

**“To give away money is an easy matter and in any man’s power. But to decide to whom to give it and how large and when, and for what purpose and how, is neither in every man power nor an easy matter.”**

**- Aristotle**

# LEARNING OBJECTIVES & AGENDA

How to create a sustainable fundraising plan?

- Building A Case
- Engaging Donors
- The Fundraising Plan

# Building a Case

- Convey the following three points:
  1. Fundraising Need  
“Why do we need the money?”
  2. Impact of Donations  
“What are we going to do with it?”
  3. Story  
“How did it make a difference?”

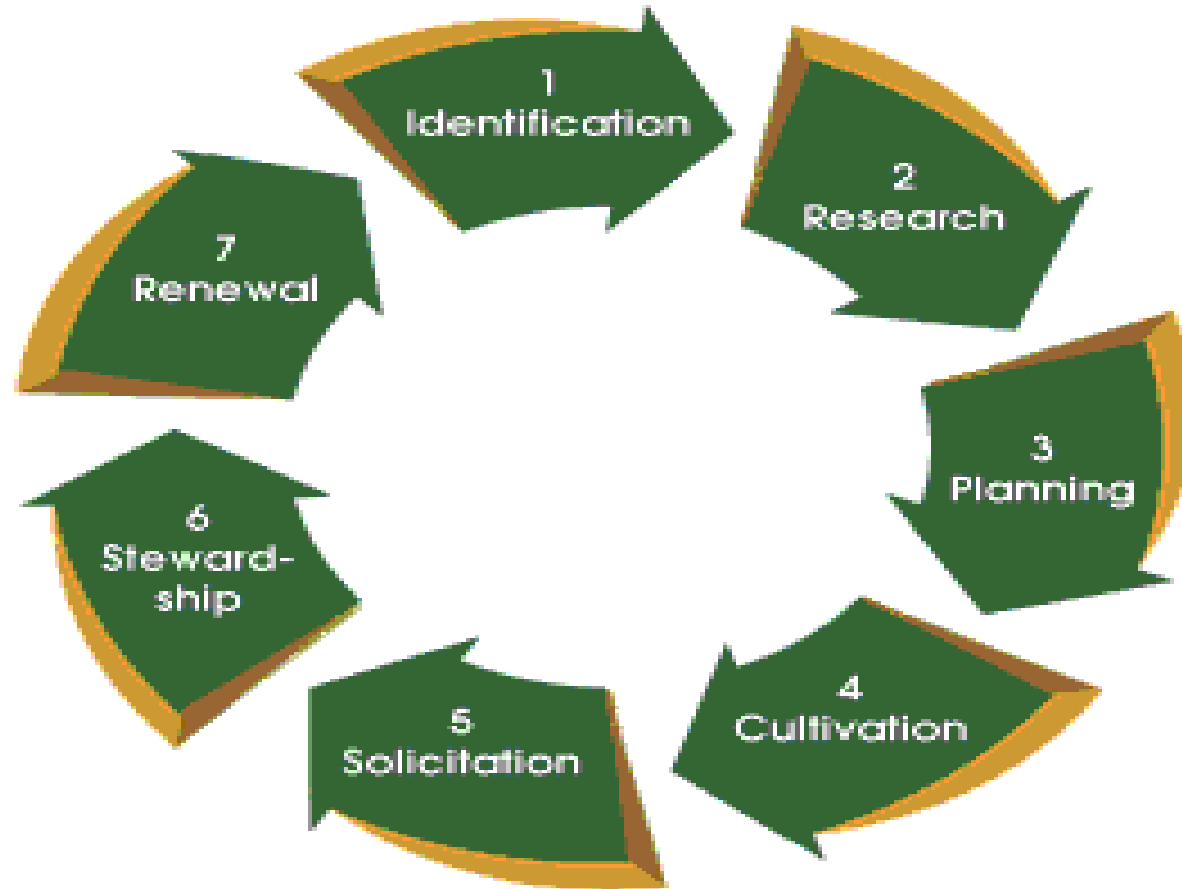
# TELLING OUR STORY

- By telling stories, each fundraiser develops:
  - A sense of ownership in the campaign
  - Increases their feelings of self-confidence
  - Their ability to talk about programs and services

# Practice

- “No one does \_\_\_\_\_ as well as the Y does. We are the people who \_\_\_\_\_”

# Donor Engagement



# 10 Reasons Why People Give

- They have a deep and sincere belief in the organization and its purposes.
- They believe that the current needs of the organization are important, both personally and for the sake of the community.
- They have a sense of loyalty, gratitude, and affection toward the organization. These donors could be current or former clients, staff members, board members, or the families of any of these.
- They have a friendship with and respect for those who solicit them and by donating to the organization, they show support for their friends.
- They want to thank and honor the organization for past services and/or honor staff and volunteers who work/have worked at the organization.
- They want to ensure the organization can continue to fulfill its mission and that services continue for the future good of the community.
- They appreciate the peer involvement they have cultivated through board and volunteer activities.
- They are aware of the tax benefits of charitable giving and want to maximize their tax considerations.
- They want to be recognized as a supported of the organization or have a loved one publicly recognized.
- Because they feel that here and now, supporting this particular organization is the right thing to do.

