



# The Joy of Fund Raising

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The FUNdamentals

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# The FUNdamentals of FUNd Raising

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- Why do people give?
- Create a Plan - Across the Calendar
- WHO - Individuals, Corporations, Foundations
- Donor Stewardship
- Tools of the Trade
- Professional Organizations
- What we are not covering today - Grants or Special Events

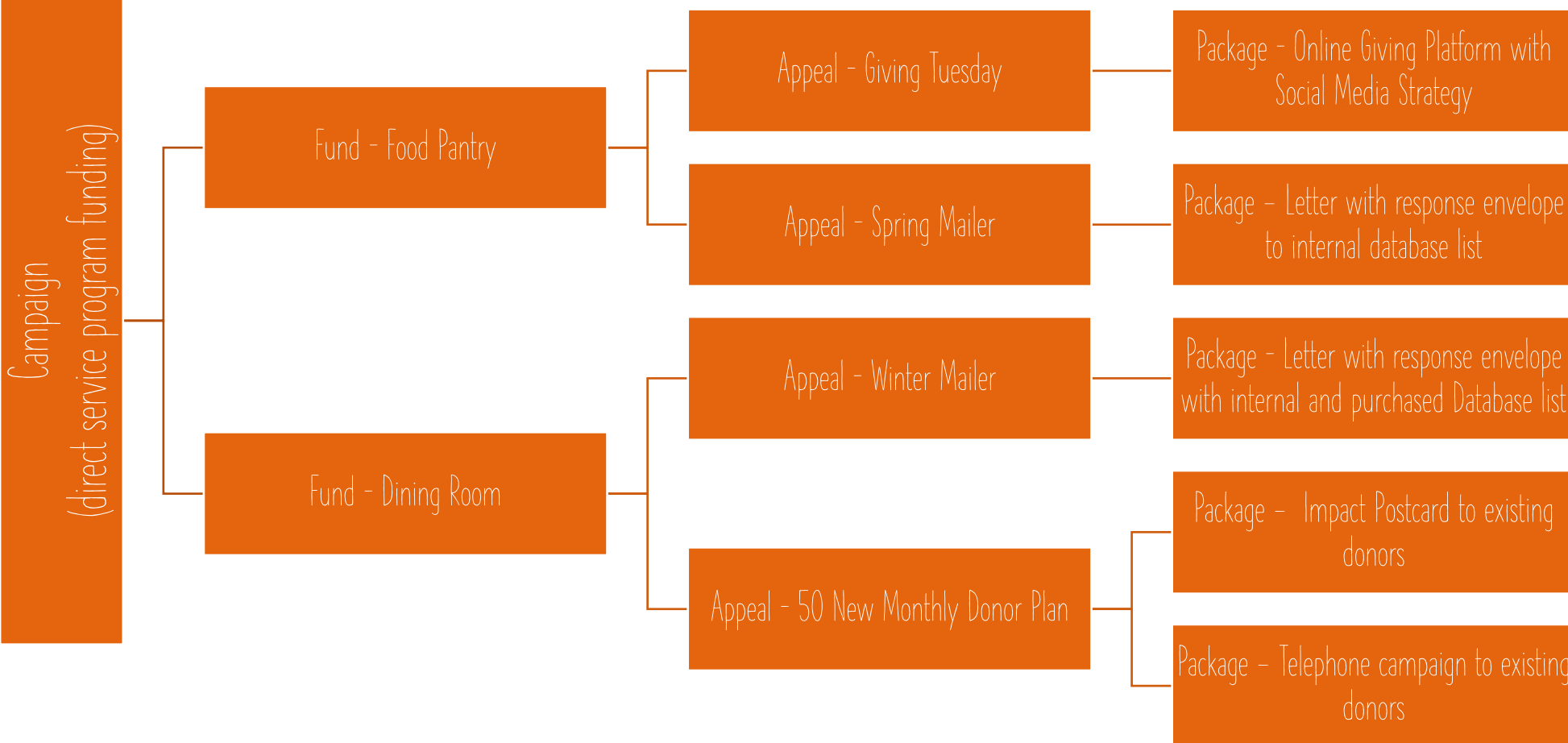
# Why do people give?

