

**fundraising  
academy**  
CAUSE SELLING EDUCATION



**Jack Alotto, MA, CFRE**  
*Fundraising Fundamentals training with ECCCA*

**DO:**

- Welcome participants.
- Remind students to close out of other internet-using programs. They should only have the Parking Lot and Participation Guide open on their computer to avoid connectivity issues.

# TODAY'S AGENDA

Who I am.

Who are you?

What I've learned.

What do you want to learn? Back in June.

Securing the Gift

Key Fundraising Foundations

Your Board: what should they be doing?

Other

June Meeting – what should I be back with?

Let's start a nonprofit – the planning model.

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Giving is an act of Love, heart-centered activity, donors give to shared values. Shared Vision. Shared Mission.

Donors want to make the world better and they see YOUR organization as a way to accomplish this goal. Impact/emotional giving.

Giving is about relationship, not money or numbers – donors share values, mission and vision with your organization.

Giving is NOT about your needs it's about the donor's passion, values and needs. Donor Centered Fundraising is the most successful way to acquire donors, retain donors and cultivate move donors to higher giving levels (moves management).

The Board's role in fundraising is inescapable.

Successful fundraising organizations see as a core value – A Culture of Philanthropy  
It is easier and less costly to retain a donor than acquire a donor.

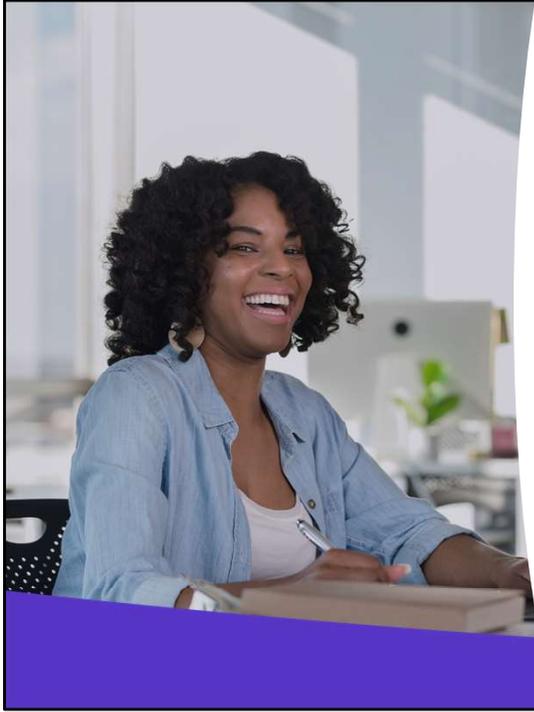
Donor motivations

1. Awareness of the need and the desire to help the recipients
2. Trust the organization to use the gift effectively and responsibility
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4. Tax benefits
5. Personal connection to the organization

6. Motivated for unexpected giving – pandemic
7. Online giving – motivators include social media influencers, celebrities or politicians.

### Donor Characteristics are giving

1. Giving is a heart centered activity – it's not a transaction
2. Give for religious reasons – Jews, Christians,
3. Social reasons
4. Friends
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## ***Securing the Gift*** ***A Brief Fundraising Cycle***

- **Prospect Research**
- **Cultivation**
- **Solicitation**
- **Stewardship**

**Describe the fundraising cycle:**

## **Prospecting – let's find some donors**

- 1. What is it?**
- 2. Linkage, Ability and Interest.**
- 3. How are you doing it? Shout out.**
- 4. Methods**

Prospect research – techniques to learn more about donors' personal background, past giving history (connection), wealth indicators (capacity); philanthropic motivations (compatibility) to evaluate a prospect's ability to give and affinity towards the organization. What are you trying to find out?

We can use technology or public information to obtain this information.

The most potential pool of donors is found within the

networks of your board of directors

Ongoing

Selective – segmented donors (our fictitious nonprofit), targeted

Confidential

Accurate

Personal – donors themselves will supply and verify information you collect

Must coincide with funding needs

how does your organization prospect research? Use technology? What software? Other techniques? Similar organizations? Board members? Other donors especially major donors? (3 minutes)

Methods of Prospecting 1. Referrals – most powerful prospecting tool available to fundraisers – referrals from board? Other major donors? 2. Center of Influence – person believes in your cause and is willing to give you names and help qualify them. (Board Member initiative) 3. Event Prospecting – gala, or just an information event. Say

around the census – capturing names, -- then creating a plan to engage them in your cause. 4. Direct marketing through mail and email – creating a target acquisition list of individuals and sending them a direct mail or email – hospitals with patients; colleges and schools with alumni or student parents. 5. Direct marketing through social media – use social networking to grow their loyal donor contingency – LinkedIn with alumni groups, CFRE groups, etc. Or Facebook groups (my high school group/ and elementary classmates) 6. Warm Calling – calling on a lead without first making an appointment as long as there is sound reasoning 7. Networking – share information about the nonprofit with other influencers 8. Organization initiated prospecting – software to get leads (anyone use this?) 9. Websites – collecting names of prospects who come to your website, LinkedIn page, Facebook group.

