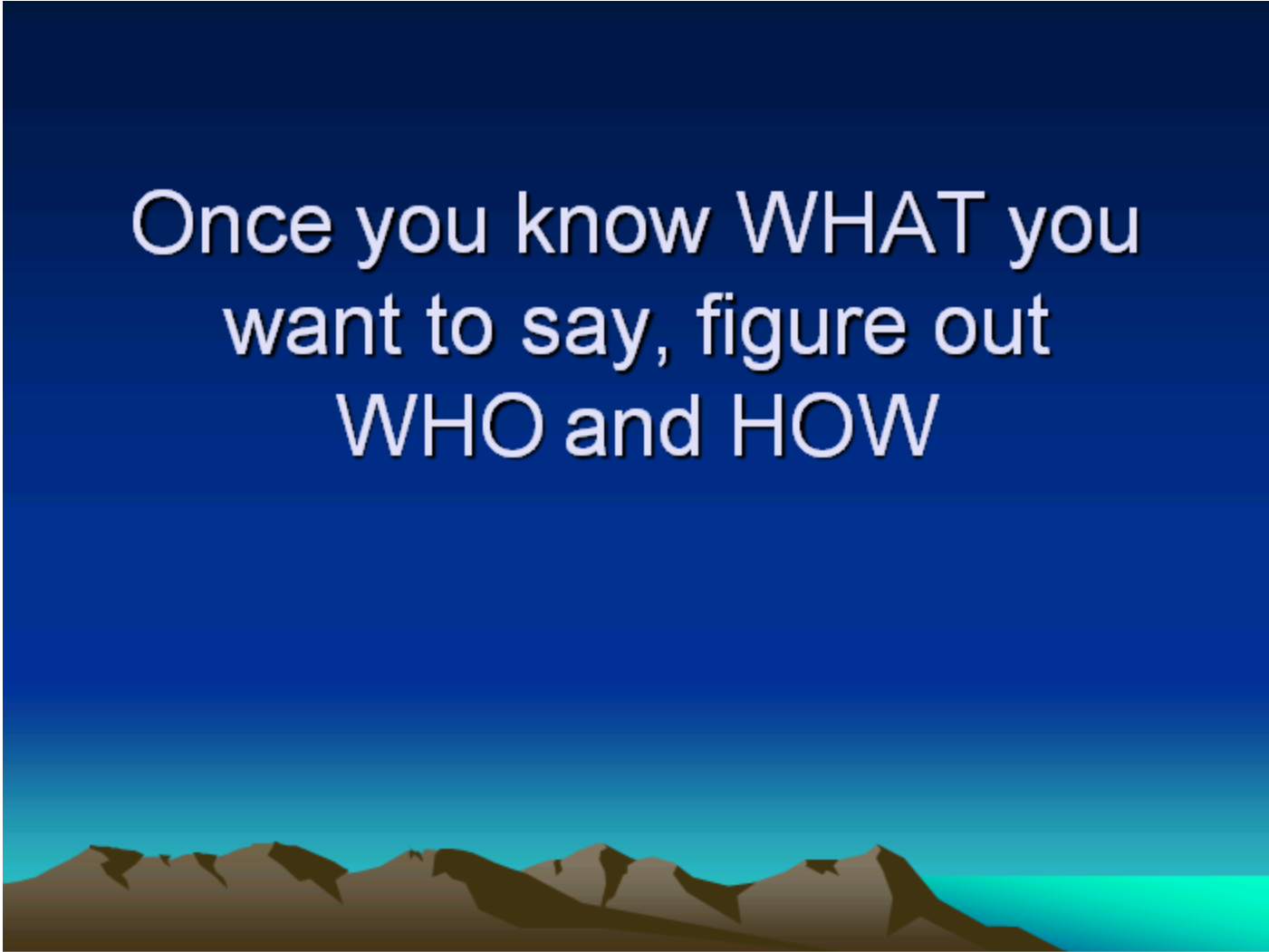
- Organization name
- Connect the group's name to something tangible and close to home
- Problem (urgency)
- Solution (urgency)
- Campaign (urgency)
- Why we are the group to make it happen
- Close

Components of the 30-second Elevator Statement

# Expanding your Elevator Statement into a Case Statement

- Organization name
- Connect the group's name to something tangible and close to home
- Problem
- Solution
- Campaign
- Why we are the group to make it happen
- Close
- Visuals, more examples, a bit of history
- Visuals, more background, more compelling stories
- More examples, key people in the group
- Fundraising targets, timelines, financial information,

Expanding your Elevator Statement into a Case Statement



Once you know WHAT you  
want to say, figure out  
WHO and HOW

Once you know WHAT you want to say, figure out WHO and HOW



***#2: Fundraising is all  
about relationships***

#2: Fundraising is all about relationships

# Who is your audience?

- Your volunteers and friends
- People who have attended events
- Inquiries over phone, email
- Donors and volunteers of like-minded groups
- Environmental donors
- People affected by your program
- Folks who live in a particular region

Who is your audience?

