



TEMPLE
UNIVERSITY

**FUNDRAISING
CERTIFICATE PROGRAM**



Closing Intensive Agenda

1. Re-Introductions
2. Fundraising in the Time of COVID-19
3. Fundraising Planning
4. General Differences / Donor Motivations
5. Fundraising Writing Exercises
6. Fundraising Ethics
7. Further Learning
8. Program Wrap Up
9. Open Q&A
10. Office Hours



Re-Introductions



Who are you?

name

role

organization

most surprising thing you've
learned about fundraising?



How to Fundraise in the Time of COVID-19

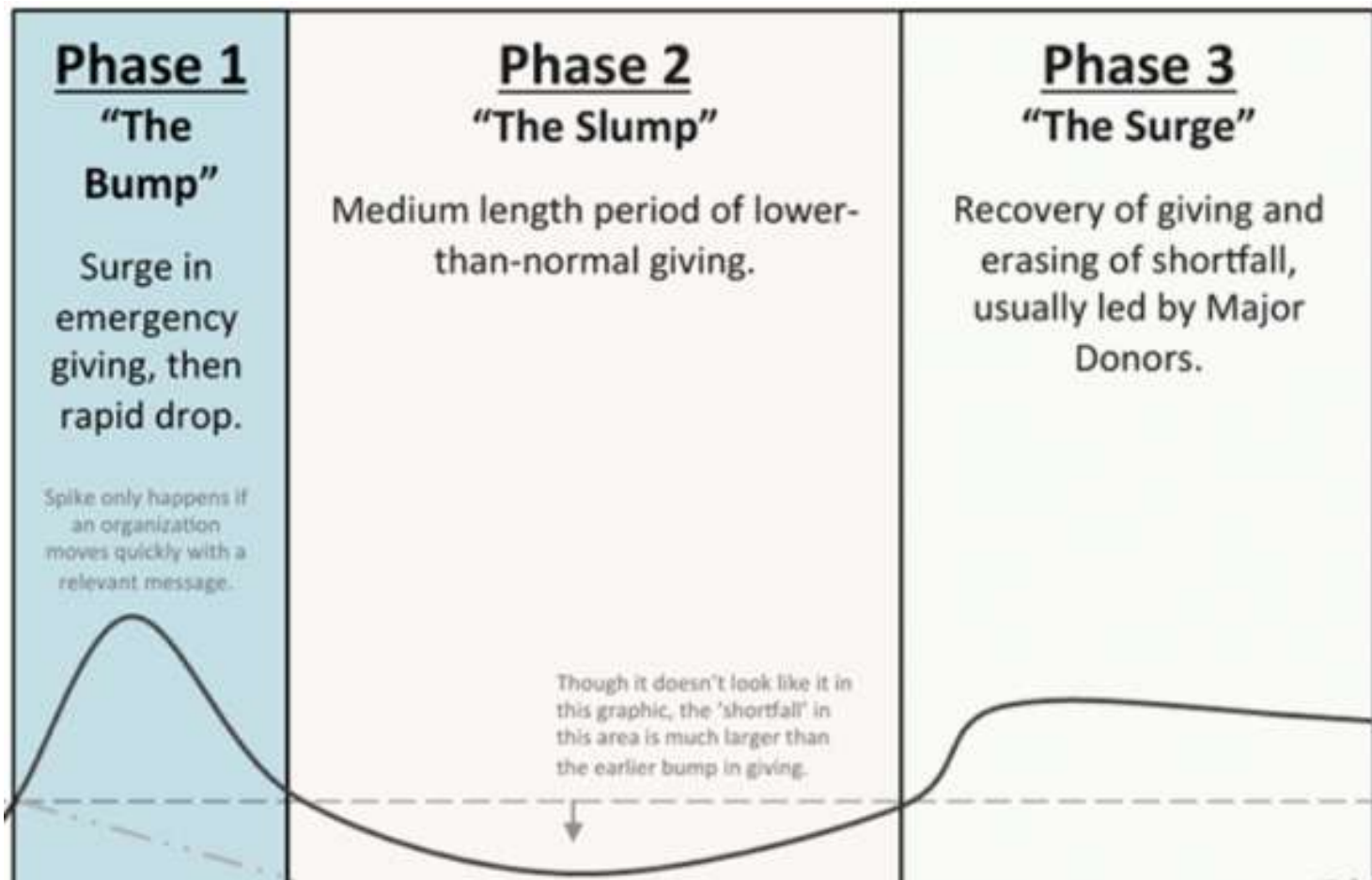


What Do Past Events Tell Us?



