


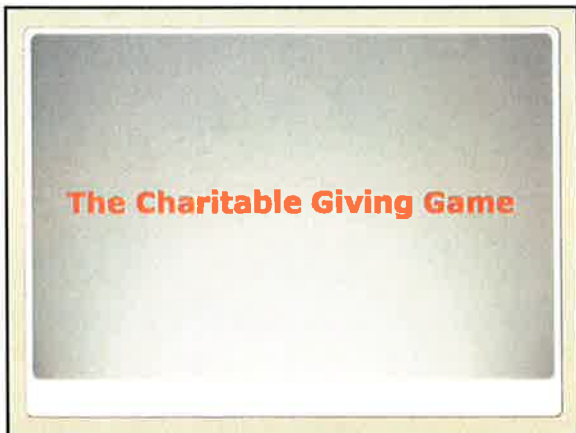
Building Fundraising Muscle
2012 St. Vincent de Paul Annual Meeting

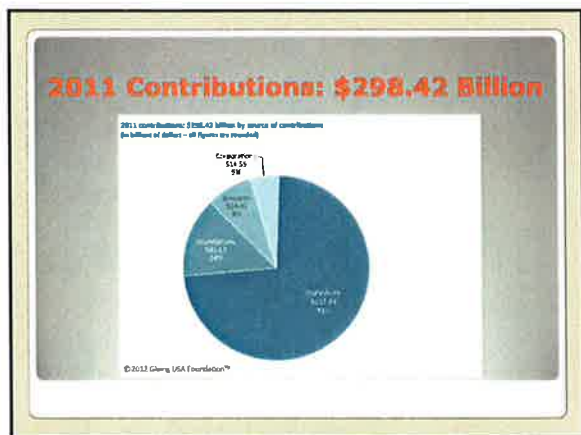
Two of the greats

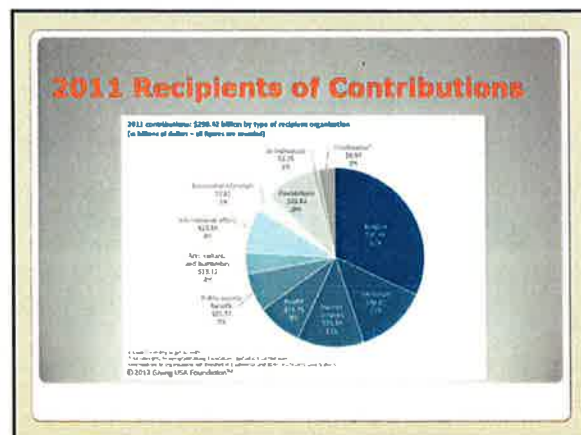


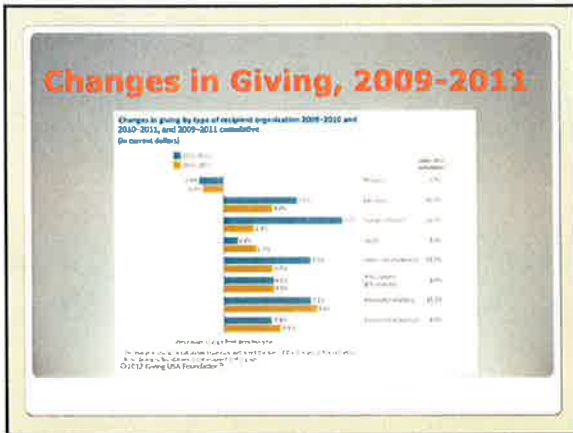
How do they do it?

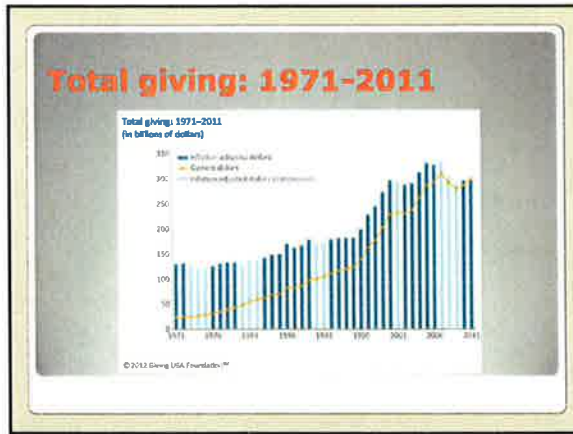
1. Students of the game, smart
2. Understand motivation
3. Have a plan - no short cuts
4. Listen
5. Focus, discipline, execution