## Methods of outreach for identifying and developing members

- Direct Mail
- Events
- Tabling
- Bring a Friend
- Volunteers
- Phone banks
- Canvassing

Methods of outreach for identifying and developing members

# Matching audience to technique

- Consider cost and staff effort of the specific techniques
- Weigh the importance of a particular audience to your organization
- Approach the strongest prospects with the most effective technique first

Matching audience to technique



## Pick the most effective approach:

• Impersonal phone call	7	3 - 5%, \$
• Fundraising event	8	
• Face-to-face, team of 2 askers	1	25 - 50%
• Impersonal direct mail	6	.5 - 2%
• Media/advertising	10	
• Personal letter on personal stationary	3	15 - 33%
• Door-to-door canvassing	9	
• Personalized form letter (with hand-signed note)	5	10 - 25%
• Face-to-face request, one asker	2	25 - 50%
• Personal telephone call	4	15 - 33%

Pick the most effective approach:

## Up the personalization, up the return rate

- Personalize the mail: add notes from Executive Director or Board members
- Use closed face envelopes and stamps
- Volunteer phone bank
- Face to face asks at tables at events or busy public places
- Board and Staff Get-a-Member Campaign

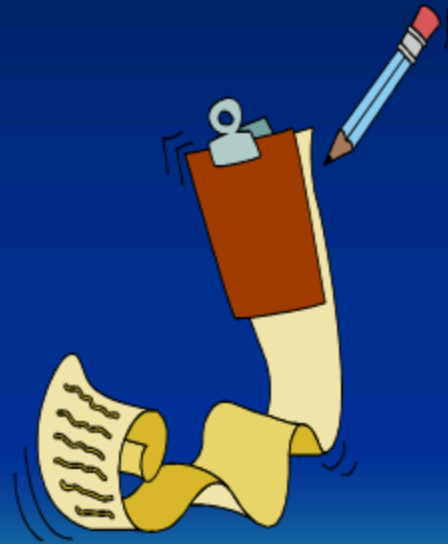
Up the personalization, up the return rate

## Even more personal -- ask the people we know

- A letter from someone known to the prospect can up the response rate to 10 to 20% or higher
- A phone call from someone known can get a 25% response rate
- Bring address books to Board and staff meetings
- “Bring a friend” campaigns

Even more personal -- ask the people we know

# Who are your major donor prospects? (People you know)



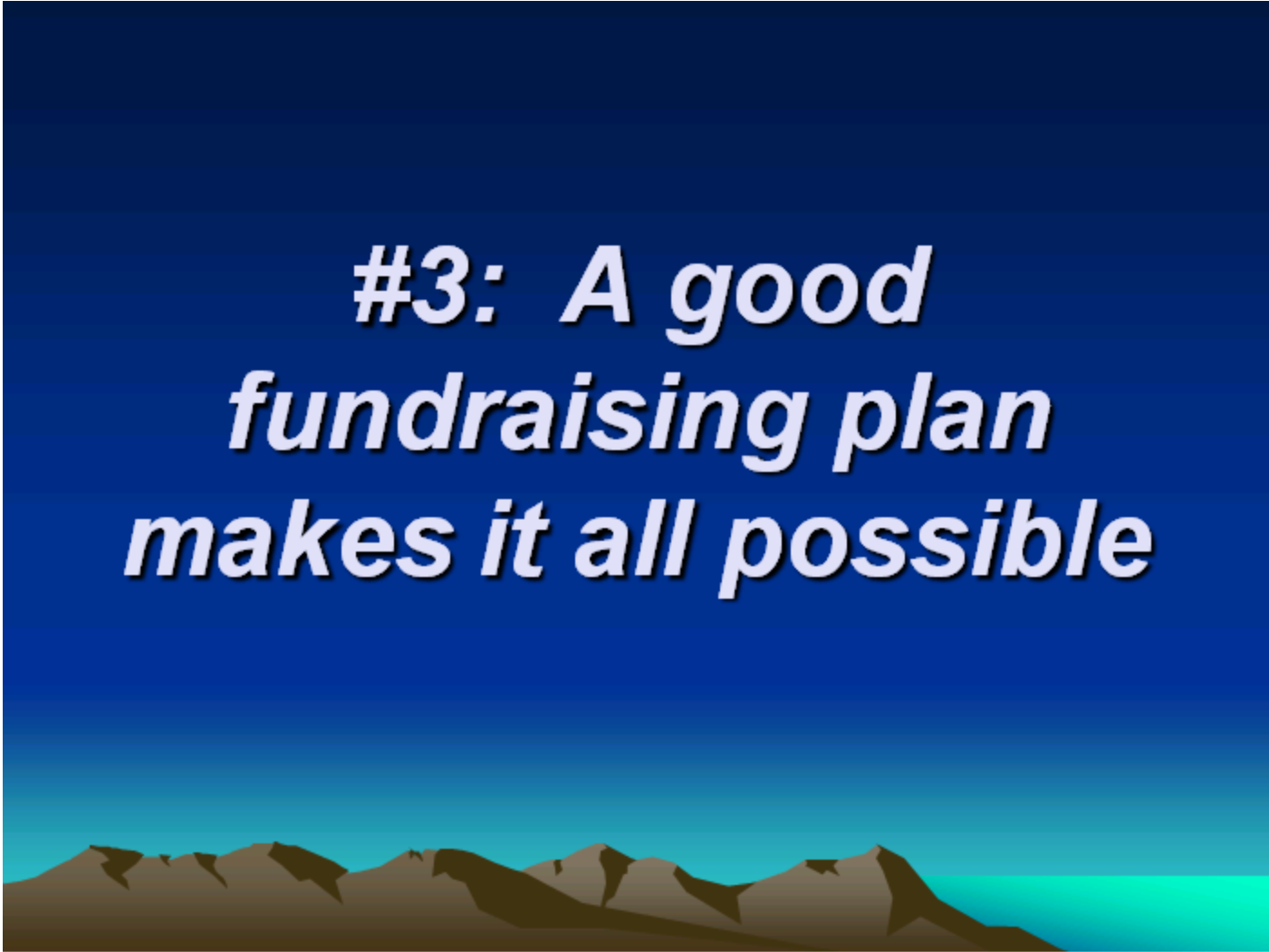
- Board members and other volunteers
- Friends
- Friends of friends
- Donors to your organization
- Donors to similar organizations