PAST EVENTS WITH MAJOR IMPACT ON FUNDRAISING

- 9/11
- Tech Bubble Burst
- Great Recession
- Major Domestic Natural Disasters
- Major Election Years



source: The Better Fundraising Co. (Steven Screen)

During the Great
Recession the S&P 500
dipped 39 percent, but
giving only dropped by
8 percent.

source: Pursuant

PRELIMINARY RESULTS

In a shift from the first quarter of the year, charitable giving increased by almost 7.5% over the first half of 2020, compared to the first half of 2019.

Giving from the first quarter of 2020 was 6% behind first quarter giving in 2019, and many charities were worried that the data didn't yet show the impact of the pandemic because COVID-19 had not spread significantly by the end of March. But a 19.2% increase in smaller donations (less than \$250) in the second quarter was an important driver for this turnaround. The overall number of donors increased by 7.2% with new donors increasing by 12.6%, showing a renewed interest in supporting the work of nonprofits.

LONG TERM IMPACT

- Influx of first time donors (especially younger donors)
- Some will retreat, but other donors will step up (fewer donors, more \$)
- Crises teach people to give & give more generously
- Long term growth for the sector

Communicating NOW



silent =
forgotten

transparent

not tone deaf

NOT THIS

Update on How We're
Responding to COVID-19

DO THIS INSTEAD

“Because of you, we are
able to respond.”

(or “weather the storm”)







CALL YOUR DONORS

- Call to check in – people are home and answering their phones
- NO ASK (“We’re just reaching out to our supporters to see how they’re doing in this difficult time.”)
- People are starving for social interaction
- Prioritize donors that live alone
- A rare chance for us to HELP them



Fundraising NOW



FIX YOUR MINDSET

Your donors are amazing, and they want to help. Let *them* decide what is relevant and important to them. Your job is to clearly state how your beneficiaries and your organization are being impacted by this situation. And how the donor can help. Share a current need that they can act on. Don't let your unease with asking take away from a donor the chance to make an impact and feel better about the world.

FUNDRAISING EVENTS

For all events before fall 2021, pick your poison...

- Cancel (but try to keep the money)
- Postpone
 - VERY crowded late 2021 / when will folks be comfortable in crowds?
- Go virtual

virtual event sponsorships

- Don't downplay the opportunity / build excitement
- Don't discount
- Use technology to provide even more value
- Make it a part of something bigger (year round partnership vs. one day sponsorship)

CAPITAL CAMPAIGN IMPACT

- Stay the course
- Extend payment windows
- Delay going public
- It's the perfect time for planning and donor conversations
- The market will determine GO TIME

CARES ACT GIVING INCENTIVES

- Temporary Universal Charitable Deduction (\$300)
 - You can tell them!
- Corporate Giving = increased annual limit from 10% to 25% of taxable income
 - Not all impacted equally by economic slowdown

Preserve
FUNDRAISING STAFF
at all costs.

Sample Language / Additional Resources



FOR INDIVIDUAL DONORS

"While it is certainly not ideal to be asking you for support at this time, I feel as the leader of this organization that I have the obligation to offer you the opportunity to invest in us again during this critical time."

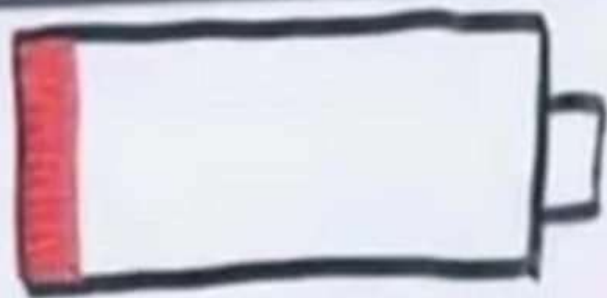
FOR CORPORATE DONORS

"We can only imagine the decisions you and your company must make during this time of crisis. What can we do to help you? If there are any opportunities for us to partner together now, we would be more than willing to work with you as we have in the past."