Back to our fictitious organization.

## Cultivation

*Let's build relationships*

1. What is it?
2. Give me 3 examples. Shout out.
3. Cultivation Conversations.
4. What it does



**Cultivation** – developing interest through exposure to the organization's programs, activities, and people. Letting donors

know that the organization is dedicated to its mission and how their gift advances that mission.  
It's all about values.

What does cultivation do:

1. Moves prospects to active supporters
2. Improves relationships
3. Moves donors to a higher giving level – moves management
4. Determines connection, capacity and compatibility
5. Brings about a transaction
6. Seeks to discover what's important to the donor (donor centric)

give us 3 examples of cultivation your organization engages in with a prospective major donor. For example: donor Jack is referred to your organization by a board member/other major donor what do you do next? What is your cultivation plan for this donor?

Cultivation Plan – touch points with donor jack?

Personalized cultivation plan with goals for this major donor; steps to get there.

### **Cultivation questions for donor prospects: let's role play**

1. Mission, vision, work, priorities (open ended questions)
2. Philanthropy and giving interests
3. Attitude and values
4. Testing for readiness and commitment

Some Cultivation Strategies: • Tour (site visit) of the organization. • Lunch or coffee meeting; meet with a board member, program manager or volunteer who invited the prospect to learn more about the organization. • Handwritten note, especially after a site visit. • Valentine's card in February – Birthday card – Hanukah Card, etc. some organizations send handwritten cards on the anniversary of the organizations founding. • Send

newsletters, emails with important updates, all of these are personalized. • Arrange for a program person to call your donor and give them a first-hand account of what an impact the donor is making on the program. • Call donors you are cultivating for a larger gift, just to say thank you. Use your board members strategically here. • Ask your donor to help you solve a program problem (not a personal problem).

Ask for advice. Other: CULTIVATION

CONVERSATIONS • Update your donor database with all your donor communications. • Ask your donors to suggest improvements to your program. • what are some of the other ways we can involve our donors in our organization?

- Cultivation moves prospects to active supporters and current donors to higher giving levels, especially major gift status
- Cultivation builds, improves and deepens relationships between donors and your organization
- Cultivation determines connection, capacity, and compatibility (usually done via research with or without software)
- Cultivation seeks to discover what is important to the donor and what motivates them to give to your organization

## Solicitation

1. Donor Acquisition
2. Use of Volunteers
3. Creating a solicitation plan (LAI)
4. Board members – shout out.
5. Get it right.

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### Donor Acquisition

1. Use your CRM to identify key segments and profile your average donor
2. Once you know your average donor, identify unreached groups who have a similar characteristics
3. Use 3<sup>rd</sup> party company to perform donor research on prospective donors
4. Targeted outreach based on findings
5. Vehicles for donor acquisition:
  - Direct mail
  - telephone solicitation
  - social media
  - Digital display ads
  - Email
  - Tell me others you use.

### Some ways to acquire new donors

1. Define the unique selling proposition of your organization – why are you wonderful? What are you

good at? What makes you so different that all of your competition?

2. Define your urgency: why do you need action today, tomorrow, in the future? What will happen if action is not taken? Has something in your organization changed?

3. Define why a person should care? How will the donor's investment make a difference?

4. Don't lead with your history? History is good, but donors are not investing in your history (the past) they are investing in your future. Don't lead with your magnificent past in your eyes – lead with your future aspirations, you value.

5. Look to your board members circle of influence

6. Event attendees

7. Volunteers

8. Support on social media – thumbs up on Facebook, or LinkedIn

9. Direct Mail Prospecting

10 Online Direct Response Prospecting – for profits do this all the time, If I want an article on “2020 Trends” they ask for my email. Then they solicit me.

11, Referrals – people won't make referrals unless you ask

12. Non ask events (cultivation events)

13. Networking events (rotary)

14. Cold calls – have an affinity for the organization and an

interest.

15. Websites of similar organizations

16. Crowdfunding and P2P

This is where you ask for a gift.

Use volunteers – train them, orient them,  
Way more effective at asking if they are properly trained.

What is a solicitation plan? Remember LAI

Board members are most effective in peer-to-peer fundraising. Who is using board members in the solicitation process.

Right person asking the right person for the right amount.

Prepare donor centric materials.

In person.

Back to our fictitious organization.