Who are your major donor prospects? (People you know)

# Think “Relationships”

- What connections do you have with potential donors?
- How can you maximize that connection?
- What can you do to build the connection over time?
- How can you make it a lasting relationship?

Think “Relationships”



***#3: A good  
fundraising plan  
makes it all possible***

#3: A good fundraising plan makes it all possible

## Pick a few key strategies

- Proven successful
  - Based on your organization's history
  - Based on general fundraising trends
- Integrate well with organizational mission and program opportunities
- Take advantage of people assets
- Diversify

Pick a few key strategies

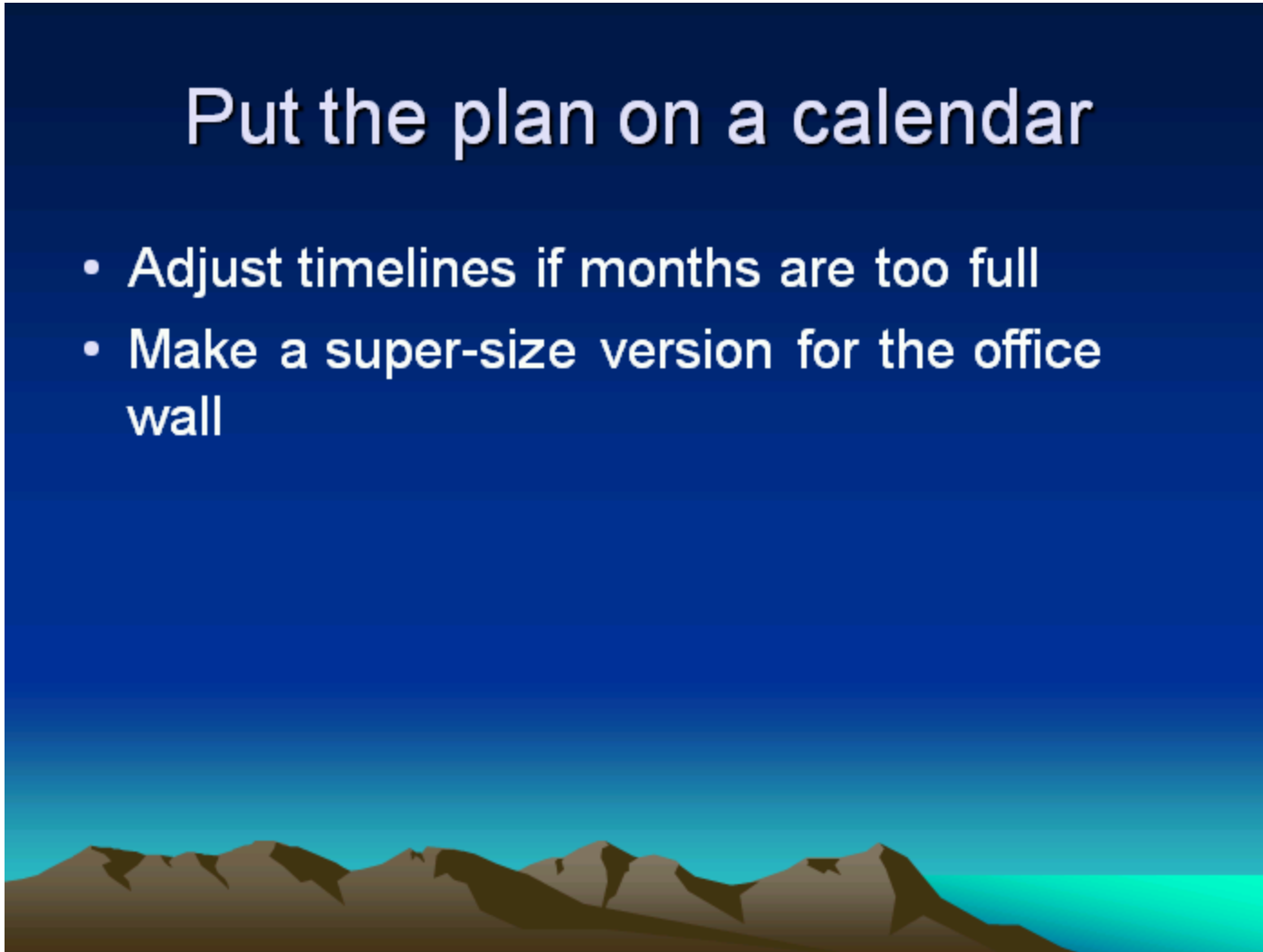
# Compiling the plan

Fundraising Plan: Sample Organization				Date:	Jan-Dec 2006
STRATEGY	GOAL	ACTION STEPS	WHO	TIMELINE	Non-Staff COSTS
Monthly Donors	100 New Donors	1. Profile donor in newsletter 2. Add to appeal cards 3. Do special appeal in the fall	Helen Jen Jen	April April Sept	\$0 \$0, with reprint \$850
New Member Acquisition	50 New Members	1. Tabling at Earth Event	Staff/Volunteers	May	\$150
Renwals	200 out of 280 (71%); \$4500	1. Do 4 mailings to current members 2. Call unrenewed members	Jen Board	Jan, Apr, Aug, Oct Dec	\$800 \$100
Special Appeals	\$3,200	1. Do 4 mailings to current members 2. Call members who renewed \$50 - \$200	Jen Board	Jan, Apr, Aug, Oct Dec	\$650 \$100
Major Donors	\$12,000 1 @ \$5,000 4 @ \$1,000 6 @ \$500	1. Research names of potential donors 2. Send letters 3. Call to schedule meetings 4. In-person meetings	Jen Tom Jen Chris & Board	Feb March April May and June	\$250 \$325 \$0 \$150

Compiling the plan

# Put the plan on a calendar

- Adjust timelines if months are too full
- Make a super-size version for the office wall

