



# The 6 Keys to Fundraising Success



# Nonprofit Fundraising 101

A PRACTICAL GUIDE WITH  
EASY TO IMPLEMENT IDEAS & TIPS FROM INDUSTRY EXPERTS



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WILEY

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no organization or  
fundraiser can be  
GREAT at 20  
different things



# The 6 Keys to Fundraising Success



Who is this guy?

And why does he think  
he knows what he's  
talking about?

# career fundraiser



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mighty, nonprofit organizations*







*Well here I am baby,  
practice what you  
preach.*

# AGENDA

1) The Problem

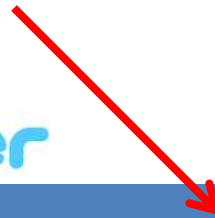
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# SLIDES + RESOURCES

[productivefundraising.com/resources](https://productivefundraising.com/resources)



@fundraiserchad



# The Problem



part 1 = too many  
options

no organization or  
fundraiser can be  
GREAT at 20  
different things

part 2 = lean  
staffing







# JOB DESCRIPTIONS

#9 Other duties  
as assigned.

part 3 = lack of  
focus

the fundraising plan

*OVERVIEW OF THE FUNDRAISING PLAN*

***Background***

The Good Land Trust is a land trust working in Ecotopia actively protecting natural resources and the open landscapes that define the region. The group was formed in 1993 as the Jeffersonia Regional Land Trust, changing its name in 2000 to the Good Land Trust to better reflect the intentions of the organization.

The group has been growing its capacity to do land conservation over the last 10 years, initially hiring a part-time administrator, growing that position to executive director and then in 2002, hiring a conservation staff person to do outreach, education, stewardship and conservation. The group relies heavily on volunteers to complete its work. Through its first 10 years of activity, the group has protected 10 properties encompassing 1,016 acres in the region.

In 2004, the GLT engaged in a strategic planning process to better define the direction and plans of the organization over the next three years. As a part of that process, the group developed this fundraising plan to put funding reality behind the desired direction and accomplishments of the strategic plan. This is the first version of a strategic plan and fundraising plan ever developed by the Trust.

The Trust was given a bequest in 2003 that has the potential to bring significant resources into the organization. This gift affords the Trust with opportunity to significantly increase its capacity and accelerate the pace of conservation at a time when sprawl and development accelerate their impacts on the region. This plan provides a partial blueprint on how the organization can move to the next level and more effectively protect the most important landscapes of the region.

***Strategic Direction for the Good Land Trust***

The Good Land Trust works in partnership with landowners and their communities to preserve the beauty and open landscapes that sustain us. GLT programs follow three primary goal areas of the strategic plan:

1. The most important lands in our region are conserved in perpetuity.
2. The community understands and values conservation of private land.
3. The Land Trust has the capacity to meet the most pressing conservation needs in the community.

From these goal areas, more specific strategies have been developed. For the purposes of the fundraising plan, the functional areas of the plan have been narrowed to five different programmatic areas, plus an additional reserve fund area:

- **Operating Conservation** – this includes all efforts to negotiate and acquire land and easements. This does not include the actual land costs.
- **Stewardship** – this includes the ongoing costs of managing/monitoring the land and easements that we have protected, including the preparation of the initial baseline studies. These expenses, exclusive of the baseline studies, need to be covered in perpetuity. This program area includes the costs of renovating and managing the Noxen Depot.

- **Public Education/Outreach** – this includes the costs of building awareness about conservation of natural resources and the benefits it offers to the community.
- **Fundraising** – this includes the direct costs of raising money to support the needs of the organization.
- **Administration** – this includes the direct costs of administratively supporting all programs within the Trust.