## Stewardship

1. What is it?
2. How are you doing it?
3. Do you have a Plan?

**Stewardship** – managing and protecting donor gifts to ensure that they are used as the donor intended. Recognizing donors and reporting back to them, protecting their privacy. Give donors confidence that their gift was handled, telling donors how their gifts were used gives you a buy up on asking for the next gift.

### Stewardship

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- It's about maintaining and evolving long-term relationships with donors
- It's about the donors knowing that their gift is valued and put to good use
- It's about engaging the donors in the programs and encouraging them toward regular repeat giving and increasing their gift
- It's about engaging the donor in your organization

**See you in June**  
**Send me your questions**  
**[alottojack@gmail.com](mailto:alottojack@gmail.com)**

# TODAY'S AGENDA

**Let's Revisit our nonprofit**

**Fundraising Foundations**

**The board's role, your role**

**Donor Fatigue**

**Monthly Giving**

**Marketing and Communications**

**Case for Support**

**Website Audit**

**Diversifying your fundraising efforts**

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# Fundraising Foundations

**Culture of  
Philanthropy**

**Donor  
Centric  
Fundraising**

**Keeping  
Donors**

Let's review our new nonprofit that we created in May

# Culture of Philanthropy

**Attitude.**

**What organizations with a Culture of Philanthropy look like.**

ATTITUDE: A culture of philanthropy requires that every employee, board member and volunteer understand, prioritize, encourage, model and celebrate philanthropy.

**Everyone** recognizes that philanthropy is vital to achieving the mission of the organization and their role in helping to secure gifts.

An organization wide **attitude of gratitude**. Everyone expresses gratitude. It's about the donor's needs, wants and passions and not about the organizations needs wants and passion. **It's not about your programs it's about how your programs fulfill the needs, wants and passions of your prospects or donors. THE AGE OF COVID 19 REQUIRES AN EXTRA LAYER OF CARE AND CONCERN IN ADDITION TO GRATITUDE.**

Requests for gifts are based on shared desire to meet community needs.

Donors and organization celebrate outcomes/results in the spirit of giving.

All publications feature/describe impact and donor's role.

Website has online giving, interactive and dynamic content.

Philanthropy is modeled by CEO and encouraged at all staff levels.

Management, staff and board understand how philanthropy drives mission.  
Staff and board refer potential donors, participate in cultivation and stewardship activities and give regularly.

CDO reports to CEO, is a **member of executive leadership**, attends and reports at board meetings

Fundraising is seen as a revenue center, ROI is valued, and the organization invests in development.

100% board participation in asking, thanking and giving.

# Donor Centric Fundraising



**What is it?**



**What does it look like?**



**How do you do it?**

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Donor centered fundraising is foremost the adoption of an attitude of gratitude. This means feeling and expressing gratitude for every gift that walks in our door, no matter the size of the gift.

1. DCOs research what donors want.
2. DCOs thank donors for their gifts; inform donors how their money is spent; respond quickly to donors questions; are polite in communications.
3. DCOs put donors at the center: “because of your gift, we do this vital work”; “your gift makes our work possible”; “because of you, we...”.
4. DCOs keep donors informed on how their gifts were used and donors know that their gift is spent appropriately.
5. DCOs is like customer-centered and donor centered. When you are customer-centered and donor-centered you build loyalty – loyalty = donor retention and legacy gifts!
6. DCOs don’t see their donors as ATM machines. Giving is not a financial transaction – it is an act of love!
7. DCOs pay attention to the emotional needs of donors. Emotions trigger

decision about giving: love, anger, exclusivity, greed, guilt, salvation to name a few.

## Donor Retention

It's about Relationships.

Donor Retention Strategies

Stewardship and Cultivation are **relationship building strategies, relationships are at the heart of fundraising,** many of us believe that in-person nature of cultivation are critical in establishing that relationships how do we do this in the virtually? Ask yourself, how did you bring people closer to your organization before Covid 19? And now? How did you let donors know that you were dedicated to your mission and that their gift advanced that mission? And how do you do this now in the age of Covid 19?

Some donor retention strategies:

Build a donor focused approach to stewardship and cultivation.