Source: Laura Fredricks

FOR FOUNDATION DONORS

"Your foundation has so generously supported us this year with a grant of [amount] for [program]. While we are most certain you are receiving numerous requests right now, may we have your permission to use the remainder of the grant for our general operations? Attached please find our crisis response plan detailing our operating shortfall and how this conversion would allow us to narrow the gap and preserve our valuable programs."



You wouldn't let this happen to
your phone.

Don't let it happen to you either.

Self care is a priority.
Not a luxury.



The End!

questions



Fundraising Planning Pitfalls & Pointers



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%
Total Revenues	161,230	100%	252,865	100%	440,027	100%	386,626	100%
<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%
Total Expenses	161,230	100%	252,865	100%	440,027	100%	386,626	100%

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%
Total Acquisition	40,054	100%	49,795	100%	81,101	100%	83,101	100%
<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%
Total Stewardship	44,798	100%	56,055	100%	124,530	100%	64,529	100%
<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%
Total Outreach	17,639	100%	39,488	100%	59,339	100%	59,339	100%
<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%
Total Fundraising	29,154	100%	50,465	100%	103,636	100%	105,636	100%
<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%
Total Admin	29,585	100%	57,062	100%	71,421	100%	74,021	100%

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.

Develop partnership relationships with professional estate planners. Part of the focus of this program – and likely its most important strategy – will be developing trusted relationships among the attorneys and other estate planners in the region that landowners trust. These opinion leaders will be the focus of initial outreach and education efforts to support the long-term funding needs of the Trust.

2. *Develop effective cultivation efforts as part of membership and major donor programs.*

Estate gifts will come to the trust when donors and members feel like they are “part of the family” of the Trust, and have confidence that their estate contribution will provide long-term conservation benefits to the community. That confidence will come through years of relationship building that will be important components of the membership and major donor programs. The inter-relationship of the membership, major donor and planned giving programs will be most important in this area of long-term cultivation.



PITFALL #1

a long, wordy plan
that no one wants
to read



and where
does it live?



PITFALL #2

a static, printed
plan that lives on a
bookshelf



but what does the
fundraising plan
look like at most
nonprofits?

PITFALL #3

having no plan at all





walk/run

golf tournament

talent show

What's the first

casino night

auction thing people gala

suggest as a way to

yard sale

bingo

raise money for a

raffle

charity?

bake sale

bake sale

awards banquet



POINTER #1

a fundraising plan
allows you to be
proactive, rather
than reactive



slides?

productivefundraising.com/resources



A Simplified Planning Process



PLANNING STEP 1

evaluate

569	94 330	81 042	59 8
6 203	7 142	30 724	96
17 240	65 940	41 066	39
41 646	83 065	37 386	
46 422	41 600	20 220	
35 047	91 901	1 342	
69 163	8 870	44 872	
53 213	87 626	51 720	
15 193	10 939	19 544	
98 933	48 940	63 118	
95 403	37 995	70 93	
49 112	42 783	54 1	
76 731	7 210	80 F	
58 021	33 866	25	
83 612	53 014		
57 226	23 076		
39 344	63 593		
47 642	42 234		
44 279	90 208		
28 452	85 507		
43 797	18 403		
89 567	6 480		
34 828	20 88		
1 124	84 8		
93 124	81		
19 027	35		
62 934	3		
18 884			
47 368			
58 966	58 330		
20 609			

Revenue				
	Current Month		Year to Date	
	Amount	% of Sales	Amount	% of Sales
Gross sales	1,250,000	45	2,720,000	34
Less sales returns and allowances	180,000	60	800,000	48
Net sales	1,070,000	1	1,920,000	1

Cost of Sales				
	Current Month		Year to Date	
	Amount	% of Sales	Amount	% of Sales
Beginning inventory	540,000	1	45,000	0
Plus goods purchased/manufactured	200,000	0	250,000	0
Total goods available	38,000	0	295,000	0
Less ending inventory	20,000	0	200,000	0
Total cost of goods sold	1,050,000	1	1,825,000	1