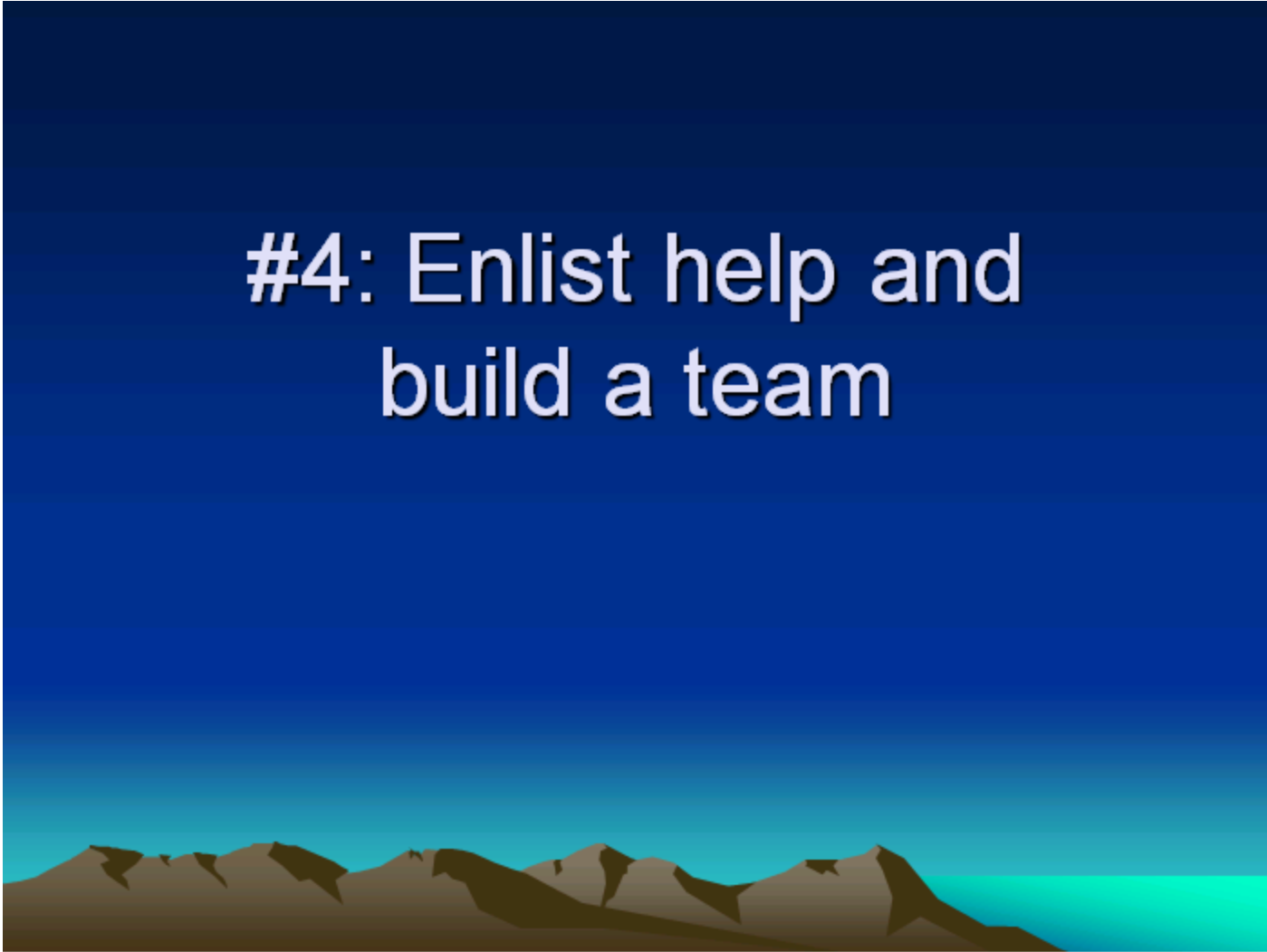


Put the plan on a calendar

# Revising the plan

- Formally review actual compared to plan at least quarterly
- Make adjustments to reflect new trends and opportunities

Revising the plan



# #4: Enlist help and build a team

#4: Enlist help and build a team

## Start with recruiting a fundraising planning team



- New ideas from fresh eyes
- Integration with program plans
- Greater understanding of your job responsibilities
- Buy-in to the plan
- Recruit helpers

Start with recruiting a fundraising planning team

## Who should be on the planning team?

- Board Members
  - Entire Board
  - Fundraising Committee
- Staff
  - Development and Executive
  - Program
- Volunteers



Who should be on the planning team?

## Identify and recruit people to help implement the plan



- Identify people assets
- Brainstorm helpers
- Consider how to integrate fundraising into work they are already doing
- Assign helpers to tasks