### SOURCES AND USES OF FUNDS

#### *Three-Year Budget*

The funding requirements for the Trust are found in the expense side of the organization's three-year budget. This budget reflects the program priorities established in the planning process. Budget figures for the first year have been defined in great detail and accurately reflect the true costs of implementing the program activities within each function. Future years' budgets estimate expenses using across-the-board increases rather than specific program functional budgets. The overall goal for fundraising is to raise sufficient money to cover the expense in each functional area of the budget over a five-year period.

	2005-2006		2006-2007		2007-2008		2008-2009	
	Amount	Percent	Amount	Percent	Amount	Percent	Amount	Percent
<i>Revenues</i>								
Membership	79,030	49%	97,190	38%	103,100	23%	126,396	33%
Major Donors	11,000	7%	30,500	12%	56,540	13%	45,233	12%
Grants	56,400	35%	64,250	25%	118,655	27%	88,517	23%
Fees and Income	10,600	7%	14,100	6%	23,000	5%	23,000	5%
Reserve draw down	4,200	2%	46,825	19%	138,732	32%	103,480	27%
<b>Total Revenues</b>	<b>161,230</b>	<b>100%</b>	<b>252,865</b>	<b>100%</b>	<b>440,027</b>	<b>100%</b>	<b>386,626</b>	<b>100%</b>
<i>Expenses</i>								
Operating								
Acquisition	40,054	25%	49,795	20%	81,101	18%	64,529	17%
Stewardship	44,798	28%	56,055	22%	124,530	28%	83,101	22%
Public Outreach	17,639	11%	39,488	16%	59,339	14%	59,339	15%
Fundraising	29,154	18%	50,465	20%	103,636	24%	105,636	27%
Administration	29,585	18%	57,062	22%	71,421	16%	74,021	19%
<b>Total Expenses</b>	<b>161,230</b>	<b>100%</b>	<b>252,865</b>	<b>100%</b>	<b>440,027</b>	<b>100%</b>	<b>386,626</b>	<b>100%</b>

The expense areas listed above will be covered by a variety of revenue sources. A few of the expense areas will get all of the funding from a single revenue source, but most will combine several streams of revenue to cover the expenses of that program. Appropriate revenues for each program depend on such issues as donor restriction, donor appeal, foundation priorities, fundraising strengths and weaknesses, etc. The table below takes the functional expense areas in the previous chart and assigns revenue to them.