Operating Expenses				
	Current Month		Year to Date	
	Amount	% of Sales	Amount	% of Sales
Selling				
Salaries and wages	122,000	0	65,000	0
Commissions	112,000	0	32,000	0
Advertising	335,000	0	22,000	0
Depreciation	10,000	0	37,000	0
Total selling expenses	579,000	1	136,000	0
General/Administrative				
Salaries and wages	20,000			
Employee benefits	33,000			
Payroll taxes	70,000			
Insurance				
Rent				
Utilities				
Depreciation				



Category	Actual	Budget	Variance	Actual	Budget	Variance	Actual	Budget	Variance	Actual	Budget	Variance	Actual	Budget	Variance	Actual	Budget	Variance	Actual	Budget	Variance
PROFIT AND LOSS																					
Revenue	85,000	75,000	10,000	85,000	75,000	10,000	85,000	75,000	10,000	85,000	75,000	10,000	85,000	75,000	10,000	85,000	75,000	10,000	85,000	75,000	10,000
Cost of Sales	50,000	45,000	5,000	50,000	45,000	5,000	50,000	45,000	5,000	50,000	45,000	5,000	50,000	45,000	5,000	50,000	45,000	5,000	50,000	45,000	5,000
Operating Expenses	10,000	10,000	0	10,000	10,000	0	10,000	10,000	0	10,000	10,000	0	10,000	10,000	0	10,000	10,000	0	10,000	10,000	0
Net Profit	25,000	20,000	5,000	25,000	20,000	5,000	25,000	20,000	5,000	25,000	20,000	5,000	25,000	20,000	5,000	25,000	20,000	5,000	25,000	20,000	5,000
BALANCE SHEET																					
Assets	100,000	100,000	0	100,000	100,000	0	100,000	100,000	0	100,000	100,000	0	100,000	100,000	0	100,000	100,000	0	100,000	100,000	0
Liabilities	50,000	50,000	0	50,000	50,000	0	50,000	50,000	0	50,000	50,000	0	50,000	50,000	0	50,000	50,000	0	50,000	50,000	0
Equity	50,000	50,000	0	50,000	50,000	0	50,000	50,000	0	50,000	50,000	0	50,000	50,000	0	50,000	50,000	0	50,000	50,000	0



evaluate, but don't
over-analyze

PITFALL #4

don't over analyze



9 point performance index

1. Participants + Non-Responders

2. Income

3. Expense

4. Percent Participation

5. Average Gift

6. Net Income

7. Average Cost Per Gift

8. Cost of Fund Raising

9. Return

POINTER #2

use a simplified
evaluation tool





Solicitation Performance Index

based on James M. Greenfield's Nine-Point Performance Index

PERFORMANCE INDICATOR	SOLICITATION 1	SOLICITATION 2	SOLICITATION 3	SOLICITATION 4	SOLICITATION 5	SOLICITATION 6	SOLICITATION 7	SOLICITATION 8	SOLICITATION 9	TOTALS
Solicitations Made/Sent										-
1. Participants										-
2. Income										\$ -
3. Expense										\$ -
4. Percent Participation										#DIV/0!
5. Average Gift										#DIV/0!
6. Net Income										\$ -
7. Average Cost Per Gift										#DIV/0!
8. Cost of Fund Raising										#DIV/0!
9. Return	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!

DATA YOU ENTER

productivfundraising.com/resources

POINTER #3

know your donor
retention rate &
make improving it a
priority



donor retention rate

productivfundraising.com/resources

45%

Fundraising Effectiveness Project (FEP), 2018

POINTER #4

evaluate your
events & go deeper
than just net
income



PLANNING STEP 2

plan (simply)

analyze your data

What do I want to ...

- Cease doing?
- Decrease doing?
- Maintain doing?
- Increase doing?
- Start doing?