Identify and recruit people to help implement the plan

# Involving the whole organization

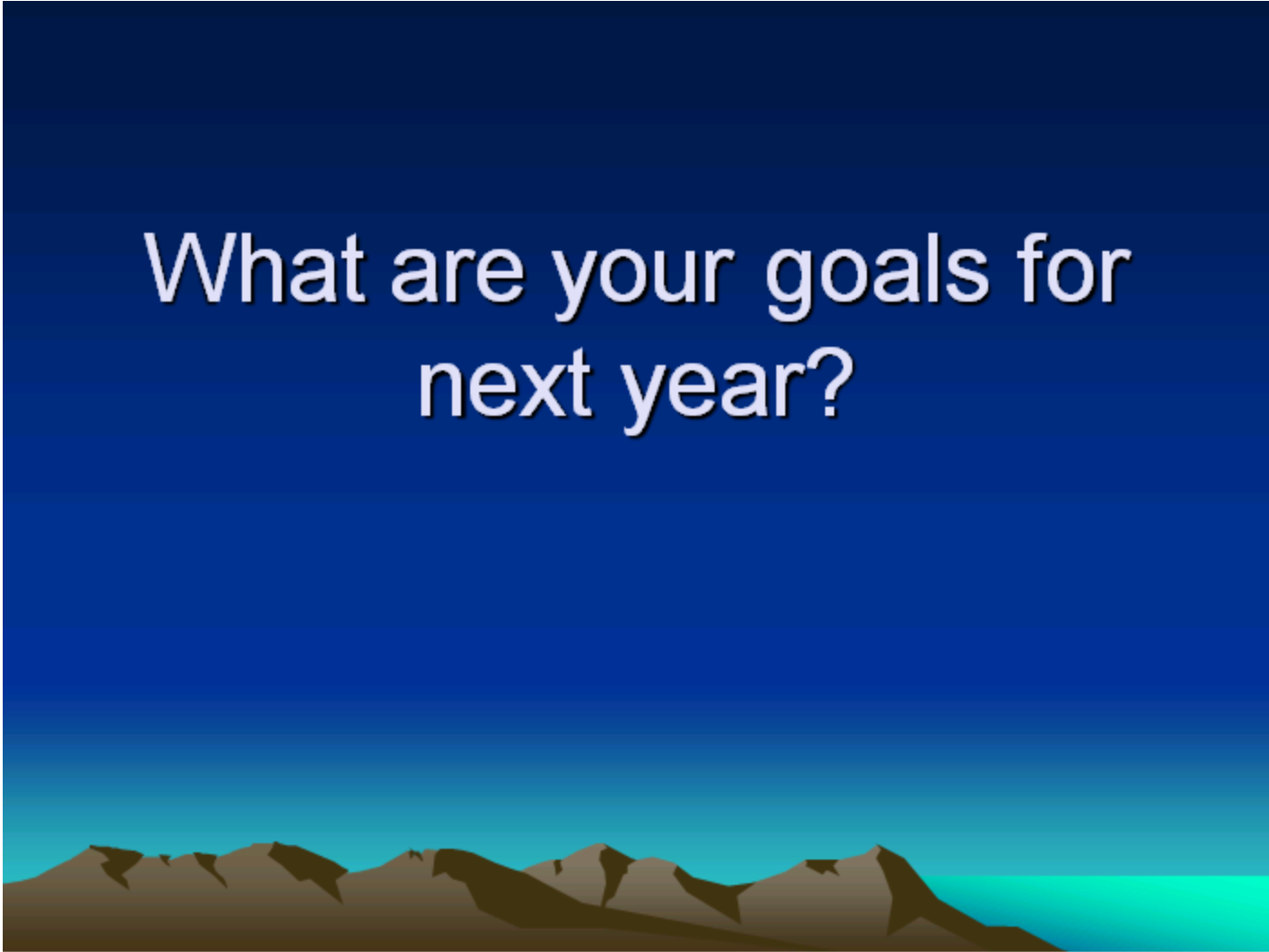
- Team sign-off (includes Executive Director)
- Board sign-off
- Input from staff