	2005-2006		2006-2007		2007-2008		2008-2009	
	Amount	Percent	Amount	Percent	Amount	Percent	Amount	Percent
<i>Operating Acquisition (Non-Capital)</i>								
Membership	10,179	25%	10,514	21%	11,252	14%	21,412	26%
Major Donors	1,575	4%	2,675	5%	0	0%	14,125	17%
Grants	19,550	49%	19,925	40%	3,119	4%	3,050	3%
Fees and Income	8,750	22%	10,500	21%	12,250	15%	12,250	15%
Reserve Draw-down	0	0%	6,181	13%	54,480	67%	32,264	39%
<b>Total Acquisition</b>	<b>40,054</b>	<b>100%</b>	<b>49,795</b>	<b>100%</b>	<b>81,101</b>	<b>100%</b>	<b>83,101</b>	<b>100%</b>
<i>Stewardship</i>								
Membership	4,703	10%	4,388	8%	25,638	21%	25,637	40%
Major Donors	7,425	17%	21,325	38%	47,600	38%	17,600	27%
Grants	28,670	64%	26,845	48%	44,568	36%	14,568	22%
Fees and Income	0	0%	0	0%	3,000	2%	3,000	5%
Reserve Draw-down	4,000	9%	3,497	6%	3,724	3%	3,724	6%
<b>Total Stewardship</b>	<b>44,798</b>	<b>100%</b>	<b>56,055</b>	<b>100%</b>	<b>124,530</b>	<b>100%</b>	<b>64,529</b>	<b>100%</b>
<i>Public Outreach</i>								
Membership	10,104	57%	12,964	33%	16,169	27%	16,169	27%
Major Donors	500	3%	2,000	5%	1,730	3%	1,730	3%
Grants	6,285	36%	13,585	34%	26,574	45%	26,574	45%
Fees and Income	750	4%	1,950	5%	2,750	5%	2,750	5%
Reserve Draw-down	0	0%	8,989	23%	12,116	20%	12,116	20%
<b>Total Outreach</b>	<b>17,639</b>	<b>100%</b>	<b>39,488</b>	<b>100%</b>	<b>59,339</b>	<b>100%</b>	<b>59,339</b>	<b>100%</b>
<i>Fundraising</i>								
Membership	24,659	85%	24,854	49%	10,015	10%	12,015	11%
Major Donors	1,500	5%	4,500	9%	6,250	6%	10,818	10%
Grants	1,895	6%	3,895	8%	38,485	37%	38,485	37%
Fees and Income	1,100	4%	1,650	3%	5,000	5%	5,000	5%
Reserve Draw-down	0	0%	15,566	31%	43,886	42%	39,318	37%
<b>Total Fundraising</b>	<b>29,154</b>	<b>100%</b>	<b>50,465</b>	<b>100%</b>	<b>103,636</b>	<b>100%</b>	<b>105,636</b>	<b>100%</b>
<i>Administration</i>								
Membership	29,385	99%	44,470	78%	40,026	56%	51,163	69%
Major Donors	0	0%	0	0%	960	1%	960	1%
Grants	0	0%	0	0%	5,909	8%	5,840	8%
Fees and Income	0	0%	0	0%	0	0%	0	0%
Reserve Draw-down	200	1%	12,592	22%	24,526	35%	16,058	22%
<b>Total Admin</b>	<b>29,585</b>	<b>100%</b>	<b>57,062</b>	<b>100%</b>	<b>71,421</b>	<b>100%</b>	<b>74,021</b>	<b>100%</b>

### *Description of Fundraising Sources*

The Good Land Trust will be developing a range of funding sources to support the work of the organization. These sources in the past have relied primarily on giving from individuals and grants. As the group evolves, it plans to add other sources of revenue to support its work. The following activities are included in the current fundraising program.

#### **1. Membership (annual giving)**

Individuals contribute to the Good Land Trust through annual support to the organization. For the purposes of fundraising planning and communication, annual support has two categories: regular membership (contributions of less than \$500) and major donor membership (contributions of \$500 or more). (The major donor membership category is included as one of the fundraising sources below.)

Annual giving captures all contributions made to the organization that aren't based on an event, purchase or other exchange. It is simply a charitable "investment" in the work of the Trust from someone committed to the same goals and values as the organization. All contributions made in this way become the total annual contribution of the "member." The organization will accept any size contribution as sufficient for membership to the organization. However, all requests for support start with a minimum level of \$50. Different levels of support will be managed with different strategies for cultivation, solicitation and cultivation.

For the Trust, membership is a conceptual category of financial support, not a legal definition of rights based on payment of dues. The terms donors or contributors may easily be substituted. However, the Trust is legally a membership organization that uses the term membership in its Bylaws to define its governing Board of Directors. These individuals, as such, "have all rights and powers conferred on members of nonprofit corporations under the laws of Pennsylvania and such other rights and powers as are specified in the Articles or the Bylaws."

Membership contributions of less than \$500 will generally come through three primary sources.

- *Acquisition efforts* will seek initial contributions from individuals. Efforts to acquire new members will come primarily through direct mail.
- *Special appeals* will seek additional support from current members. These efforts will focus on encouraging additional investment in the good work of the Trust through additional contributions to support specific, highly attractive projects and year-end appeals.
- *Renewals* will seek continuation of support from existing members, encouraging them to renew their annual contribution.

