Expanding Your Circle of Friends

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Agenda
October 27, 2012 - 9:00am - 12noon

- Introductions & Overview
- Preparation & Planning
- BREAK (15 minutes, approximately 9:30-9:45am)
- Elements of Strategy
- Case for Support
- BREAK (15 minutes, approximately 10:05-10:20am)
- Approach (make friends, not asking funds)
- The Ask & Donor Relations
- Sharing Success (Media & Advertising)
- Q & A session
- Adjourn

Who should fund raise?
Who is fundraising but why do people give?

Where do we find the money?

How do we “ask” for money?

Who needs to know we are fundraising?

Why do we need to share our stories?
Fund Raising is...
"The right person asking the right prospect for the right gift for the right reasons at the right time in the right way."
Individuals
Top 10 Givers in 2011

1. Margaret A. Cargill - $16,000,000,000 - Her inheritance

2. William S. Dietrich II - $10,000,000,000 - Chairman of Dietrich Industries

3. Paul G. Allen - $5,000,000,000 (8 years) - Founder of Microsoft

4. George Soros - $3,500,000,000 (8 years) - Chairman of Soros Fund Management

5. Michael R. Bloomberg - $1,311,200,000 (8 years) - Mayor of New York City and Founder of Bloomberg L.P.

6. Raymond G. and Ruth C. Perelman - $227,300,000 - Chairman of RPC Industries

7. David and Irene Sarnoff - $200,000,000 - Mr. Sarnoff is Chairman of the Sarnoff Corporation

8. Robert C. and Dorothy J. King - $165,500,000 - Mr. King founded the investment firm

9. Arthur G. and Margaret B. Glasgow - $125,000,000 - Mr. Glasgow was a co-founder in 1982

10. John and Julie Mark - $110,000,000 - Mr. Mark is chief executive of Energy Corporation of America

What Appeals to Donors?

- Why?
  - Infrastructure
  - Development

- People
  - Academic
  - Programs
  - Scholarships

- Community
  - Operations
  - Endowments

- Capital
  - (brick & mortar & equipment)

Preparation & Planning
Thinking It Through - Strategy

- Surveys, Studies, Feasibility Reports
- Organizational Structure
- Review and update job descriptions
  (anyone associated with fundraising)
- Discuss Board and Administration Roles
- Create webpage on homepage
  (website)
- Gather information/data for written
  Resource Development Plan
BREAK one - 15 minutes

Questions?

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Elements of Your Strategy

Assessment
Create a Development Office (office reports to president)
Develop a Resource Development Plan
Develop Fundraising Activities and Events (PR)
Fundraising Methods (mail, in-person, social media, internet, etc...)
Develop Budget (forecast depends on Appeal)
Prospecting

Elements of Your Strategy

Assessment (Strengths & Weaknesses)
  Feasibility Study
  Case for Support
  Project Goals
  Identify barriers
  Financials/Costs
Elements of Your Strategy

Establishing a Money Team

Everyone knows somebody!
Building relationships w/money people!
Choosing the right people! (name dropping)
Making your list public!

Organizing a Development Office

Support tools and activities
Determining Scope and Function
Determine skill sets needed
Hiring a Director or Manager
Working with the President’s Office

Planning Activities and Events

Be prepared for opportunities to showcase
Determine range/scope of activities (realistic)
Signature event, held annually (consistent)
Showcase your organization at all times
4-Legged Stool of Fundraising

**Elements of Your Strategy**

**Types or Methods of Fund Raising**
- Direct Mail
- 1-on-1 with Donor (in-person)
- Internet
- Social Media
- Networking (who knows who)
- Planned Public Events (fund raising)
- Telephone (phone-a-thon and donor relations)

**Budget**
- Spending money to make money
- Planning in advance, what to spend
- Leverage monies from federal agencies
Elements of Your Strategy

Prospecting (data mining)

Gathering Names from Constituency
- Business Colleagues
- Employees
- Community Leaders

Looking outside current Circle of Friends
- Media and News Articles
- Business Gatherings
- Conferences (keynote speaking engagements)
- Other people who fundraise
- Purchase names from Direct Mail Companies

Constituency Model

Building a Case for Support

Institutional Readiness

An organization's case for support is related to their cause and charitable causes come into being because problems and needs exist in society.
Building a Case for Support

Two major elements:

**Case Resources** - used to compile an internal document, sometimes referred to as the case statement.

**Case Expressions** - used to distill information from the case resources for the specific purpose of obtaining understanding outside the organization.