- Reference regularly during staff and Board meetings
- Calendar on the wall

Involving the whole organization

# Homework Assignments:

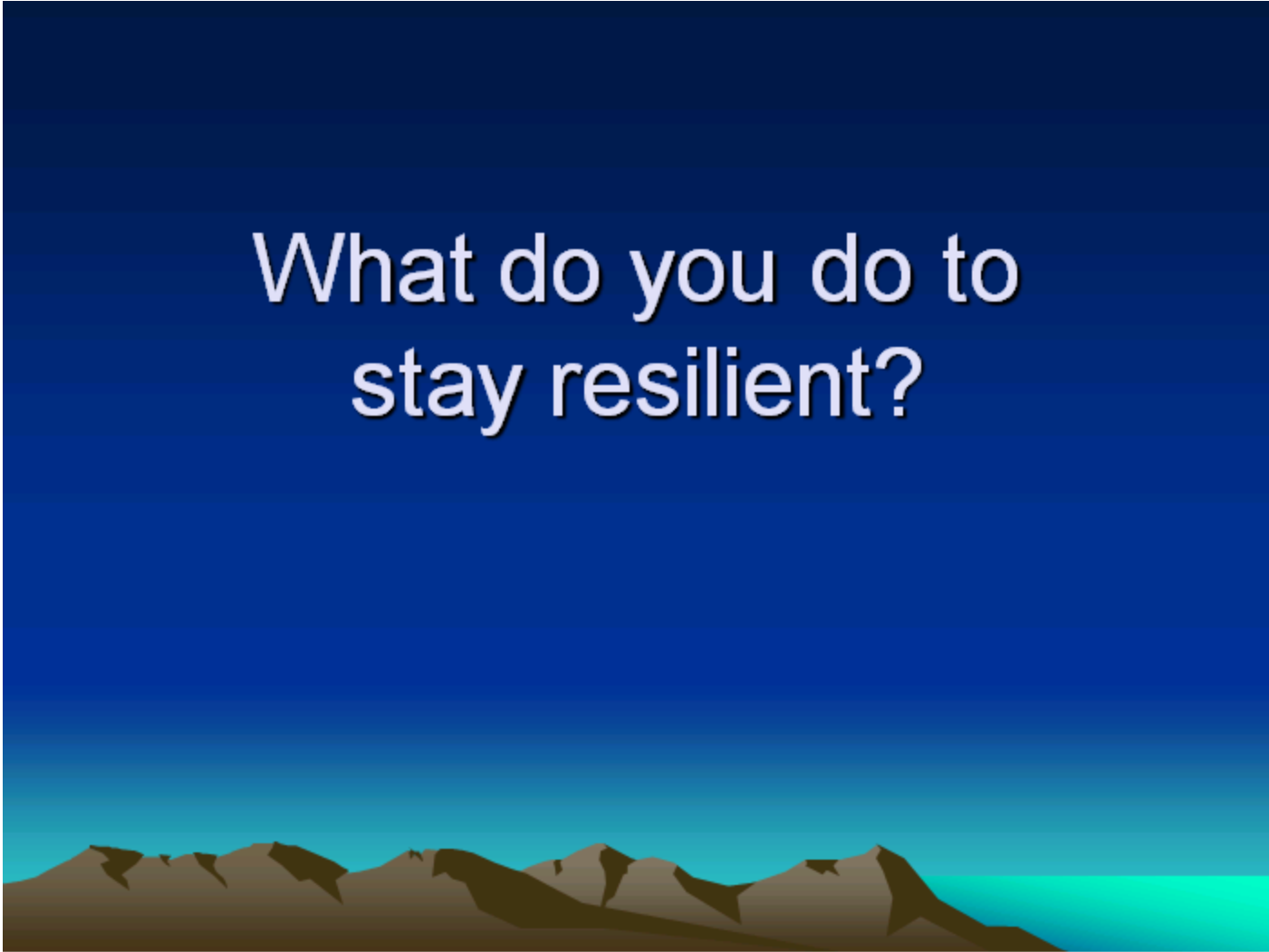
2010 Fundraising Plan  
Evaluation of Series  
Benchmarks