# CONNECT IMPACT TO PHILANTHROPY

- You have great example of stories of impact in their community, but those stories need to be connected to the charitable gifts that made it possible.
- Example: *“20 teens are able to learn, grow and thrive - each one supported by gifts from YMCA donors – in our after-school care programs.”*
- Make connection about someone making a gift that provides impact in community



# FOUR STEPS OF A SUCCESSFUL ASK

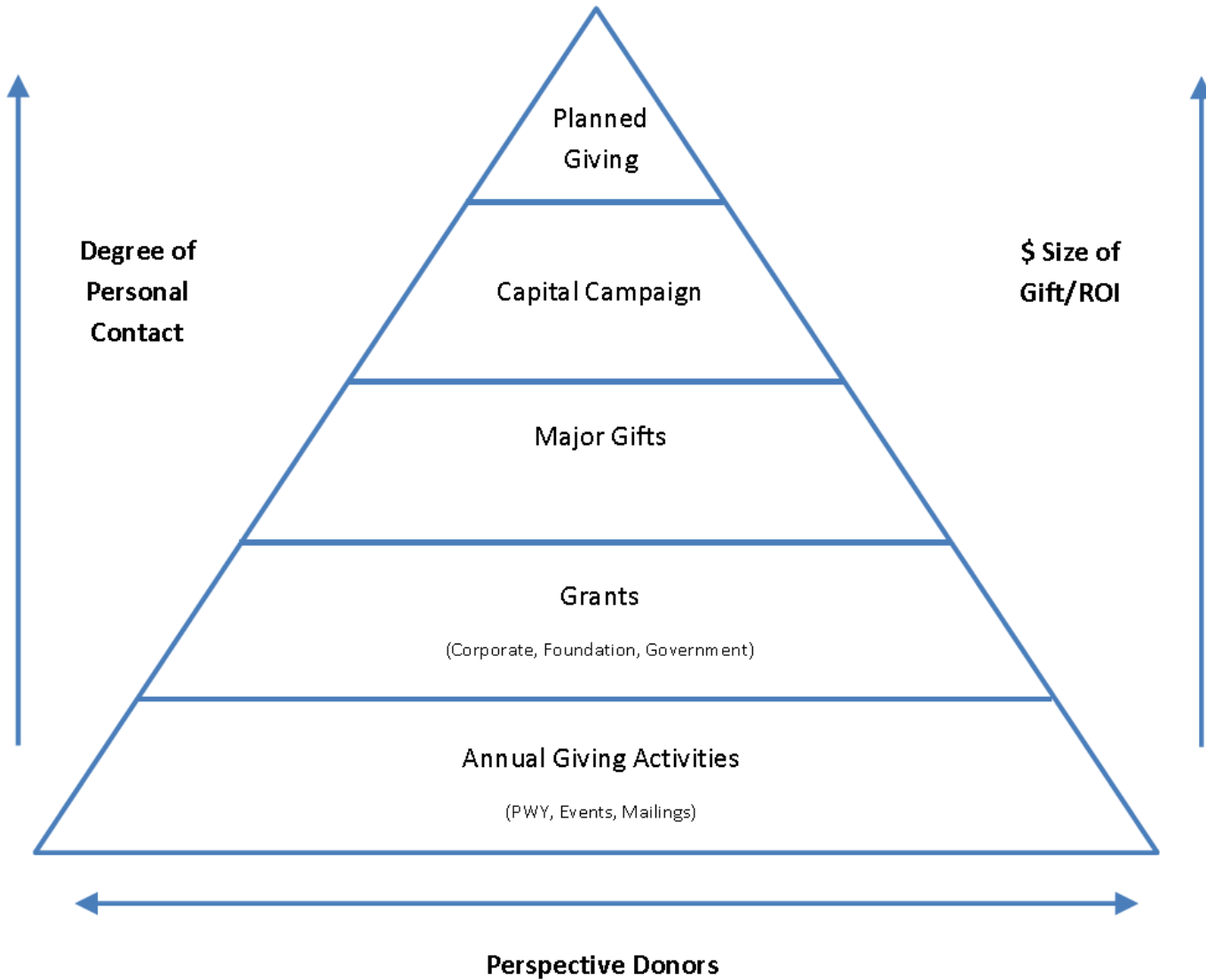
- *Call for Appointment*
- *The Meeting*
- *The Request*
- *Follow-up*

# The Ask

- The right time to ask is when the donor is interested, excited and feels that their questions have been answered.
- Ask for a specific amount. It is important that you close the call with a specific amount.
- Present ways in which the donor can stretch their gift (monthly billing, stock gifts, etc.)
- Be quiet! Let the donor talk. Don't hear no unless they say no.
- When they agree to make a gift, secure their written pledge on the pledge form.

# The Fundraising Plan

- Methods
  - Annual Campaign
  - Events
  - Major Gifts
- Engaging Volunteers
- Set Goals and Benchmarks
- Resources



# Engaging Volunteers

How can we utilize volunteers to engage more people in our mission?

- Volunteer Roles
- Recruitment
- Succession Planning

# ENGAGING VOLUNTEER CAMPAIGNERS

- Tell volunteers what you expect of them and how you will help them succeed
- Show your case for support addresses needs in the community
- Find effective ways to show campaigners how to ask for money
- Ask your volunteers to make a gift of their own

# Next Steps

1. Get Your Board on Board
2. Develop Goals and Timelines
3. Identify and Assign Prospects
4. Initiate the Cultivation Process
5. Track Progress Regularly
6. Make Specific Gift Requests
7. Acknowledge Gifts and Begin Anew

**“I don’t think you ever stop giving. I really don’t. I think it’s an on-going process. And it’s not just about being able to write a check. It’s being able to touch somebody’s life.”**

**- Oprah Winfrey**