Provide excellent customer (donor) service

Follow up in a timely manner

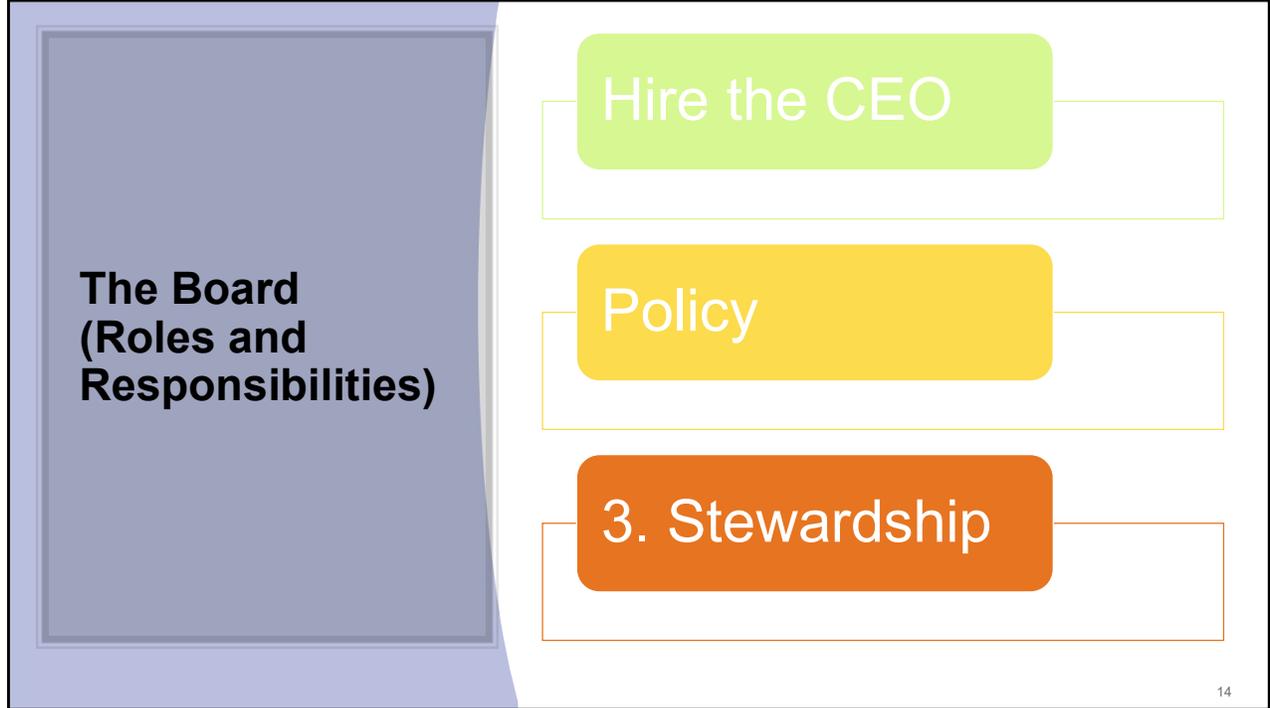
Communicate constantly

Provide evidence of value from the investment the donor has made

Follow up with lapsed donors

Don't ask donors to give again until you give them a platform to express their reasons for not continuing to give.

Make giving convenient and encourage monthly giving.



The Board's role in fundraising is inescapable.

Successful fundraising organizations see as a core value –  
A Culture of Philanthropy

It is easier and less costly to retain a donor than acquire a donor.

## **Board**

Your job:

- to lead, inspire, motivate, and support, *and encourage your board members.*
- Create joyful Ambassadors, Advocates, & Askers.

- *Every* board member is part of your Fundraising Team!
- Create a dynamic Fund Development topic for every board meeting.
- A solicitation role-play at every board meeting.
- Brainstorm cultivation strategies at board meetings.
- Highlight a successful major gift “ask” that involved a board member; ask them to describe what worked, get them to highlight a successful new major donor.
- Put the “fun” into *fund*raising and eliminate anxiety & fear.
- Tailor Major Gifts work to each member’s interests and comfort level.

Individual Engagement Plan for each board member also called a board commitment form

- The “IEP” is a road map that charts how a board member will contribute his / her time, talent and treasure on behalf of your organization over the year.
- Each board member meets with the ED or DD *and* the Board President or Development Committee Chair at the beginning of the year to design his or her IEP.
- Monthly check-ins provide support and keep board members engaged and accountable.
- Special skills, expertise, and professional or community affiliations
- Board Committee service (desired / already committed

to).

- Particular program interests that each board member has.
- Personal Giving: Board Gift *plus* Endowment, Capital, or other Special Campaign gifts; participation in Fundraising Events; and a Planned Gift which is documented or being considered
- How they will participate in cultivation and stewardship activities?
- Identify at least three friends, business associates or organizations that they agree to *personally* cultivate or otherwise engage as a potential board member or major donor).

## Other

Donor Fatigue

Monthly Giving

Marketing and Communications

Case for Support

Website Audit

Diversifying your fundraising efforts



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## Donor Fatigue

Phenomena where a donor stops giving to your organization or non-profits generally.