### Case Resources
- Mission Statement
- Goals
- Objectives
- Programs & Services
- Governance
- Staffing
- Facilities
- Finances
- Development & Planning
- Organizational History

### Case Expressions
- Brochures
- Foundation Proposals
- Appeal Letters
- Capital Campaign prospectus
- Press Releases
- Newsletter
- Public Speaking Engagements
- Face-to-Face Conversations

Marketing to Prospects

- A market is a distinct group of people and/or organizations that have resources which they want to exchange for products or benefits.

- In philanthropic fund raising, the exchange is based on values and societal needs, as articulated in the mission statement.
Organizations that take a marketing view of fund raising should consider the exchange potential when preparing the internal case statement and external case expressions.

1. Exchange can be interpreted as "What values does the donor fulfill by giving?"
2. Exchange benefits will have to be considered from the perspective of various giving markets: corporations, foundations, individuals, associations, etc.

Marketing to Prospects

The marketing process requires thought and research to determine the following:

1. Who are the potential donors?
2. What will they require in the form of exchange?
3. What are their interests, concerns, prejudices, conditioning, giving patterns?
4. Who makes the decision about giving and what will affect these decisions?
5. Who are the opinion-makers and what opinions do they hold about this organization?
6. What will stir them to make a gift? What are the motivating forces? What are the exchange potentials and how can we emphasize them?

Exercise:
Writing a Case using SBC Info
Group Discussion & Activity
BREAK two - 15 minutes

Questions?

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Best Approaches and Recommended Methods

- Planned Gift Donor
  Personal Contact

- Capital Donor
  Personal Contact / Letter

- Major Gifts Project
  Personal Contact / Letter / Phone Call

- Annual Fund/Upgraded
  Personal contact / Letter / Phone Call

The Ask

- First Time Donor
  Direct Mail / Telemarketing
  Planned Event / Media
  Personal Contact

[ All bets are off ]
Let them ask you questions (listen)
Ask about their interests
Get their contact info
Talk about your strengths
Invite them to visit your organization
The "Ask"

- Do your research on prospect (where possible)
- Be prepared for the answer "NO"...don't be offended
- Be CONFIDENT when asking
- "Ask" for specific amount
- Be prepared to provide alternative options that match donor wishes and interests

Donor Relations

Follow-up!

- Respond to all donor requests and inquiries
- Acknowledge any/all gifts immediately
- Keep written (and/or electronic) notes on donors
- Stay current on donor files
- Keep donors informed (watch for valid reasons)
- Keep their confidence
- Invite them to all events

The "Ask"

Exercise: Donor Research and Practice the "Ask"

Group Discussion & Activity
BREAK three - 5 minutes

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Sharing Success
Preparing for the Media

Develop lines of communication among employees and administration

Writer of news stories must have complete access to President (keep professional photo on file)

Gather and compile pertinent information, including organizational profile, case for support, mission statement and student info

Establish relationships with media contacts (email & phone & in person)

Create and manage media contact list (local, state, regional and national)

Take photographs (high res) of ALL events, programs and facilities

President must be prepped for all public events and media inquiries

Sharing Success
Understanding the Media

- News Briefs (short)
  - Stories with basic facts and no comments from source
  - Most news briefs are not accompanied by photo
  - Most news briefs get buried in designated sections

- News Releases (full)
  - Full stories that include comments from source
  - Full news releases need/require a photo
  - Placement in publication and print date is important

- Broadcast News
  - Radio news - short, articulate (scripted) when interviewed
  - TV news - sound bytes only and visual image important
Sharing Success
Advertising Tips

- Print Advertising
  - Use photos of students and buildings
  - Keep ad clean and precise (graphics instead of text)
  - Store all advertisements (electronically) for additional use with other media outlets

- Radio Advertising
  - Purchase airtime for weekly news program
  - Written scripts work best for advertisements

- TV Advertising
  - Testimonials make the strongest ads
  - Capture attention with unique facts and stories

Sharing Success - Media

Exercise: Writing a News Brief
Group Discussion & Activity

Highlights
Expanding Your Circle of Friends

- Private donors give to PEOPLE not projects or organizations
- Building relationships take TIME and a CONSISTENT EFFORT
- Seek new donors AT ALL TIMES
- "ASK" after listening... don't assume they will give
- Be PREPARED and FOLLOW UP
- Consistently share your success

Q & A - Closing Session
Adjourn Pilamaya Yelo!

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