Homework Assignments:



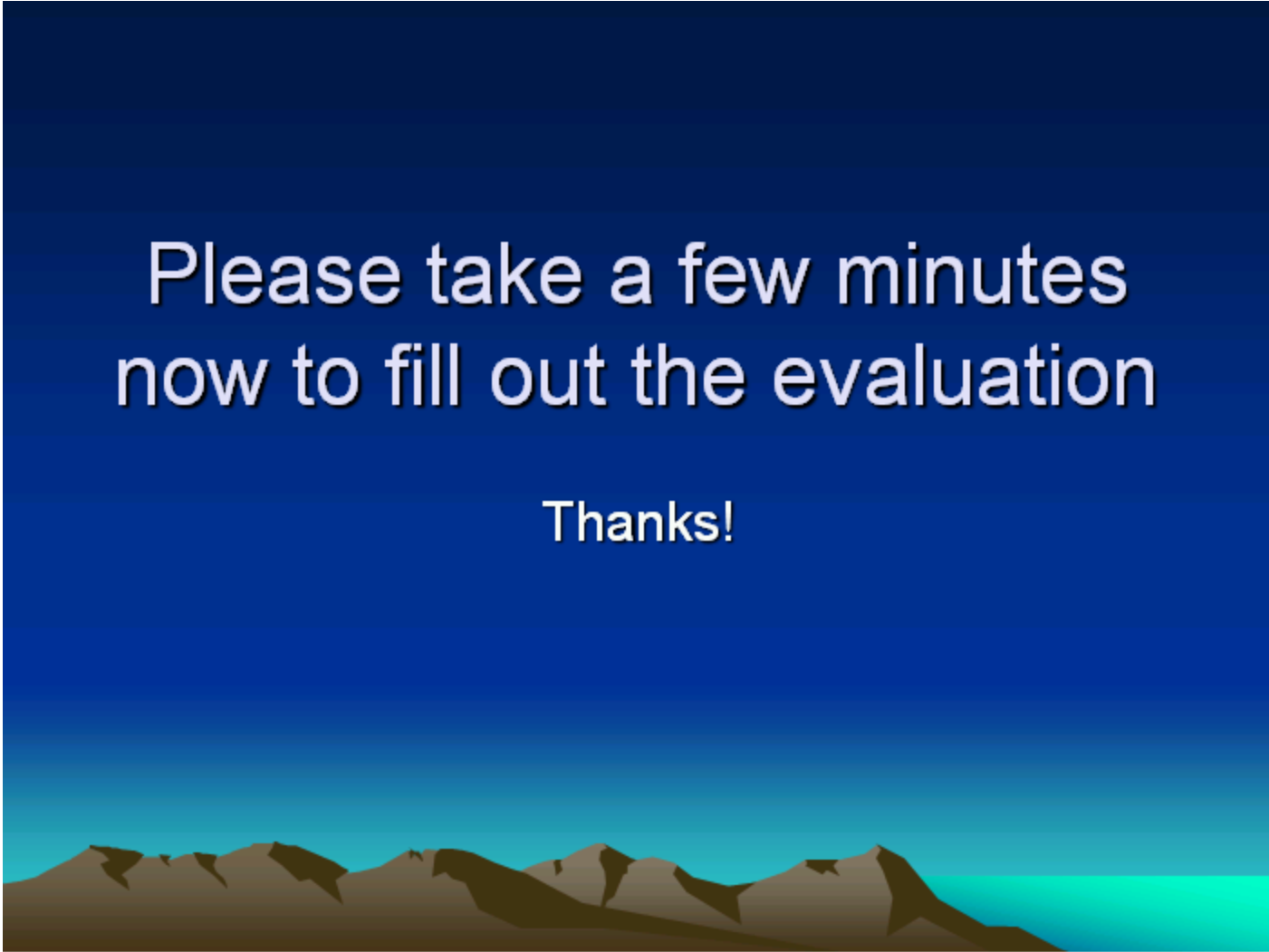
What are your goals for  
next year?