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- Nine Reasons People Give
  - #1 - Simply because they were asked.
  - Social Dynamics
  - Altruism
  - Trust
  - Impact
  - Goal Proximity
  - Overcoming Difficulty
  - Egotism
  - FOMO
- What current research is telling us about Millennials, Women Philanthropists and How Couples Give.
- Peer to Peer Fund Raising

# Create a Plan - Across the Calendar

- Campaigns, Funds, Appeals, Package



# Multi Channel Fund Raising











**Build your communication calendar to maximize potential.**

Map channel contact cadence by cluster.

High cluster donors are more likely to respond and have higher long-term value. Maximize value by increasing frequency of contact in all channels.

Lower scored donors should receive a lower-cost channel mix.

	 Mail	 Email	 Phone
 Top 40% High	8	10	1
 Middle 30% Medium	6	10	
 Bottom 30% Low	3	13	

# Who

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- Individuals, Corporations, Private Foundations, Community Foundations/Donor Advised Funds, In-Kind Giving
- Who are your donors and how are you managing this data?
- Prospect Research - from a cup of coffee to an AI-driven research tool - a continuum of options
- Volunteers
- Corporations - Marketing Departments vs. Corporate Social Responsibility
  - Banks, MCOs, Connected Giving Arms, Chamber of Commerce, Service Groups - Networking
- Private Foundations
  - 990's are your best friend - mining for board member connections, submission information, and giving history  
[990 Finder | Research and verify nonprofits | Candid](#) or <https://fconline.foundationcenter.org/>

# Donor Stewardship

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- Personal Touches - cards and regular connection calls (not asks)
- Story Banking
- Impact Reports - Return on Investment
- Tours
- Social Media/Email Touches
- Donor Retention - What is a SYBUNT and a LYBUNT?
- Guidestar, Charity Navigator, BBB Charity - Know your rating and keep updated.
- Tracking information - Donors have the right to view
- AFP Code of Ethics
- Donor Intent - Communication between Development and Finance (If you have to return a gift . . .)

# Tools of the Trade

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- Effective CRM Solutions - Donor Details and Touch Tracking, Donation Tracking and Processing, Multi-Channel Fund Raising, Reporting and Analytics, and Constituent Segmentation.
- CRM Options - Raiser's Edge (Blackbaud), Donor Perfect, Neon One, Arreva, Salesforce, Bloomerang, and Charity Engine
- Prospect Research Systems - Raiser's Edge, iWave
- Corporate Matching Tools - Double the Donation
- Robust Grant Research and Tracking - Amplifund or a similar product
- Your Thriving Nonprofit Facebook Group (the good the bad and the ugly)
- Volgistics (<https://www.volgistics.com/>) and Constant Contact (<https://www.constantcontact.com/>)

*All resources are provided as examples and do not imply any type of endorsement*



# Professional Organizations & Support

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- Association of Fund Raising Professionals – <https://www.afpglobal.org/>
- CFRE International (Certified Fund Raising Executive) – <https://www.cfre.org/>
- Planned Giving Roundtables
- Certificate Programs and Undergraduate and Graduate Degree Programs
- Online Resources – Lilly Family School of Philanthropy <https://philanthropy.iupui.edu/research/index.html>  
Candid.org – <https://learning.candid.org/training-search/>
- Blackbaud University – <https://www.blackbaud.com/training-support/training/blackbaud-university>
- Grant Professionals Association, American Grant Writer's Association (Certified Grant Writer Designation)
- Network for Good, Nonprofit Leadership Lab
- Fund Raising Strategy Related Social Media Groups – Facebook, Linked In

# Questions?

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What was your biggest take away from today?