POINTER #5

use a simplified
planning template
& don't print it



the document

For each strategy (what we will do):

1. Rationale (why are we doing it?) - 1 sentence
2. (Simple)Plan (how will we do?) - 1 paragraph
3. Timetable (when will we do it?) - 1 sentence
4. Responsible Parties (who will do it?) - 1 sentence
5. Projected Expense - 1 number
6. Projected Income - 1 number

IMPROVING DONOR RETENTION MUST BE A STRATEGY!

Sample Simplified Fundraising Plan

Last Year's Results:

<i>Total Raised</i>	\$178,457	93% ROI
<i>Personal Solicitation</i>	\$50,432	394% ROI
<i>Board Solicitation</i>	\$29,417	297% ROI
<i>Direct Mail</i>	\$61,747	243% ROI
<i>Special Events</i>	\$19,431	23% ROI
<i>Online Donations</i>	\$5,430	8% ROI
<i>Grants / Foundations</i>	\$12,000	75% ROI
<i>Donor Retention Rate</i>	61.3%	

This Year's Plan:

<i>Fundraising Goal</i>	\$215,000 (+20%)
<i>Retention Goal</i>	65% (+3.7%)

Strategy	<i>Direct Mail (Increase)</i>
Rationale	<i>Direct mail is one of our largest areas of income with one of the highest returns on investment.</i>
Plan	<i>Send an annual appeal (per normal schedule) and launch a spring appeal as well.</i>
Timetable	<i>Appeal one mailed by 4/30 Appeal two mailed by 11/30</i>
Responsible Parties	<i>Director of Development</i>
Projected Expense	<i>\$8,750</i>
Projected Income	<i>\$75,000</i>

Strategy	<i>Donor Retention (Increase)</i>
Rationale	<i>It is more cost effective to keep our current donors than acquire new ones.</i>

productivfundraising.com/resources

[organization name]
[year] Fundraising Plan

Funding Focus Area	LY Actual	Goal	% Change	Strategies	Tactics	Expense	When?	Who?	Notes
Personal Solicitations / Major Giving	\$750,000	\$800,000	6.7%	Strategy 1	Tactic 1	\$17,500	1/1/2000	GB	Note 1
					Tactic 2	\$3,200	1/1/2000		
				Strategy 2	Tactic 1	\$800	1/1/2000		
					Tactic 2	\$5,000	1/1/2000		
Board Giving	\$750,000	\$800,000	6.7%	Strategy 1	Tactic 1	\$17,500	1/1/2000		
					Tactic 2	\$3,200	1/1/2000		
				Strategy 2	Tactic 1	\$800	1/1/2000		
					Tactic 2	\$5,000	1/1/2000		
Mail Appeals	\$750,000	\$800,000	6.7%	Strategy 1	Tactic 1	\$17,500	1/1/2000		
					Tactic 2	\$3,200	1/1/2000		
				Strategy 2	Tactic 1	\$800	1/1/2000		
					Tactic 2	\$5,000	1/1/2000		
Special Events	\$750,000	\$800,000	6.7%	Strategy 1	Tactic 1	\$17,500	1/1/2000		
					Tactic 2	\$3,200	1/1/2000		
				Strategy 2	Tactic 1	\$800	1/1/2000		
					Tactic 2	\$5,000	1/1/2000		
Online / Monthly Giving	\$750,000	\$800,000	6.7%	Strategy 1	Tactic 1	\$17,500	1/1/2000		
					Tactic 2	\$3,200	1/1/2000		
				Strategy 2	Tactic 1	\$800	1/1/2000		
					Tactic 2	\$5,000	1/1/2000		
Sponsorships / Corporate Giving	\$750,000	\$800,000	6.7%	Strategy 1	Tactic 1	\$17,500	1/1/2000		
Grants / Foundation Giving	\$750,000	\$800,000	6.7%	Strategy 1	Tactic 1	\$17,500	1/1/2000		
Donor Stewardship	Retention			Strategy 1	Tactic 1	\$17,500	1/1/2000		
					Tactic 2	\$3,200	1/1/2000		
				Strategy 2	Tactic 1	\$800	1/1/2000		
					Tactic 2	\$5,000	1/1/2000		
Totals	\$5,250,000	\$5,600,000	6.7%			\$ 212,000			

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POINTER #6

include 2 new ideas
in your plan each
year





The paradox of risk:

1. Don't put all your eggs in one basket. If you lose the basket, you lose it all.
2. Don't put your eggs in too many baskets. The more baskets you manage, the less energy you can put into each one. It's risky to do things halfway.