**2. Major Donors (annual giving)**

Major donors are a category of membership designed to encourage larger contributions to the organization. Any individual giving a cumulative total of \$500 or more will be considered a major donor. A more personalized process of cultivation, solicitation and recognition will be provided to major donors with the goal of building a stronger relationship between this high-level member and the Trust. A cadre of fundraising volunteers will be primarily responsible for building this relationship to the organization, and helping the donors feel that their contribution has been a worthwhile investment of their charitable giving. Staff will provide significant support to the volunteer fundraisers, and will participate directly in fundraising cultivation and solicitation as well.

The organization will also develop a planned giving program to encourage members and donors to consider GLT as a beneficiary of a bequest from their estate. The strong emphasis on relationship building is intended to help members and donors feel connected to the organization and committed to its long-term success. Revenues from bequests generally are unknown and difficult to plan as part of annual budgeting. Therefore, the funds from bequests will be dedicated to the organization's endowment or for special consideration as an investment in capacity-building efforts or unless otherwise stated by donor.

**3. Grants**

The Trust will seek support from Foundations to support specific capacity-building efforts and special short-term projects. A particular focus will be made to identify family foundations and donor-advised funds at community foundations as sources of grant funding. Key family members and board members of these foundations will be cultivated much like major donors. In addition, state grants for land acquisition and transactions costs will be sought, as well as funding from Pennsylvania Land Trust Association and other groups focused on capacity building.

Activities defined and approved within the organization's strategic plan will be the focus of grant support. The group may seek grants for general support but not for projects outside of the scope of the strategic and annual plans.

**4. Fees and Income**

The Trust will host a variety of events and activities that have the potential to generate fee income. These events will be designed to provide educational and outreach benefits primarily, and when possible, will include a fee to help recover costs of delivering the activity.

In addition, the group will explore opportunities to host a major event whose purpose will primarily be to raise money. There are examples of groups in the region who have been very successful in hosting and supporting these kinds of special events. The Trust currently does not have the volunteer or staff capacity to implement such an event. The expectation is to identify a niche activity that fits within the donors perceptual understanding of what the Trust does, and build from that an opportunity to raise larger money. As the event grows successfully, it will put more emphasis on fundraising instead of education, although an educational component will always be part of the project.

In addition to these events, the Trust will host other events intended as “fundraising” contacts to support the annual giving programs of membership and major donors.

**5. Interest Income**

The Trust currently has a small endowment invested for the purpose of operational support of the Trust. The current endowment is relatively small, and the investment return from the fund is reinvested as part of the principle. Therefore, no investment income is projected in the early part of this plan. However, potential growth of the principle in 2005 suggests some income may be available in 2006. However, until this potential growth of the principle is better known and able to be calculated, the investment return from the additions to this fund will be reinvested as part of the principle.

**6. Reserve Draw Down**

In 2003, a bequest named the Trust as the beneficiary of a significant portion of an estate valued at \$3.5 million. Several issues need to be settled before the Trust is able to access these funds, but the expectation is that this money could be available to support the work of the Trust as early as 2005. This plan anticipates receiving these funds sometime in 2005, with the full amount available to the group late in that year. A portion of the funds will be invested with the endowment for long-term operations. However, a portion of the funds will be put into a reserve and invested immediately in capacity building. A draw on those reserves is included in the budget above, but is not technically a long-term source of funding.

**FUNDRAISING DIRECTION**

***Fundraising Outcomes***

The Good Land Trust has defined several outcomes that will be accomplished through the implementation of this plan. These outcomes support the strategic plan goal of creating an efficient and effective organization capable of assisting landowners in the protection and stewardship of land.

- 1. Increase the total revenue of the organization.** Every group can do more with more funding. The Trust in particular is small and growing, and additional funds will do much to ensure a more vital, more proactive conservation effort to protect the most important lands in the region. Growing the total capacity of the organization includes increasing opportunities for volunteer involvement, partnership and other collaboration strategies. However, the bottom line reality is that more money will make it possible for the group to engage more people in our effort.
- 2. Increased percentage of unrestricted revenue.** Unrestricted revenue is essential for program flexibility and to respond to emerging opportunities and threats. For the Trust, the largest source of unrestricted money will come from annual contributions from individuals and major donors. Other entrepreneurial opportunities that generate fees will also be explored to support development of unrestricted revenue.

