

Fundraising Training for Library Trustees & Leadership Volunteers



AGENDA:

1. Introductions
2. What is Fundraising (really) & How Nonprofits Do It
3. Your Fundraising Duties as a Trustee
4. Telling the Library's Story
5. The Asking Process
6. Donor Retention – The Board's Calling
7. Q&A

SLIDES + RESOURCES

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Who is this guy?

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

career
fundraiser



CFRE™



productive
FUNDRAISING



What is Fundraising? (really)





FUNDRAISING is
not what you think it
is ...



Begging=you have the power

Demanding=I have the power

Asking=we have a relationship

@amandapalmer #IFC2016

The focus should
not be on the ASK,
it should be on the
CONNECTION.

It's not how do we
ASK people to give,
it's how do we LET
people give. It's an
INVITATION.

We can't **INVITE**
someone to do
something unless we
have a **RELATIONSHIP**
with them.

Fundraising is about
RELATIONSHIP
BUILDING
(always).

And How Do Nonprofits Do It?

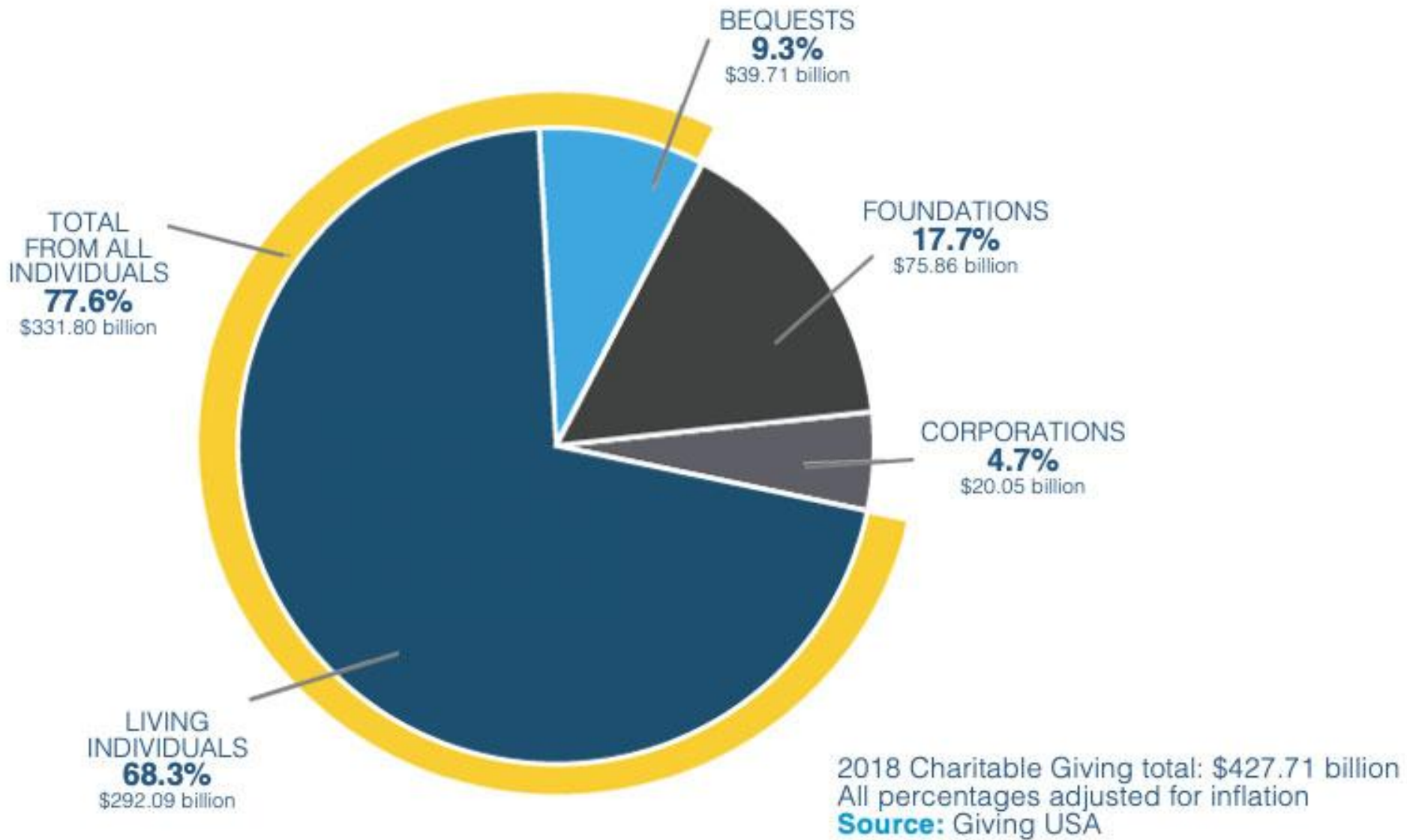
(Fundraising 101 in 6 slides)