Signs:

1. Reduced frequency of donations
2. Smaller donations
3. Unresponsiveness

Donor fatigue may be symptomatic of a bigger issue – lack of something – cultivation or

## stewardship

### Causes:

1. 2 many requests
2. You don't understand their interests or why they give
3. Generic Asks

Or the ask may be mismatched with donor capacity  
(college tuition is due)

1. Ill-timed asks – when you send a request soon after you received a gift.
2. Fades sense of urgency – urgency at the beginning of the pandemic, and overtime it starts to wear off
3. Lack of transparency in communication, messaged do not clearly communicate the purpose or the impact of donations.

### **Overcoming Donor Fatigue**

1. Regular screenings – wealth screenings technology or past check-ins
2. Segment your donors, especially around propensity and capacity to give
  - Annual
  - Major gifts
  - Less than MG
1. Analyze data -- find patterns – giving patterns to certain campaigns and programs
2. Be Transparent – about where their gift is going

3. Do something special – virtual party for donors, or virtual program view, do not ask
4. Only express urgency when it's actually urgent
5. Offer other ways to give like – P2P; volunteer: virtual fundraisers
6. Keep them in the loop
  - Ask their opinion or get an ONION
  - Share insider information
1. Express sincere gratitude – be authentic
2. Avoid undue pressure
3. Share how they are making a difference having an impact
4. Make them feel like they are a part of your organization –
5. Nurture them – birthday cards; know their interests and maybe send them a book; or forward an article...
6. Keep good records: this is a primary cause of donor fatigue (know their preferred hobbies, method of contact, family members, what types of events they enjoy)?
7. Offer other giving opportunities like monthly giving.

Monthly donors – Classy: the average monthly gift is 55% larger when made through an “automatic clearing house” as opposed to those who just make it with a credit card.

thank just once and perhaps at the end of the year for tax records. End of the year letter could be around impact, plans for the new year, etc. Monthly gifts that meet the major gift level, then do everything as above for

- major donors
- Thank, report back and stay in touch
- Look at other organizations for best practices

## **Marketing and Communications**

Review plans

Marketing is, in its most simplistic form, finding out what people want/need, telling them it's available, and then providing it. One could add it's also telling them (and others) what was accomplished. In a fundraising context, marketing connects donors' needs and interests with the organization's programs and

services that meet their needs. The key point: It's not the money that's important – it's what the money does. Imagine trying to do fundraising without marketing. Imagine what it would be like to market your fundraising activities without planning ahead and figuring out what you want or need to do to accomplish fundraising goals. What would that look like?"

Like any endeavor, you have to know where you're going in order to be able to get there. Marketing is no different. In order to maximize

budget and resources in your marketing efforts, you need to have a formal marketing plan. Otherwise, you're likely to end up with a "shotgun" approach to marketing that is effective only in the short-term, if then. Having a formal marketing plan, and executing it well while evaluating its effectiveness, is a principal part of business success whether an organization is for-profit or nonprofit. Creating a marketing plan requires you to think strategically about the organization's mission and vision, and how it can be accomplished. It is based on the

work you've already done to create an organizational mission and vision. It articulates the strategy you will follow in letting others know about your activities, including who those others should be and what they should know. Do any of your volunteers or staff colleagues ask you to issue a press release or set up an interview with the local media to tout how great the organization is? Or perhaps they ask you to promote how you're raising money, or a targeted fund amount? That's exactly how some people approach marketing: with the idea that "we

have to tell people how great we are.” An engaged volunteer – sometimes even a staff member – thinks everyone should know and care about all the good things the organization does. This is exactly the opposite of what a good marketing program does. A successful approach to marketing comes from the point of view of the target audiences, answering for them the question, “what’s in it for me? Why should

Activities generally a part of marketing – research as to what programs to offer; segmenting markets (know your audience); messages; time frame; setting marketing goals; planning institutional strategies; budget and resource allocation; getting the word out and hearing from constituencies; public relations; evaluation.

? Why should I get involved/donate/  
work with this organization? What  
has this organization done or will it  
do to affect me in my life

Communications is a key part of marketing

### **Case For Support**

The Case for Support is the general argument for why a nonprofit deserves gift support. It is the foundation upon which fundraising is built. It is a call for a solution to a problem, the meeting of a need. It is the expression of the cause. You must get

others involved in the development of the case (you've heard me say this). When you invite others to have a role in the Case's development you get ownership and enthusiasm. What are you going to do, how are you going to do it, why are you going to do it, who benefits, who is hurt if you fail.

2. It is your job to interpret the concerns, interests, and needs of the external constituencies while also

articulating the needs  
statement of the organization.

3. The Case for Support is  
the encyclopedic  
accumulations of information.  
Parts of the Case for Support  
are used to argue that the  
organization deserves support  
for the work it does.