3. **Diverse revenue sources that minimize reliance on any single source of revenue, especially for non-capital expenses.** Currently, funding for the Trust comes from very few sources. Over time this reliance on a few sources will be a significant challenge. In the next five years, it will be critical for the Trust to reduce the percentage of funding coming from foundations to support base operations, and to direct grant funding in the future to specific project initiations and short-term projects.
4. **Stability of funding from all sources.** The work of the Trust is long-term. Stability is vital to ensure the organization can plan and execute its programs over time. In addition, retaining the commitment of current supporters is significantly more effective and efficient than having to build new relationships over and over.
5. **A growing membership in the Trust.** The Trust is working hard to increase the membership of the Trust, and seeks a base membership of more than 1,000 members during the timeframe of this plan. For the purposes of this outcome, major donors will be considered as members.

#### *Strategies for Growth*

The Trust has adopted specific strategies to achieve the outcomes of this plan. These strategies provide an overall approach to Trust fundraising activities. They attempt to bring our most creative and innovative thinking into the effort to raise money.

1. **Invest heavily in capacity-building steps that improve our ability to raise money.** The needs and expectations for fundraising in the future exceed the Trust's ability to raise money today. The Trust must increase its capacity for fundraising by investing in the development of its personnel (staff, board members and other volunteers), systems and structure.
2. **Develop the capabilities of the Board of Directors to lead major donor fundraising efforts.** The growth of the Trust over the next three years will depend on having the people involved who can help lead the organization to the next level. This includes people with a variety of skills, connections and demographics. Perhaps the greatest of these in the short-term is the Major Donor and Planned Committee, a small group of board and non-board members capable and committed to raise money to support the Trust through personal solicitation of support from other major donors. This group would form the core of the fundraising efforts. The success of this group will almost certainly define the success of the entire organization over time.  
The Trust will grow its capacity for fundraising by both training existing board members to be more engaged and effective in their fundraising roles, and by recruiting additional board members and other volunteers who will commit their efforts into building relationships and asking for money. Both training and recruiting will be important strategies for creating the cadre of fundraising volunteers to reach the potential this group has for raising money.

3. **Hire dedicated professional staff to support the organization's fundraising efforts.** The organization needs to complement current staff functions with a fulltime professional to support fundraising. Building the staff infrastructure to support an executive director with significant fundraising capabilities, a development director, a land conservation director, and an administrator will support the level of fundraising anticipated in this plan, as well as the other program activities defined in the strategic plan.
4. **Emphasize long-term relationships in all efforts to raise funds.** Fundraising success for the Trust will require investment and support from donors and other supporters for generations. Therefore, the Trust must develop programs that build relationships as the cornerstone of fundraising effectiveness. These relationships will take place through a series of "touches" managed through events, meetings and other contacts. This may require greater investment up-front that reduces net revenue for some programs in the short-term. However, the long-term benefits should far exceed any limitations that come as a result of investing in relationships for the long run.
5. **Seek multi-year commitments to support Trust activities when requesting support from donors and grantors.** Funders and supporters often are not prepared to make a long-term commitment to support the Trust until we have clearly established our credibility to them. Yet longer-term commitments will make it possible to focus attention on the activities for which the organization was created. Seeking support that includes longer-term commitments may be an important strategy to ensure the "investment" in the organization is a solid one.

#### FUNDRAISING POLICIES

##### Trust Membership Program

Anyone who has within 15 months prior to the annual renewal date given a cash contribution of any amount, or an in-kind contribution that provides benefit to the work of the Trust, will be considered a *member* of the Trust. The organization will develop a benefits and recognition program for members, and assist staff in its implementation. Those members whose cumulative contributions equal or exceed \$500 within the last 15 months will be classified as *major donors* to the Trust, and will be given all recognition and privileges associated with their giving level.

