

Fundraising without a Fundraising Staff

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Seminar Overview

- Elements of a fundraising plan
- Tools needed to implement a fundraising plan
- Types of fundraising events
- Next steps for your own agency fundraising plan



Elements of a Fundraising Plan

- Financial Goals
- Ways to Get There
 - special events
 - annual appeals
 - board giving
 - corporate giving
 - religious sector giving
 - internet contributions
 - earned revenue
 - endowment
 - planned giving
 - proposals
 - targeted events
 - corporate sponsors
- Time Frame



Tools

- Fundraising Committee of Board
- Fundraising Calendar
- Clear message/case statement/reason for giving
- Match between your message/mission and donor interests
- Automation



Pre-requisites

- 501(c)(3) status
- Charitable registration
- Most recent 990
- United Way donor code



Thanking Donors

- Thank you letters
 - value and date of gift
 - line indicating that no goods were exchanged (Federal tax regulation)
 - personal notes
- Thank you events
- Recognition in newsletters, annual reports, website, etc.



Annual Appeals

- Letter, pledge card, return envelope
- Who will be solicited?
- Use of mailing house, bulk mail
- Donor levels or segments
- Clear message of what the donation will buy/change – client stories
- Personalization of letters and thank you letters
- Rapid and personalized thank you letters



Board Giving

- Prescribed donation policy in by-laws and/or Board manual
- Peer pressure/reports on Board giving
- Board participation in scheduled events
- Board connections to the business community and potential donors
- Board public relation speech to the public



Corporate Giving

- Which corporations do you solicit?
 - corporations with ties to the agency
 - mission/clients (pharmaceutical companies)
 - corporations that employ agency Board members
- How do you solicit corporations?
 - personal letters to contacts or community relations staff
 - ❖ cash donation
 - ❖ event sponsorship/advertising
 - ❖ in-kind contributions



Religious Sector Giving

- Identify religious organizations & contacts
- Solicit organizations
 - cash donations
 - volunteers
 - in-kind donations (facilities)



Proposals

- Private foundations
 - match of foundation interests to agency mission
 - personal relationships between foundation trustees/officers and agency Board/staff
 - clearly written narrative
 - required attachments



Planned Giving

- “Gift planning”, “deferred giving”- any gift that requires financial or estate planning
- Should be addressed once operational fundraising goals are met
- For donors who want to make a lasting impact – your job is to ensure that your agency can sustain such a gift (and will be around for a long time)
- Legal counsel/accountant/planned giving expert needed to assist with the specific details of a planned giving program
- Board involvement



Endowment

- Creates a long-term safety net for your organization
- Interest on the endowment can be used for operating costs; principle remains in investments and is not available for agency use
- An endowment can be created for special uses – such as a capital campaign, facility maintenance, etc.



Endowment Logistics

- Manage it at your agency (need for investment expertise within agency staff/Board)
- Contract with a foundation (e.g. Chester County Community Foundation)
- Set-up a parallel foundation (e.g. The PHMC Foundation)



Internet Contributions

- Does online giving complement your current fundraising plan?
- Are you ready to invest in a system?
- Evaluate your options
 - Free Systems, e.g. Network for Good, just add a link on your website and wait for checks to come in
 - Third-party system, e.g. sporg.com (\$299 set-up fee, \$199 annual fee), provides all forms, merchant account and security necessary to accept donations
 - Robust donor-tracking systems, e.g. e-tapestry.com (free up to 500 donor records, then a sliding scale based on number of records, number of users at your org., tech support purchase plan.)



Internet Contributions cont.

- “If you build it, they will come” philosophy does not always apply to online fundraising
- Once you have it, tell people they can make gifts online
 - in your newsletter
 - on pledge cards and reply envelopes
 - on the your homepage
- Think about using the system to collect payments for trainings or other fees your agency collects



Earned Revenue

- Sale of agency products (bracelets, calendars, t-shirts, etc)
- Operation of agency-related business (thrift shop, catering business)



Types of Special Events

- Cultivation
- Friend-raisers
- Golf tournaments
- Tennis tournaments
- Galas/Dinner Dances
- Raffles
- _____-a-Thon
- Auctions



Special Events

- Role of volunteers
- Tie-in/appropriateness to agency mission
- Expense of event – gross vs. net revenue
in kind contributions
- Who will be invited?
targeted guest list
- Corporate sponsors
- Collaboration with existing events & other agencies



Event Planning Group Exercise



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Next Steps

What tools do you need to get started?

Do you have the pre-requisites?

Is your fundraising goal clear?

Do you have a Committee/volunteers to assist?

Which type of event will work best for you?

When can you conduct an event?



Resources

- www.sporg.com
- www.etapestry.com
- www.blackbaud.com (Raiser's Edge software)
- National Committee on Planned Giving
(www.ncpg.org)
- www.philafound.org (info on planned giving)
- www.networkforgood.org



Resources

- www.guidestar.org
- www.boardsource.org
- www.ephilanthropy.org
- www.donorperfect.com
- www.grantstation.com
- www.lewiscullman.com
- www.zimmerman-lehman.com



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