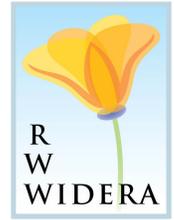


FROM MEMBER TO MAJOR GIFT

RWWidera Consulting

Park Partner Revenue Strategies – Earned Income vs. Fundraising



Earned Income

- Programs / tours
- Sales
- Contract Operations

Point of Sale Fundraising

- Membership
- Events
- Raffles

Fundraising

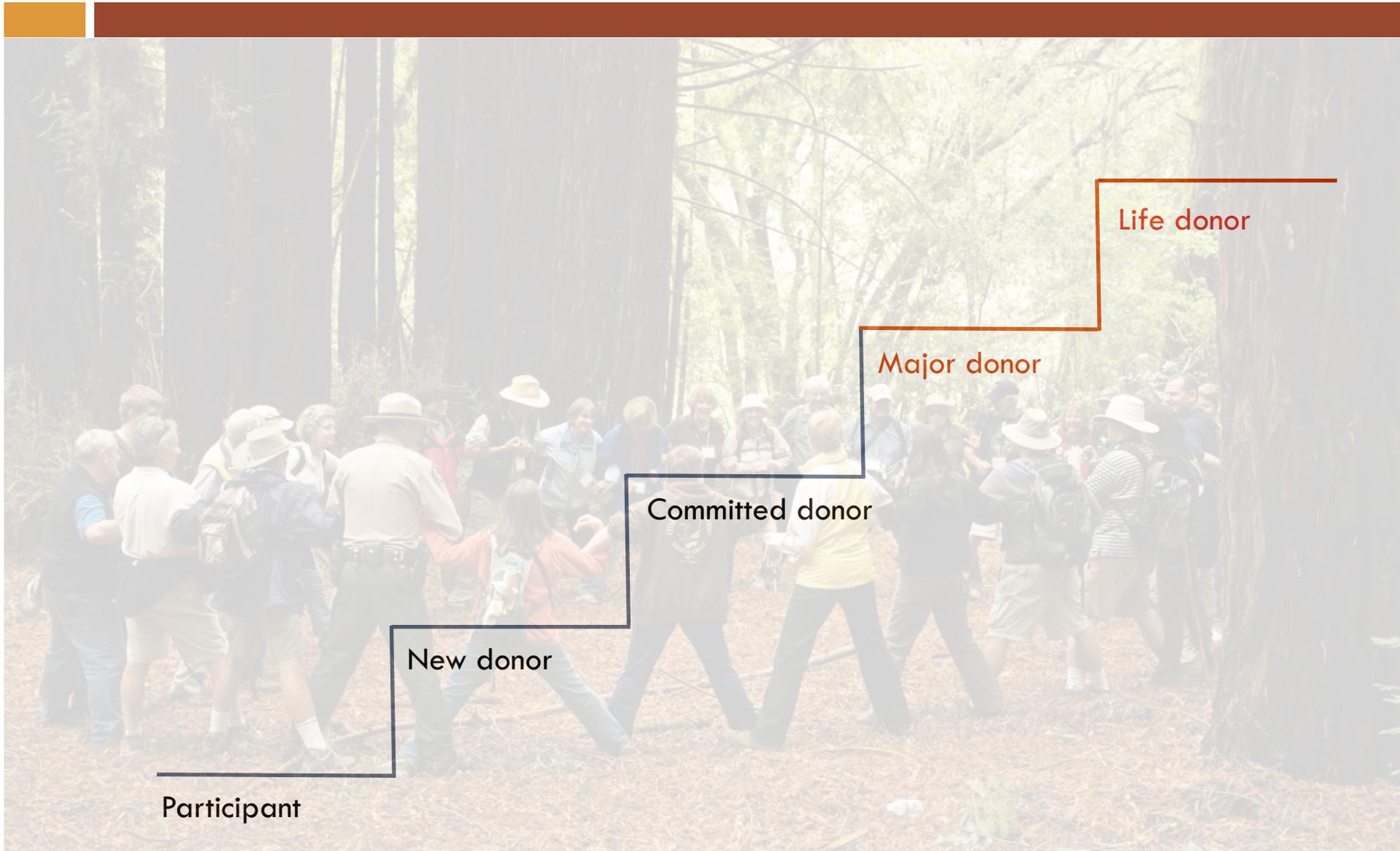
- Signature Event
- Grants
- Major Gifts / Campaigns
- Legacy Giving

General characters of fundraising strategies



	Restricted	Board Involvement	Return on investment
Membership	no	Yes	Low
Events	no	Yes	Low
Raffles	no	Yes	Low
Signature Event	no	Yes	Medium to high
Grants	yes	Yes	Medium to high
Major Gift	Yes or No	Yes	Medium to high
Legacy Gift	Yes or No	Yes	High

Build relationships by knowing your path together.