Diversified, but focused.

source: James Clear

PLANNING STEP 3

systematize



POINTER #7

build implementation
into your
organization's
systems



Two options ...

- Make it someone's job (weekly)
- Transfer the tasks into your task/project management system

That's it ... you are
DONE!

POINTER #8

surround yourself
with fundraising
inspiration





If it ain't
broke,
don't fix it.



A woman with her hair in a bun, wearing a grey long-sleeved shirt, is sitting on a brick-paved ground. She is looking down at a tablet device she is holding in her hands. The tablet screen is black. The background is a brick-paved ground.

 pocket





afpglobal.org



sofii showcase of fundraising
innovation and inspiration

sofii.org

BROOKS THE FUNDRAISER'S GUIDE TO IRRESISTIBLE COMMUNICATIONS EMERSON & CHURCH

Greenfield Fund Raising Second Edition WILEY

Getting Things Done David Allen The Art of Stress-Free Productivity VIKING

The Ultimate Networker Reveals How to Build a Lifelong Community of Colleagues, Contacts, Friends, and Mentors never eat alone KEITH FERRAZZI WITH TAHL RAZ

PENELOPE BURK DONOR-CENTERED FUNDRAISING US EDITION

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FUNDRAISING PROGRAM DOVE JOSSEY-BASS



POINTER #9

be prepared to make
the case for change



show them the
numbers



The End!

questions



10 minute break



Generational Differences in Giving & Donor Motivations



DISCUSSION: Why do you give?



The Seven Faces of Philanthropy



Fundraising Writing Exercises



2 DISCLAIMERS ...

1) If You Solicit Me, I May Share
Your Appeals

2) Personal Preference \neq
Fundraising Best Practice

Critique of Real Life Direct Mail Pieces





Dear Chad,

This year will be one for the record books. So far in the 2016 Fiscal Year:

- We provided food and grocery products equivalent to more than 40 million meals to those facing hunger.
- We distributed nearly 50 million pounds of food to more than 900 soup kitchens, shelters and food pantries in 27 central Pennsylvania counties.
- The number of meals and snacks we provided to children in need through our Youth Programs increased 16%.
- The number of seniors we served increased for the 8th year in a row.

I have no doubt that in the upcoming year there will be just as many people in our community who are facing hunger and will need help getting food. But I also have the confidence that we can continue to provide the healthy, nutritious food that everyone deserves. But we can only do that with your continuing partnership. **It is your support that enables us to do all that we do. Thank you!**

As we approach the end of the year, we need your help one more time in 2016 to help families in our community who are facing hunger. As a loyal friend of Central Pennsylvania Food Bank, I know fighting hunger in central Pennsylvania is important to you. **Please help us today so we can help supply food where it is needed most.** Remember, for every \$10 you give, the Food Bank can provide 60 nutritious meals to those in need. Your gift means so much, especially at this time of year. It means that thousands of our hungry neighbors can look forward to a new year of hope.

While the task of solving hunger is daunting, working together, we know we can ensure that no child, no parent and no senior goes hungry in our community. **Thank you again for your support!**

We wish you and yours a very happy and peaceful new year!

Joe Arthur
Executive Director



To ensure a tax benefit for 2016, be sure we receive your gift before Dec 31st!

24879

Central Pennsylvania Food Bank
 3908 Corey Road
 Harrisburg, PA 17109
 (717)-564-1700
 www.centralpafoodbank.org

Phone: _____



Yes I want to help the Food Bank provide food to hungry children, seniors and families in our community. I'm enclosing a gift of:

- \$50 provides 300 nutritious meals.
- \$75 provides 450 nutritious meals.
- \$100 provides 600 nutritious meals.
- \$_____ to help out as much as possible.