##### Board Fundraising

The board will provide direct support in fundraising activities. This support will be coordinated by the Major Donor and Planned Giving Committee, which will make recommendations to the board regarding the appropriate activities and roles for involvement of other board members. A minimum level of involvement by board members will include a "leadership" gift as a member. A "leadership" gift is defined as a "significant contribution to the organization based on one's individual financial abilities."

##### Fundraising Plan

The Trust will renew its fundraising plan at least every three years. The plan will define fundraising outcomes, strategies and activities based on the programs and priorities established in the strategic plan. The plan will create a framework within which all fundraising programs will take place. Each plan will include a review of existing fundraising policies and offer recommendations for revisions and additions. The Fundraising Committee will be responsible for developing the plan. The Board of Directors will be responsible for approving the plan.



### Restricted Grants and Gifts

Contributions accepted by the Trust will be used to support the mission and goals of the organization. The Trust will accept restricted contributions from any source, so long as the grant or gift are consistent with the mission, goals and program priorities established in the strategic plan and fundraising plan. Until a set of suitable sponsorship guidelines has been adopted by the Board of Directors, any donation given in exchange for an endorsement, sponsorship or similar commitment to a donor must be approved by the board prior to acceptance.

## FUNDRAISING IMPLEMENTATION

The work of fundraising is completed through the activities defined below. These activities are designed to support the strategies and achieve the outcomes defined earlier in this plan. This fundraising plan outlines the *current focus and approach* undertaken by the Trust at the time the plan was adopted, and will be updated regularly to reflect any changes and improvements that must be incorporated.

### Memberships and Major Donors

This plan places a strong emphasis on building a membership base as the foundation for individual giving. Focus for individual giving will be on landowners and professionals with a strong connection to the outdoors. Individuals who make an initial contribution to the Trust will be asked to make more frequent and larger contributions, with the intent of moving those capable of making larger contributions to the major donor focus.

Several priority steps have been identified in the focus on memberships and major donors.

1. **Ensure 100% giving from all board members.** The initial push for all fundraising will be to ask current board members to make a leadership gift to the organization. All current board members will be asked to make a contribution as a major donor to the organization (although any "significant" contribution will be welcomed), contributing cash as well as additional in-kind efforts to support the work of the organization.
2. **Create a Landowner Recognition Program.** The support of landowners in the region will add important credibility to the work of the Trust and its long-term relationships to the communities. The organization has a goal of recruiting up to 30 landowners to be financial supporters of the Trust at any level. A special recognition program will be developed to encourage and highlight the involvement of landowners in the work of the Trust.
3. **Solicit funds from individuals, local businesses and corporate sponsors.** For smaller contributions and initial support from people not yet connected to the organization, the Trust will use direct mail to request support for the organization. These membership requests will seek small initial contributions of \$50 with follow-up mailings asking for additional contributions and upgraded contribution amounts to follow in subsequent mailings. Between mailings, these supporters will be given opportunities to see the work of the organization and hear about progress being made to make the Trust a strong partner with landowners in the protection and stewardship of private land.

For those people with an existing relationship to the Trust and its board, a more personal approach will be taken. A small group of board members led by the Major Donor and Planned Giving Committee will serve as a solicitor group to make contact to and request support for contributions to the Trust. These potential major donors will be asked to make a contribution of \$100 or more, with a focused effort to get them above \$500 within a year.

### Grants

Grants are a very strong possible source of funding for the organization in the initial years of this plan, and could be good investments of time early in the plan process. Proposals will be directed both at the programmatic activities that are core to the mission of the organization, as well as organizational development activities that ensure growth and capacity-building of the Trust.

Several priority steps have been identified in the focus on grant development.