4. A case statement is a  
particular expression of the  
case. It is a specific  
illustration of some of the  
elements that make up the  
case. It highlights critical  
factors important in arguing  
for gift support.

## Case Resources

1. You begin your case statement by getting information elements that provide background information for everything a donor wants to know about your organization. That's Case Resources.
2. These case resources provide the information upon which the case statement is built.
3. They are the database, an information bank from which case statements are drawn.

4. Case resources consist of the following information elements; **mission** -a statement of the human, societal needs being met by the nonprofit organization. It explains why you do what you do. It's not a goal, it's a value statement -- XYZ is dedicated to providing choices for homeless people seeking permanent housing **Goals** - answers the questions about what the organization does. **Objectives** - are more precise than goals. **Programs and Services** - descriptions

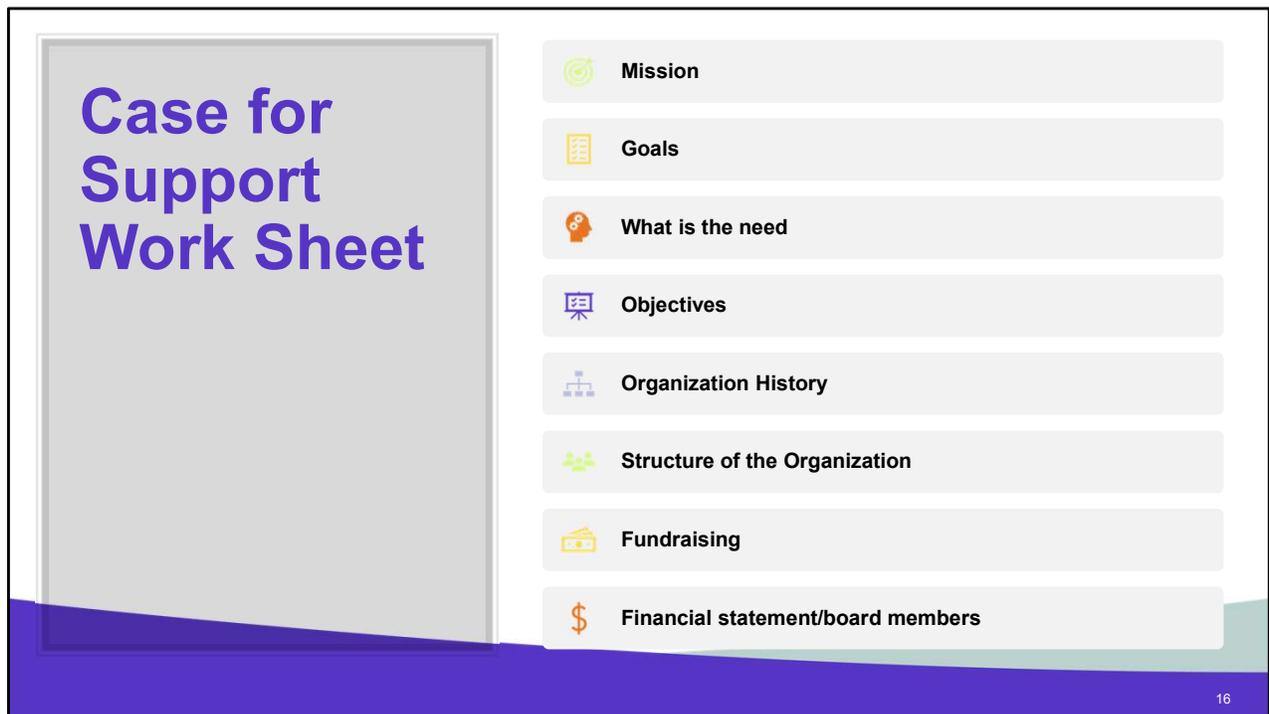
of how the organization provides service to its clients. **Finances** - duh financial information about the organization's budgets and process to create budgets. **Governance** - information about how the board is composed and how it functions. **Staffing** - indicates competence and professionalism. **Facilities and service delivery** - description of facilities and services delivery -- duh. **Planning and Evaluation** - describes the

process used to plan and the measures taken for evaluation. **SO, THE VERY FIRST STEP IN BEGINNING TO DEVELOP A CASE FOR SUPPORT ORIGINATES IN THE ORGANIZATION'S STRATEGIC PLAN.** History - focus on your accomplishments in terms of service to its constituencies.

5. Internal Case and external Case - Internal case is the database of information and knowledge. The internal case prepares the organization to develop

expressions, external case statements for fundraising. The external case is the "case at work" for brochures, direct mail letters, website, etc. The external case's purpose is to stimulate potential donors to make a gift. The external case answers these questions: what is the problem? What service or programs are we doing to respond to this problem? Why are the programs and services important? What constitutes the market for our services? Are others doing

this same work? Do we have a plan and a program? How will we find donors to support the financial needs to solve the problem? Are we competent to carry out the program? Who are the key staff and board at our organization? Who will support our efforts?