To make a secure online donation, please visit www.centralpafoodbank.org

Chad Barger
 6106 Wallingford Way
 Mechanicsburg PA 17050-7324 90

Central Pennsylvania Food Bank
 PO Box 62030
 Harrisburg, PA 17106-2030

I would like to receive email updates at: _____ 35062 612T915

Dear Chad,

I thought my life was over. My family put me out in the trash. And I was sad. I was sad because I knew that there was so much more life left in me. I kept looking out for someone to save me! And person after person passed by me like I was invisible. Like I was trash.



And then you passed me. You hit the brakes and turned your car around. Before I knew it, you scooped me up because you wanted to make a difference.

You heard that The Common Wheel could use donated bikes for their programming. And when you saw me sitting sadly on the curb, you knew you could find someone who would love me once again.

You changed my life for the better. And because of you, I'm able to make a child's face light up with a smile. You are helping me make children and their parents happier, healthier, and wealthier.

But it's not just about picking out good bikes like me out of the trash. That's only the beginning! With a donation of \$200, you can help my friends at The Common Wheel find me a good home. Your donation will support programs like Bikes for All and Earn-a-Bike.

Recently, my friends and I had the BEST DAY EVER! We got to go to a new home through The Common Wheel's Maryann Caldwell Holiday Bike Drive. Volunteers made sure I looked and felt good. And

a Bike Buddy helped find me my perfect match! You helped me put the biggest smile on a child's face. I've never felt so loved!

We both know that The Common Wheel is doing great work. But with the winter months approaching, fewer people are looking to buy and ride bikes. **You can help The Common Wheel get through hibernation with your donation of \$200.**

You can continue to transform our community through the power of bikes! And, you'll make a difference in a life just like mine ... and even more importantly, change the life of the person who becomes my new owner.



Cycling Yours,

Chad,
Thank you so much for your
wisdom and encouragement over the
past year. I've learned so much and
look forward to learning
even more! Wishing you a very
happy new year!

Cheers,
Adriana

Becky the Bike

P.S. Your gift of \$200 (or more) TODAY will make sure the lights and heat stay on during the winter (to keep bikes like me nice and cozy)!

HOMELAND CENTER

A History of Caring Since 1867

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Dear Friend of Homeland Center,

Personal Care resident N.W. was thrilled to be able to don special event attire and attend her granddaughter's wedding and reception. Held at Ashcombe Farms, she was welcomed with open arms and received VIP treatment from all of the guests.

The joy of hearing the Harrisburg Symphony, a trip to the Baltimore Aquarium or Madame Tussauds Wax Museum in New York...such excursions and many other opportunities enlighten our residents and enrich their lives.

These are but a few ways in which for nearly 150 years, Homeland Center has demonstrated not only a long standing tradition of assuring the highest standard of clinical care, but also providing opportunities that equally are as important to the quality of life for our residents. That has been, and will continue to be our commitment for each resident as well as for their families.

In keeping with the spirit of benevolence on which Homeland Center was founded, all residents' needs are met regardless of established government funding or the resident's personal, limited resources. Last year, almost \$3 million was spent on this charitable care.

Very often new residents come from an environment of isolation, poor eating habits and a disconnection from friends. Homeland Center offers the emotional support that we all need. We treat each resident as if they were our own family member. Once here, they often blossom and their quality of life is restored and often enhanced.

Recognitions such as being named "Simply the Best" by Harrisburg Magazine for the past five years and more recently, one of Best Nursing Homes in U.S. News and World Report are most significant. However, the achievement to which we are most dedicated is assuring that each of our 145 residents receive the highest quality of physical, emotional and spiritual care.

Thank you for your generous support to Homeland Center which has made this possible. With your continued support through a gift to our benevolent fund, you help assure that today's residents and those in the future will live in a safe and caring home where they receive the highest quality of care. Each and every donation makes a difference. In this celebration year, we pledge to continue our Founder's vision for care and compassion.

Gratefully,

Morton Spector
Chair, Trustees

Carlyn Hughes Chulick
Trustee

Karen F. Snider
Trustee

Big Brothers Big Sisters. OF YORK & ADAMS COUNTIES

11/19/18

Chad Barger
6106 Wallingford Way
Mechanicsburg, PA 17050

Dear Mr. Barger, *Chad*

Kohen was only 8, but he was already at a crossroads. He had lost his father at age two. With no father figure in his life, he could have looked for guidance in all the wrong places, latched on to bad people, and walked a path no one should go down. But, because of you, his life is different.