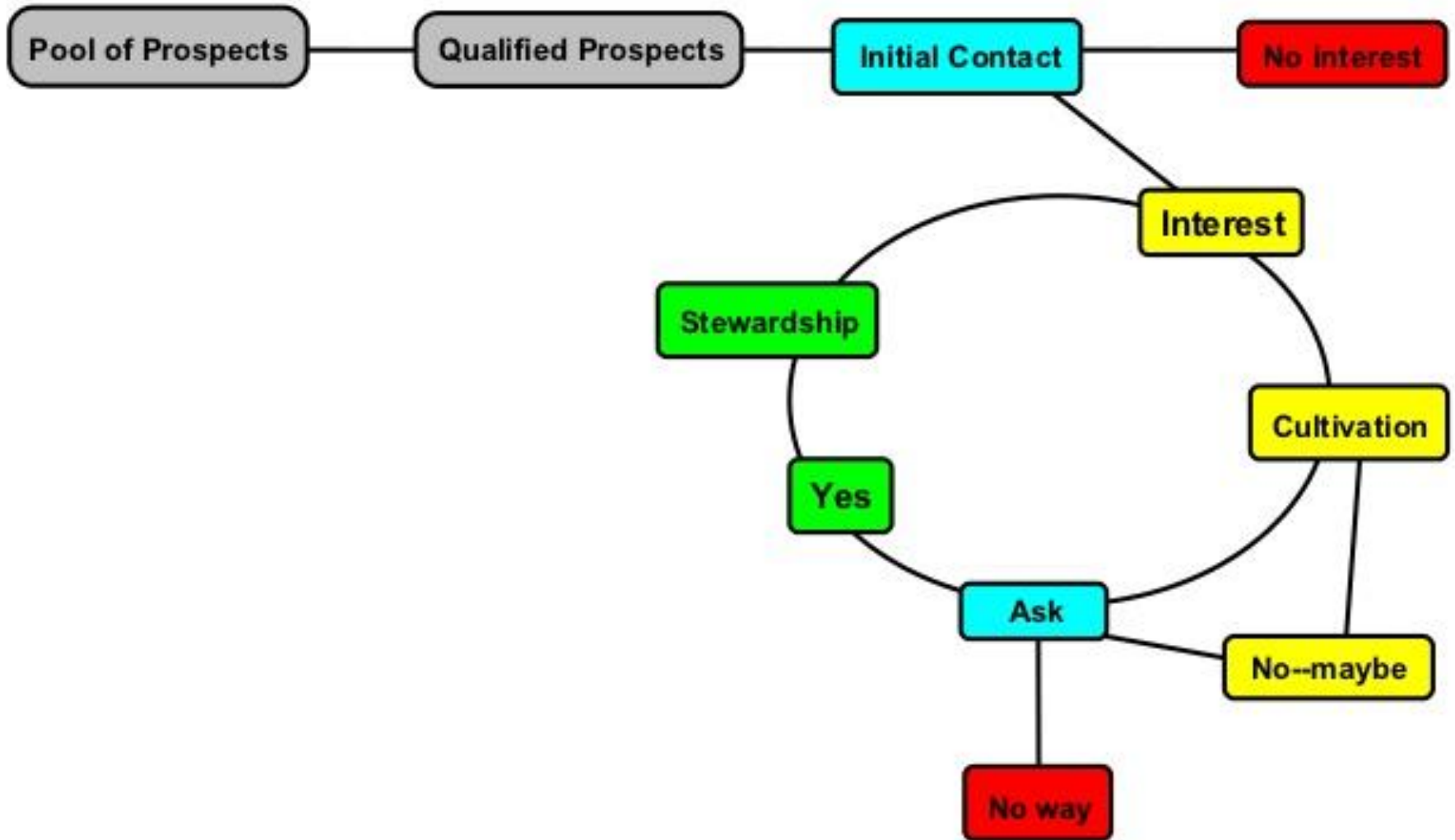


the pyramid



the chart





In person

Peer to peer

By mail

By events

By email

Via crowdfunding

On a web site

By phone

By advertising

donor centrisms

Does it make the donor feel
important, valued &
considered?

43%

29%

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.**

The Trustee's Role in Fundraising



The Board's Role in Resource Development

- Donor
- Visionary leader
- Risk mitigator
- Fundraising ambassador
- Fundraising supporter

Board Strong



<http://productivefundraising.com/resources/strong/>

by:

A program of



LEADERSHIP
HARRISBURG AREA
Leaders Serving.



THE FOUNDATION
FOR ENHANCING
COMMUNITIES

ORRSTOWN BANK
FINAL FOCUS
PRODUCTIONS

Telling Our Story



exercise:

what's our mission?