What are your goals for next year?



What do you do to  
stay resilient?

What do you do to stay resilient?



Please take a few minutes  
now to fill out the evaluation

Thanks!

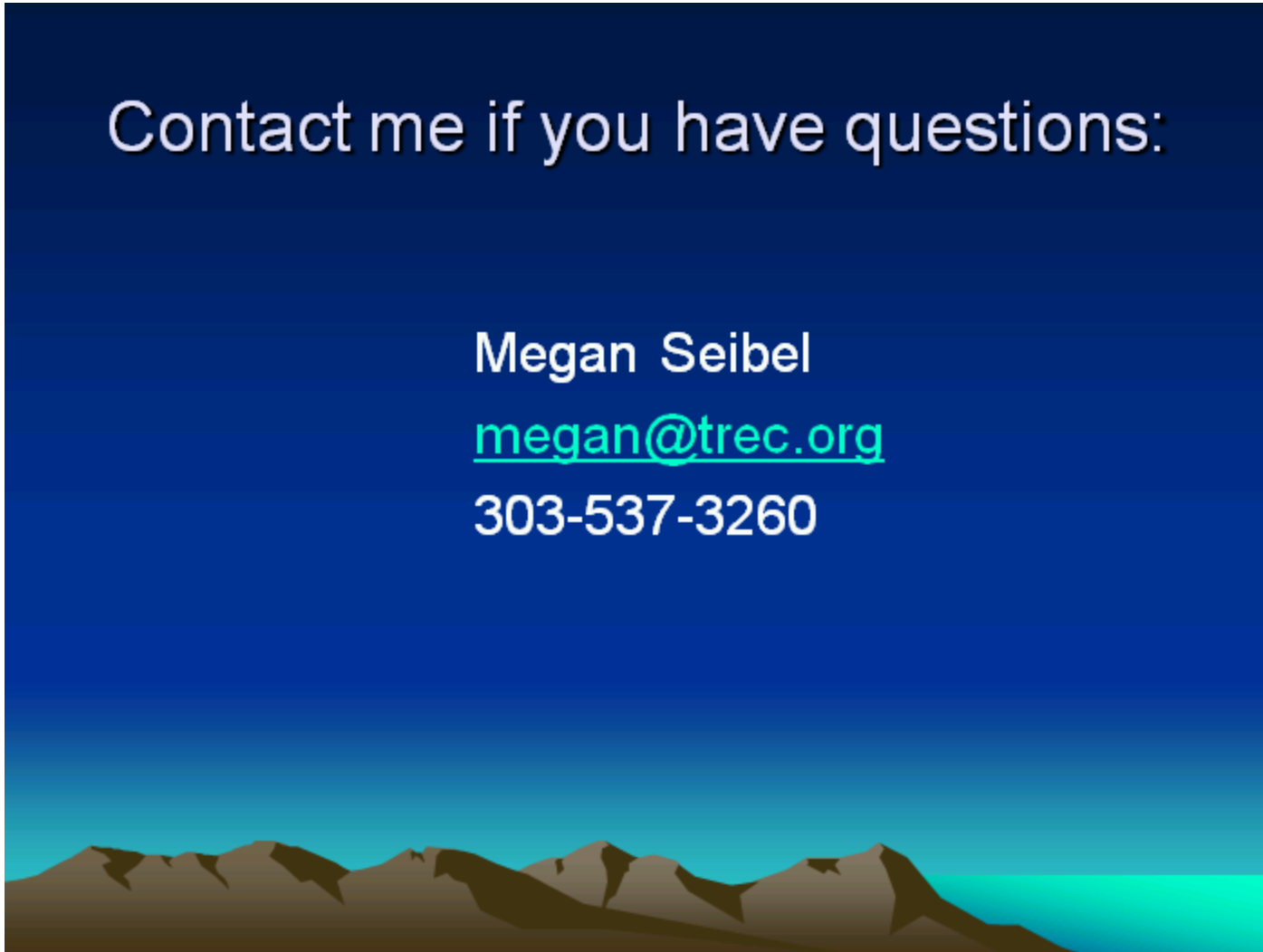
Please take a few minutes now to fill out the evaluation

Contact me if you have questions:

Megan Seibel

[megan@trec.org](mailto:megan@trec.org)

303-537-3260



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