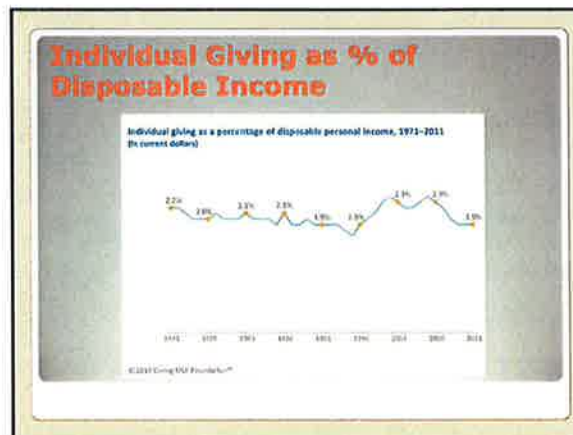


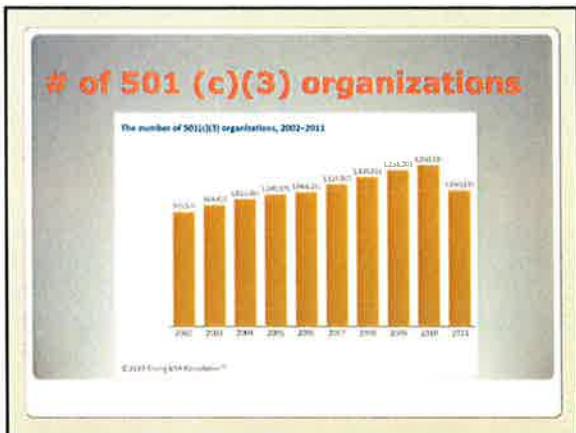












- ### Key Takeaways
1. Be smart – focus on individuals
 2. Approach foundations and corporations through individuals
 3. Recognize that fundraising is competitive

Why Do People Give?

Internal Motivations

Personal or "I" Factors	Social or "We" Factors	Negative or "They" Factors
Acceptance of self, self-esteem	Status	Frustration
Achievement	Affiliation	Unknown situations
Cognitive Interest	Group endeavor	Insecurity
Growth	Interdependence	Fear and anxiety
Guilt reduction or avoidance	Altruism	Complexity
Meaning/purpose of life	Family and progeny	
Personal gain or benefit	Power	
Spirituality		
Immortality		
Survival		

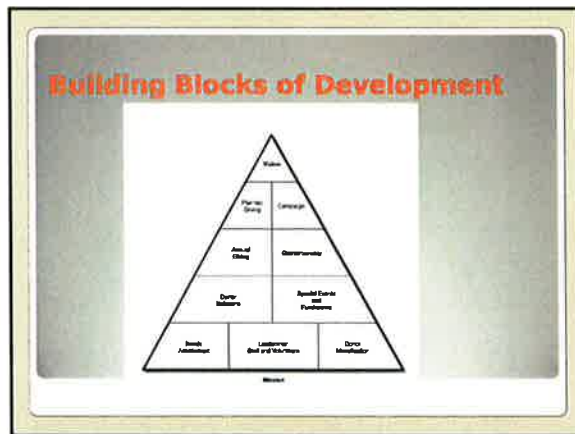
External Influences

Rewards	Stimulations	Situations
Recognition	Human needs	Personal involvement
Personal	Personal request	Planning and decision-making
Social	Vision	Peer pressure
	Private Initiative	Networks
	Efficiency & Effectiveness	Family involvement
	Tax deductions	Culture
		Tradition
		Role identity
		Disposable Income

Source: Fundraising Fundamentals, 2nd Edition, James H. Greenfield

- ### Key Takeaways
4. People give for different reasons
 5. Listen the gift!
 6. Consider testing appeals based upon different motivations





Mission

- Mission – Why you exist. What you do.
- If you didn't already exist, why would you be created today?
- Foundational

Vision

- Vision – What you aspire to do/become. The ultimate goal. Seldom attained.
- Imagine Possibilities
- Believe

Needs Assessment

- Well-reasoned case for support
- Include intended outcomes
- Emotion
- Ongoing/annual and special project

Leadership: Staff & Volunteers

- Coordination
- Job description: Clear roles and responsibilities
- Train, value and acknowledge
- Succession planning
- Episodic
- Word about youth: empower

Donor Identification

- Know who your donors are
- Be able to contact them
- Have the ability to store and retrieve information about them
- Annual reports (schools, colleges, hospitals, arts, United Way, community foundations)
- Observation

Donor Relations

- Inform, educate, connect regarding: mission, vision, case for support and impact
- Involve, engage, ask for perspective
- Thank and recognize
- Do something unexpected

Special Events & Fundraisers

- One well-executed "major" fundraising event
- One "major" donor cultivation event
- One donor acknowledgement event
- One fundraiser 6 months opposite major fundraising event

Annual Giving

- The most important type of fundraising
- Unrestricted
- Personal solicitation, mail, phone
- New+Reactivated offset No+Lapse
- Base annual campaign on increases
- Ask for \$35 from first-time non-donors
- Ask lapsed donors for last gift
- Focus on preventing donors from lapsing
- Leadership annual giving society
- The power of a challenge

Grantsmanship

- Approach decision-makers through friends
- Focus on family foundations
- Done-deal before putting pen to paper
- 1 Hail Mary per year

Planned Giving

- \$41 Trillion by 2055
- What is your policy?
- Best planned giving prospects are your most loyal annual donors
- Beneficiary on existing life insurance
- Purchase of new policy