1. **Develop a list of grant-fundable projects.** From the strategic plan, a list of grant-fundable projects will guide the grant proposal writing process. These projects will be defined, priced and prioritized by the Board, and will provide the focus to the work of the people involved in the organization.
2. **Identify program officers and board members, and have meetings with them.** Conversations with foundation program officers can help to identify the opportunities to overlap foundation priorities with Trust projects. The strategic plan will be an excellent discussion tool, helping to establish the credibility of the Trust's program choices as well as helping focus the funding conversation based on an overview of the three-year plans.
3. **Submit proposals to select foundation sources.** Developing and submitting proposals for grant funding will be critical to the generation of revenue to build the organization and support its mission. Proposals will be submitted on a range of issues based on priorities established by the board.

A strong emphasis on capacity-building and start-up grants will dominate the proposal writing focus of the Trust for the next few years. There is a strong possibility that the foundations will respond positively to a matching proposal that asks a foundation to match new membership and major donor contributions brought into the Trust during a one-year period. The Trust may consider investing a portion of its cash reserve as a part of the match formula, further demonstrating commitment to grow the program.

### Systems Development

In the very beginning, the Trust will need to develop some very specific systems to support its fundraising program. A database, still in its infancy, will be an essential tool for the organization and is likely to be a priority.

For now, the systems focus will be on developing the plans necessary to move things forward. The following items have been identified in the focus on systems development.

1. **Develop and maintain the comprehensive fundraising plan.** This plan represents completion of this initial systems activity. It will be further developed and updated annually or as any significant change in approach or resources change the organization's fundraising focus. The new director, once in place, is likely going to want to add additional elements and details to support this plan, and modify those portions to incorporate his vision and priorities for fundraising.
2. **Develop specific implementation plans for all fundraising projects.** This implementation step follows the approach the Trust will take for all program implementation. Once general direction and three-year plans have been established, a group responsible for implementation will develop more specific work plans. The board will review and ensure completion of priority projects.
3. **Develop the database.** A comprehensive and capable database will be very important to support the fundraising programs of the Trust. This program will need the capacity to track details about direct mail acquisition testing and results, major donor cultivation and solicitation and other facets of the annual giving program. This is likely to require either specialized software dedicated to fundraising, or custom modified software to meet the needs of the Trust.

#### **Stewardship Funds**

Stewardship funds will be essential on all lands or easements held by the Trust. The Trust's ability to work effectively with landowners for generations will depend on the raising and managing of sufficient stewardship funds.

Several priority steps have been identified in the focus on stewardship funds.

1. **Solicit stewardship endowment investment for all easement projects.** This is something that needs to be part of every land negotiation undertaken by the Trust. Some exceptions may be warranted in the future, but the organization must establish its precedent early on the development of a stewardship fund for managing interests in lands held by the Trust.
2. **Incorporate stewardship strategy into long-range fundraising plans.** As the Trust develops greater experience and focus on stewardship, it will need to integrate stewardship and fundraising strategies more directly. As the membership and major donor programs yield fruit, strong relationships to supporters will help foster a planned giving program that logically will support the long-term stewardship program of the Trust. Stewardship funds also may be a component of future capital campaigns for land acquisition.

#### **Planned Giving**

Planned giving will provide significant revenue opportunities to the Trust as it develops relationships with donors and supporters over the next several years. Planned gifts are likely outcomes of extended personal cultivation and solicitation, but remain a difficult revenue source to anticipate accurately.

1. **Provide information to supporters and estate planners about planned giving options.** Developing initial materials to support the Trust through planned giving might take place initially, but are likely to be most effective only after the membership and donor programs have developed some strong, positive relationships of several years.

OR





# problem summary

**too many strategies,  
being pursued by too  
few people, with no  
clear focus**

# The Answer



You don't have to  
master every  
fundraising technique  
out there to raise  
big bucks.

You don't even have to  
use every fundraising  
technique.