Without your support, Kohen's mother may have never called Big Brothers Big Sisters of York & Adams Counties to sign him up as a Little Brother and he may have never met his Big Brother, Jim. **Jim is a normal guy who just wants to make a difference in a kid's life.** He got his chance with Big Brothers Big Sisters and Kohen, thanks to you.

The time they spend together every weekend is doing wonders for Kohen as he grows into a young man. Instead of slacking off in class and getting into trouble after school, Kohen is studying and playing games with Jim. You made it possible for them to

form this bond and **Kohen now has a strong mentor to show him the way.** His potential knows no limit thanks to his defenders: Jim and **YOU.**

Not all kids are as lucky as Kohen. When kids have no one to show them the way, they get lost. If nobody acts now, Julian, a 13-year-old young man on our waiting list, will be too old to be paired with a Big Brother. He needs you to step up and support Big Brothers Big Sisters so he can have his own mentor to steer him towards a bright future. Otherwise, he may very well go down the wrong path, appear in the headlines for all the wrong reasons, and never reach his full potential.

By training our staff, you, more than anyone else, have stepped up time and time again to make life-changing relationships like Kohen and Jim's possible. We hope that you will step up one more time by making another gift.

Your support makes a difference. **Please donate today.** Your donation makes relationships like Jim and Kohen's possible and can change the course of Julian's life. Thank you for your time and consideration.

Our life-changing mentoring relationships exist because of people like YOU.

Sincerely,



Linda Z. Gorter
Executive Director
Big Brothers Big Sisters of York & Adams Counties
(717) 810-7986
lgorter@bbbsyorkadams.org

P.S. There are over 100 kids like Julian on our waiting list who need Big Brothers or Big Sisters. Be their champion. Please donate TODAY.



Collaborative Appeal Revision Exercise



questions



10 minute break



Fundraising Ethics



Case Studies



For each solution you consider...

- If you use this solution, will you be able to look in the mirror and feel proud?
- Is your solution one for which your organization can stand tall in front of its donors and clients?
- Given today's climate, would this solution stand up under the scrutiny of the press?



Case Number 1

You get a telephone call from the daughter of one of your oldest donors, a woman in her mid-80s who is still mentally alert. The woman has considerable wealth, and the daughter explains that her mother plans to leave more than 80 percent of her wealth to your organization in her will. The daughter goes on to state that the remaining amount that will go to the woman's four children and six grandchildren will be insufficient to meet their needs. The daughter pleads with you to reason with her mother, reduce the amount intended for your organization, and increase the amount to the family. What should you do?



Case Number 2

Mr. John Smith and his family have been supporters of your organization for several years. He is a successful stockbroker, a generous donor, and a member of your governing board. For years his firm has invested your organization's funds. Both he and the organization have benefited substantially from this arrangement. Recently, however, the board adopted a conflict-of-interest policy stating that board members may not directly profit from business they do with the organization.

Mr. Smith continues his board membership, and he continues to give generously. In addition, he talks of his intentions for your organization in his estate plans. However, he would like for you to see what can be done to get the organization's brokerage business back. How do you handle his request?



Recommendations for Further Learning





afpglobal.org

BROOKS THE FUNDRAISER'S GUIDE TO IRRESISTIBLE COMMUNICATIONS EMERSON & CHURCH

Greenfield Fund Raising Second Edition WILEY

Getting Things Done David Allen The Art of Stress-Free Productivity VIKING

The Ultimate Networker Reveals How to Build a Lifelong Community of Colleagues, Contacts, Friends, and Mentors never eat alone KEITH FERRAZZI WITH TAHL RAZ

PENELOPE BURK DONOR-CENTERED FUNDRAISING US EDITION

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FUNDRAISING PROGRAM DOVE JOSSEY-BASS

Course Wrap Up





productive
FUNDRAISING

with Chad Barger, CFRE

@fundraiserchad



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Group Open Q&A



Office Hours

Time - Student