1. Mission (or purpose). Why does your group exist? What's the need? In other words, what problem are you trying to solve?
2. Goals. What do you hope to accomplish over the long run? In other words, what do you plan to do about

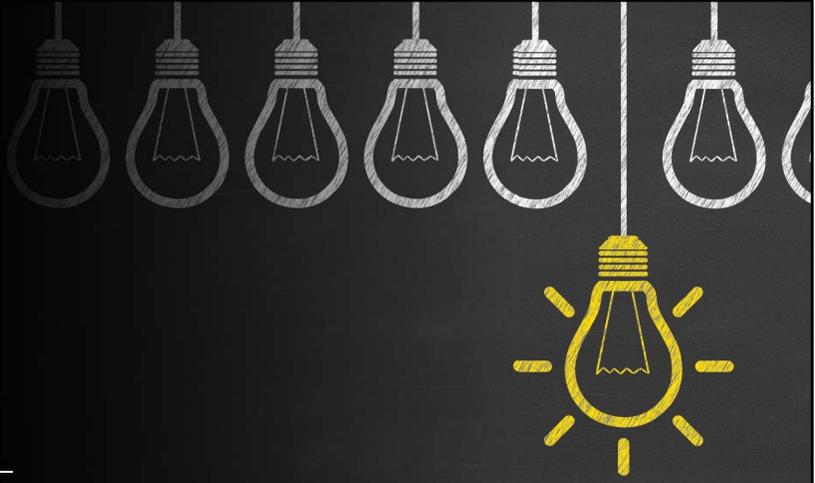
why you exist?

3. What is the need? What is the evidence that this is a pressing need? Why does this matter?
  
4. Objectives. List your objectives specific, measurable, and time-limited that demonstrate how your goals will be met. (The more specific, the better.) How is your approach different than others working in this area?1
  
5. Organizational History. What have you accomplished so far? What is your competence? What are you most



foundation grants, government funding, fee for service, etc. and how much do you expect to raise from each category?

8. Attach financial statements for the previous fiscal year and a budget for the current year.



# Maximizing Your Website for Fundraising

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## XYZ Website Suggested Changes:

### B. Home Page

1. I like the prominent **donate button** on the upper right-hand corner.
2. Scrolling down the page the print is **too small**. It's hard to read especially for older readers. Legacy donors are usually older.
3. Pull out the **vision and values and mission**.
4. XYZ social media – Facebook, Twitter and LinkedIn. All social media icons **need more prominence**, Millennials, GenXs etc. prefer social media. Put a

Donate Button on Facebook.

5. I like to read the Vision and Values of an organization on the home page. I believe that people support and donate to organizations that they have shared values with Please support us language should be more direct. Call to action.
6. I'd change the donate button to **"Ways to Give"**.
7. Let's give the donors the language they need in the estate planning section.

## **B. Impact Page**

1. I'd like to see an Impact Page. What are XYZ's accomplishments?

## **C. Contact Page**

1. List staff with names and email addresses.

## **D. Donate Page**

1. What are donors XYZ choices for giving?
2. I'd like us to be able to accept stock, donated vehicles, etc. See below for Transferring Stock, Legacy Giving, IRA Qualified Charitable Distribution, Vehicle donation, etc.
3. Monthly Giving: needs a rationale for donors, for example, "your monthly gift, enables you to make a

difference with the gift amount that is most convenient for your budget” .... Or -- For as little as \$10 per month you can make an ongoing commitment to XYZ and our programs that .....

4. I'd like to see donation amounts for donors to select an amount to give. Let's highlight the amount we want them to make. This page has 2 highlighted giving amounts.
5. This is an easy way for people to give: Amazon Smile. Especially when they buy books via your website.
6. Donate Stock or a Vehicle: we need a page for vehicle donation and we need a separate page for transferring stock (see below). I would suggest that we contract with a company where they pick up the vehicle, give a receipt to the donor, and we get a portion of the sale of the vehicle. This would involve no efforts on the part of XYZ staff. The donate a vehicle page takes you to a different website. We need to be able to accept this gift on XYZ's website. It's doable. Catholic Charities of the East Bay has an easy way to do this.
7. I'd like to see copy on the donation page that allows donors to make a gift in honor of or in memorial to someone. How about “honor someone by making a gift to ....”.
8. Legacy Giving: needs copy – see below
9. We need a DAF Direct tab

## 10. Charitable IRA Rollover

### A. General

1. Has there ever been a Facebook fundraising? How much money comes in via Facebook? **We need a Donate button on FB page** that takes you directly to the Donate page on XYZ website.
2. Both the education fund and the action network need Mission/Vision/Values statements
3. XYZ organizational values statement is not a values statement, it is a definition.