You only have to do  
**6 THINGS**  
**REALLY WELL**  
to create a stream of  
predictable, growing and  
sustainable contributed  
revenue.

# The 5 Keys to Fundraising Success



#1

FOCUS ON  
RELATIONSHIPS, NOT  
TRANSACTIONS



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1. Board fundraising
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16. Sponsorships
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18. In-kind fundraising
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20. Earned income strategies

transactional  
vs.  
relational  
donors





Transactional  
fundraising  
creates  
customers, not  
donors.

# LIFETIME VALUE

customers  
vs. donors

#2

# ADOPT A “RETENTION FIRST” FUNDRAISING PHILOSOPHY



the pyramid

**WE HAVE  
TO RETAIN  
THEM**



45%

Fundraising Effectiveness Project (FEP)

RETENTION >  
ACQUISITION

People give to folks that  
they KNOW, like and trust

People KEEP GIVING to  
folks that they KNOW,  
like and trust





Barbara

Dear Sir/Madam





# Report on Impact

Tell them what you did  
with their last donation  
before you ask for  
another one!

# #3

# SEND RESPONSE OPTIMIZED MAIL APPEALS





# STORY TIME



# story characteristics

- Compelling story about 1 **PERSON**, place or thing
- Rich detail (create a vivid picture)
- Brings up a **SOLVABLE** problem
- And ...



ask the reader to do  
**ONE** thing, and only  
**ONE** thing: DONATE

PICK THE RIGHT  
ENVELOPE

6106 Wallingford Way  
Mechanicsburg, PA 17050



JOE DONOR  
123 ANY WAY  
ANYTOWN, PA 12345

# most effective envelopes

1. Plain white, stamped, hand-written, no organization name
2. Brightly colored
3. Oversized
4. Standard organization logo #10 with nonprofit indicia

#4

HOLD NO MORE THAN  
2 SPECIAL EVENTS PER  
YEAR + FOCUS ON  
SPONSORS, NOT  
ATTENDEES



walk/run

golf tournament

What's the first

talent show

casino night

thing people

auction

gala

suggest as a way to

yard sale

bingo

raise money for a

raffle

charity?

bake sale

bake sale

awards banquet



successful events  
require 4 months of  
staff focus

(3 prior & 1 after)

SPONSORS >  
TICKETS

$$200 \text{ tickets} \times \$30 = \$6,000$$

$$20 \text{ sponsors} \times \$300 = \$6,000$$

$$5 \text{ sponsors} \times \$3,000 = \$15,000$$





PRESENTING SPONSOR

#5

**BUILD PERSONAL  
RELATIONSHIPS WITH  
THE TOP 10% OF  
DONORS**



What do you do with all that time you save by not have 6 events per year?



What's the best  
way to approach a  
potential donor?

**PEOPLE GIVE TO PEOPLE  
(NOT EMAILS)**

set a visit goal

block time for visits

& for requesting visits

# Chad's Favorite Donor Visit Questions

So, as you know I wanted to speak about ABC Charity today ...

- What do you know about us?
- What first led you to become involved with our organization?
- What excites you about our current programming?
- What could we be doing better?

#6

CONVERT AS MUCH  
OF THE BOTTOM 90%  
AS POSSIBLE TO  
RECURRING MONTHLY  
GIVING



How to earn free lunch  
for life from your  
organization's CFO ...

- 1) Steady
- 2) Predictable
- 3) Recurring
- 4) Revenue

recurring monthly donors  
give **42% more** than  
regular donors over the  
course of a year

45%



85%

What's the best way  
to convert a donor to  
monthly giving?

**SIMPLY ASK ... PEOPLE  
GIVE TO PEOPLE**



*The End!*

# further learning

## @fundraiserchad





FREE WEBINAR

How to Get DONOR visits & Knock  
Them Out of the PARK

@fundraiserchad

**10/24 - 12pm (eastern)**

# questions

[productivefundraising.com/resources](https://productivefundraising.com/resources)

