

Boris Frank Associates

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WELCOME TO

SUCCESSFUL FUNDRAISING

A Division of

BORIS FRANK ASSOCIATES

CREATIVE COMMUNITY FUNDRAISING

THE ROAD TO SUSTAINABILITY

Serving Not-For-Profit Organizations Since 1982

INTRODUCTION

The challenge – survival

Role of the Board

Role of the staff

Getting ready

- First...**a strategic plan**
- Then...**a development plan**
- Consult with others
- Diversify the funding base
- Cost effectiveness
- Make sure the “house is in order”
- The “elevator speech”

People give to people

CURRENT FUNDRAISING CLIMATE

Foundations

Corporations

Government

THE KEYS TO SUCCESS

- Relationships
- Cultivation
- A new course; an old approach
 - Recapturing the personal touch
 - A long range perspective

The great “Marketing Principle”

Applying marketing principles

- Differentiation
- Segmentation
- Tailoring

GET HELP

“People give to people”

Inside

Outside

Fundraising ‘committee’

Associate with success; trust; credibility

Attracting the best

Endorsers

Consultants

THANKING THE DONOR

The personal approach

Donor empowerment and control - donor direction

Individuals

HOW TO ASK

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ASKING FOR THE GIFT

Here are some basic and creative principles that can make the task easier and more rewarding.

FUNDRAISING PRINCIPLES

- * It's all about **relationships**
- * Lead and pacesetter gifts will have a tendency to determine the pattern and levels of giving for the entire campaign
- * The "quiet phase" of most campaigns is critical...it sets the standards for the balance of the campaign

ASKING FOR THE GIFT

- * Review the campaign materials, goals and objectives...the "case"
- * Make your own personal pledge
- * Select prospects where you have a special, strong relationship
- * Evaluate the prospect. Determine a solicitation strategy. Set a target goal for the prospect. Consult with others
- * Set a time for a personal, face to face meeting with the prospect
 - Select place where prospect is comfortable; or meet at the project site
 - Advance letter
 - Possible team approach; it is normal at first to be uncomfortable...
accompany someone with experience
- * Prepare a tailored packet of materials for each prospect
 - Request special materials, if needed

- * Contact best prospect first. Success, no matter what the amount, will make you feel better
- * Focus on prospect. Benefits to them, their firm, family, profession, community

Determine donor needs, interests. Avoid just statements. Encourage the prospect to talk about his or her interests. This is marketing, not sales

Major donors support visions, dreams, opportunities; not "projects"

Focus on value, not taxes

Heart, not head

"Investment," not donation; "opportunity"

- * Take your time. It usually takes more than one call to obtain a sizable and thoughtful pledge. Cultivate
- * Mention success of the campaign so far; that they will be joining others. Donors like to be part of success

We will keep you informed - internal newsletter

- * Discuss methods of giving

How to pledge

In-Kind donations

Benefits of giving appreciated stock and property

Matching. (They should check with their employer to see if they have a matching program)

- * Discuss recognition opportunities; family recognition
- * Answer questions and concerns. Offer to get answers

How to ask

- * Be ready with the target amount if asked by prospect. Place goal at lower end of a range
- * Ask for the gift or pledge. You should be able to sense when it's time to ask. **But be sure to ask**. The biggest reason people don't give...they weren't asked... appropriately

"Would you consider..." is a great way to start the ask

After ask...be quiet! LISTEN!

They will either say "yes", "no", or "I need time to think it over"

"No" usually means "not now." Ask if you should contact later.
Determine a follow-up date

If they will be consulting with others or need time to think it over,
set time for follow up

- * Send a personal, handwritten thank-you note...whether they pledged or not
- * Be alert for possible additional donors. Before contacting, check with campaign office to make sure they are not assigned to another volunteer

BE POSITIVE

THINK BIG

FOLLOW THROUGH

ASK FOR THOUGHTFUL AND GENEROUS PLEDGES

and

THANKS FOR VOLUNTEERING

FUNDRAISING LANGUAGE**WORDS TO AVOID**

WE NEED

SHOULD

OUGHT TO

OWE US

TAX BENEFIT

OBLIGATION

“HIT UP”

“DEEP POCKETS”

“LOW HANGING FRUIT”

WORDS TO USE

GIFT

DONATION

CONSIDER

IMPACT

HOPE

MEANINGFUL

EXCITING

INVEST IN

PASSION

SUSTAINING

ENDURING

MAKE A DIFFERENCE

WHAT DO YOU THINK?

THANK YOU