Campaign

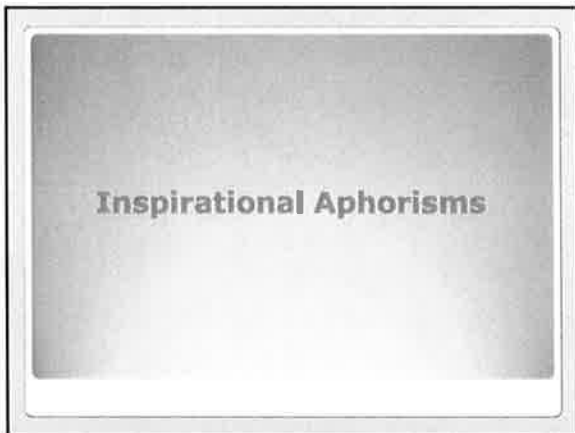
- 5 years of consistent annual fund support
- Existing donors
- Goal cannot be based upon need
- Budget to a **design**, or design to a budget
- Feasibility **first!**

Key Takeaways

7. Focus, discipline, execution – no short cuts
8. Mission, vision and needs assessment – basis of case for support
9. Case should be urgent, relevant and compelling
10. Tell me a story...use emotion
11. Do not nickel and dime donors with fundraisers
12. Unrestricted annual fundraising should be focus

Key Takeaways continued

13. Treat corporations and foundations like people
14. When it comes to planned giving, ask to be named as a beneficiary on life insurance
15. Feasibility first!







Fundraising Resources from the National Council

HOW TO ACCESS

1. www.svdpusa.org
2. SVdPUSA Member Information Site
3. Programs and Tools
4. Development Tool Box
5. Choose from one: Friends of the Poor®Walk, Friends of the Poor®Grant, Development Resources (SVdP Resources or General Resources), Planned Giving Toolbox-a personalized tool box complete with brochures, printable with any logo and/or contact information.

SVdP Resources

- * 1. Grant Writing Seminar and Training Manual
- * 2. Catholic Funding –An on-line resource and foundation search results identifying Catholic funding sources
- * 3. Corporate Giving Program-a complete tool kit on implementing a corporate giving program.
4. Building A Development Team-Resources for hiring a Development Director
5. Region Resources-These are foundation and/or corporate searches completed by area.
6. National Meeting-This folder contains the fundraising templates to assist with the fundraising program for national meetings.
7. Promotional Resources-SVdPUSA table top display and cook book are listed

General Resources

In this section you will find FREE resources to assist you with any of your fundraising needs. These are the key resources to making a fundraising program successful.

Please contact Steven Martinez, National Development Director at (314) 576-3993, x213 with any questions

* BACK: PLANNED Giving TOOL BOX.

* NVDP



National Council of the United States-Society of St. Vincent de Paul

***Customizable e-booklets devoted to specific
Planned Giving Topics are now available online!***

www.pgih03.info/ebooklets/svdp/z_wills_frameset.html

The e-booklets program provides a full compliment of consistent, up-to-date, planned giving marketing brochures, customizable and printable on demand.

- Wills and Bequests
 - Planning Your Will - How to Make It More Personal and Effective
 - Six Steps to an Effective Will
 - Charitable Bequests - How to Get the Most Out of Yours
 - Opportunities for Making Charitable Bequests - What Assets are Best to Give
 - Bequests FAQ
- Retirement and Personal Planning
 - The IRA Charitable Rollover
 - Year-End Planning - Strategies for Giving and Saving Taxes
 - Retirement Plan Assets: Leaving More to Your Family and Charity
 - Increase Your Retirement Income with a Deferred Gift Annuity
 - Personal Financial Affairs - Your Book of Records
 - Smart Personal Planning - Strategies for Today and Tomorrow
 - Savvy Gifting Means Everybody wins - Save Taxes, Generate an Income and Help Us
 - Gift Planning Quick Guide
- Gift Annuities
 - Planning with Gift Annuities: How to Do More For Yourself and Charity
 - The Charitable Gift Annuity - A Gift that Gives Back
 - Exploring Gift Annuities - Understanding the Basics
 - The Charitable Gift Annuity - A Smart Way to Give and Receive
 - FAQ
- Other Gift Plans
 - Making a Difference - Creative Ways to Leave Your Own Legacy
 - Life Income Gift Plans: Ways to Give and Receive
 - Maximizing Tax Savings with Gifts of Appreciated Stock
 - Gifts of Property: Opportunities and Benefits
 - Gifts of Real Estate: Unlocking the Financial Benefits
 - Gifts of Life Insurance - Effective Ways to Make Them
 - Revocable Gifts
- Trusts
 - The Charitable Remainder Trust: A Gift and an Income
 - Trusts in Financial and Gift Planning - Maximizing Your Benefits
 - The Charitable Lead Trust: How to Give and Pass Wealth to Your Heirs
 - Charitable Remainder Trusts FAQ
- Estate Planning
 - Estate Planning - Why It's Still Important
 - Estate Planning Today - A Guide to a More Effective Plan
 - Estate Taxes: Ways to Minimize Their Impact

For More Information: Please contact Steven Martinez, National Development Director at (314) 576-3993