### For Transferring Stock:

Thank you for your interest in making a charitable gift to XYZ in the form of a Stock Transfer. Donating appreciated securities often allows donors to make a bigger philanthropic impact and to receive greater tax advantages than donating cash or selling the stock and donating the proceeds. By donating appreciated securities, you bypass capital gains tax and may deduct the fair market value of your gift.

To donate stock to XYZ (tax ID# xx-xxxxxxx), please note the following:

- Brokerage House:
- Account Name:
- Account Number:
- DTC Number:

- Code:
- Reference: Donor Name (Including your name will ensure the gift is properly acknowledged.)

## **For Legacy Giving**

Including XYZ in your legacy plans enables us to provide programs ..... and positively impact .... Legacy giving also allows you to plan your estate and charitable giving in ways that benefit your family.

Examples of this type of planned giving include:

- Providing for XYZ through a will or trust
- Through your retirement plans, insurance policies, and bank/investment accounts
- Through charitable gift annuities and charitable remainder trusts

By leaving a legacy to XYZ, you become a member of the ... Legacy Circle, and we honor your gift by listing you or a loved one in our annual report(???). If you choose, you may make your gift anonymously.

Sample bequest language

I hereby give to XYZ, a California nonprofit corporation with its principal offices at xxxx, xxx, xx (the sum of \$\_\_\_\_) or (\_\_\_\_% of the residue of my estate,) to be used for its

general purposes.

*Please consider this page an informational resource to help you in meeting your philanthropic goals. The information provided here is for illustrative purposes only and should not be considered investment, legal, accounting, tax, or other professional advice.*

*RestoringVision recommends that each person considering a legacy gift consult with her or his own legal and/or financial adviser.*

### **For DAF Direct:**

DAF Direct enables donors to recommend grants from their Donor Advised Fund, also known as DAFs directly from XYZ's website. Neither the donor or XYZ will incur any download or transaction fees.

It's easy and simple and a great idea, visit [dafdirect.org](http://dafdirect.org).

### **For Charitable IRA Rollover (see number 10 above):**

If you are age 72 ½ or older and own a Roth or traditional IRA, the Charitable IRA Rollover or "Qualified Charitable Distribution" (QCD) offers advantages for your charitable giving. Tax law still allows you to use your required minimum distribution to support XYZ while bypassing your gross income. It's even better than a charitable deduction

Contact your IRA manager today and request a distribution be made directly to XYZ by December 31, 2021!

## Some 2020 Stats/ Diversifying your Fund Development Plan

### Fundraising Effectiveness Project

[www.afpfep.org](http://www.afpfep.org)

- Donor Retention
- First time donors
- New donors
- Lapsed donor return
- Gift amount
- Why did they leave?
- Why did they stay?

#### AFP fundraising effectiveness project

1. Retention rate is steady at 43.6% increase retention by thanking them quickly, segment communications (tells them that you know who they are), talk impact, solicit feedback, prioritize monthly giving.
2. First time donors only 19.3% make a second gift, so we are losing them here. Why? What is your second gift strategy? Have a 90 day cultivation timeline: with donor welcome kit, thank you call (board members can do this), thank you letter, newsletter, tour of the organization, survey -- orgs that do this have a retention rate 15% higher.
3. 18.5% increase in new donors – you want to keep them see above.
4. 13.7% lapsed donors return – ask lapsed donors why they left? We miss you communications.
5. 10.6% giving is up by this percentage.
6. Why do donors leave – 5% say charity did not need them; 18% poor communication; 36% others need them more; 8% what's the impact? 13% no gift acknowledgement
7. Why do they stay? Organization is effective, knows what to expect from the organization, timely thank you, feels like they are a part of an important cause, they can give feedback, they are appreciated, IMPACT

## Fund Development Planning

- Development is more than just fundraising – it's growth in mission and includes planning, communications, and fundraising
- We've talked about planning, strategic planning answers the questions – who are we? What distinguishes us from our competition? What do we want to accomplish? How will we reach our goals? How do we hold ourselves accountable? Answering these questions provides a script for communications. Effective communications seeks to nurture and deepen relationships with constituencies. Communications plans help cultivate relationships between prospective donors and the organization.
- Annual giving is the start of any effective development plan. Then we proceed to major gifts, planned gifts and capital campaign. The annual fund is the foundation of all fundraising. It serves to bound donors to the organization through recurring gifts.
- A diversified fundraising plan has individuals as the 80% from individuals.

**QUESTIONS?**  
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