THE MIDDLETOWN FREE LIBRARY
ASSOCIATION INC. EXISTS TO HELP
THE PEOPLE OF OUR COMMUNITY
ACHIEVE THEIR FULL POTENTIAL
THROUGH THE TRANSFORMATIVE
POWER OF INFORMATION,
IMAGINATION AND IDEAS.

Blah blah blah since
1958 blah blah blah our
founder's vision blah
blah cutting-edge blah
blah sustainable blah
blah we are so dang
awesome!

your mission \neq
your story



Part 1

“We help [who],”

[who] examples: children, students, residents, citizens, the homeless, seniors, animals, farmers, artists, etc.

Part 2

“So they can [do what].”

[do what] examples: thrive, succeed, learn, survive, prosper, live independently, be healthy, have a positive future, etc.

Part 3

“Let me tell you about
[first name], [story]”

story characteristics

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

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The Asking Process



In person

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Getting the Visit





**If they take
your visit,
there's an 85%
chance they'll
make a gift.**

-Jerry Panas





Dear Mr. Donor -

I hope all is well and that you're enjoying these late spring days!

My name is Chad Barger and I am the Development Director of the ABC Charity.

I am writing to see if I could stop by sometime in the next month or so to provide a **brief** update on ABC Charity. I like to do this with as many of our supporters as possible each year. It's an opportunity for me to share our progress, to answer your questions and to **get some feedback** which is always appreciated.

I think **20 minutes** would be sufficient – is there a good day on your calendar? **What about the 20th at 2pm or the 22nd between 1 and 4pm?**

Also, please know that while it is my hope that you will continue supporting our cause, at this time I'd just like to meet you and provide this update – **I will not be asking for any money!**

Thank you for

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Sincerely, Cha



Different Approaches for Different Relationships

- A close friend
- An acquaintance
- Someone you don't know
(insert the connection)

But what if they
say no?

Or never return my
emails & calls?



**POSITIVE
ENGAGEMENT**

Guiding the Conversation



My thesis is
Story...

listen more
talk less



DEFAULT “LISTENING” BEHAVIOR

45% = What Am I Going to Say Next?

45% = When Can I Politely Cut In?

10% = Actually Listening

the most powerful form
of communicating with
another human being is
asking them a question

*Ask
open-ended
questions*





FIND CPI

(common points of interest)

Small talk

KNOW | LIKE | TRUST

The Transition



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?

A FEW

key talking points

What
can I do
to help?



Positioning the Ask



no asks on
first visits with
people you don't
already know well

The easiest way to
make an ASK ...

CONSIDER

&

JOIN ME

“I hope you’ll
CONSIDER JOINING
ME in supporting this
program with a
donation of \$5,000.”

“I hope you’ll
CONSIDER JOINING
ME in advancing this
program by serving on
the task force.”



Closing the Meeting





Small talk

KNOW | LIKE | TRUST

GET
PERMISSION

What's Next?

- ① More information
- ② Proposal / offer
- ③ Follow up call / meeting



**GET
PERMISSION
AT THE
MEETING**

Following Up



But what do you need to
do before you follow up
with your planned next
step?



Thank you ...

The 3 Minute / 3 Sentence Thank You Note Formula

sentence 1 = what you saw / what happened

sentence 2 = the impact of what you saw on
you or your organization

sentence 3 = what you appreciate about the
person's role in what you saw

VANCE -

THANKS AGAIN FOR TALKING
THIS TIME TO MEET WITH
ME THIS WEEK. I'M CONFIDENT
THAT BY WORKING TOGETHER WE
CAN BOTH INCREASE OUR IMPACT
ON THE LOCAL ARTS SCENE. I
GREATLY APPRECIATE YOUR
DEDICATION TO
THE CAUSE! ♡

THANKS AGAIN,
CHAD

Follow up guidelines: 4x

1 week after the ask

2 weeks after that

4 weeks after that

8 weeks after that

Move on (after 15 weeks)

Donor Retention – The Effective Board's Calling



the pyramid

WE HAVE
TO RETAIN
THEM



43.6%

Fundraising Effectiveness Project (FEP), Q4 2020

RETENTION >
ACQUISITION

People give to folks that
they KNOW, like and trust

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

What's the secret?

#donorlove



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The 3 most effective
things you can do as a
board member to boost
donor retention ...



What would
you say?



What would
you say?

call script

Hi (donor's name).

I'm _____ (your name) from _____ (charity).

I'm calling today to thank you for your recent donation. It means so much and we wanted to tell you personally how grateful we are.

[pause]

If you have just a few seconds, I'd love to know what prompted your gift?

[pause]

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Thank you _____ we have a wonderful day!



Thank you ...

One last thing ...



“What can I
do to help you
with _____?”



The End!

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fundraising coaching
board training
productivity coaching
online fundraising certificate
capital campaign support
keynotes & workshops
(in person & online)

further learning

@fundraiserchad



questions

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