Participant

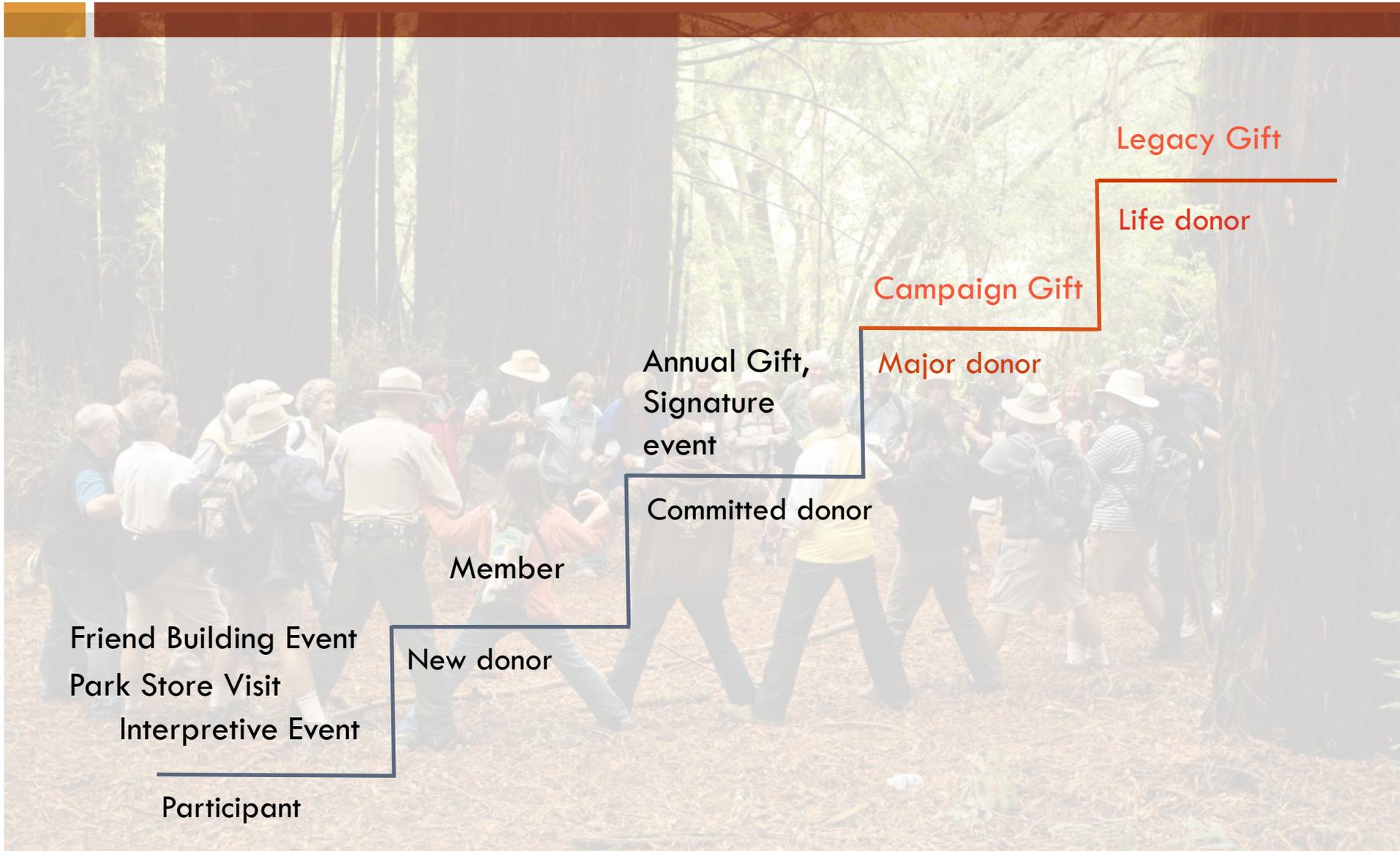
New donor

Committed donor

Major donor

Life donor

Keeping donors engaged by understanding what they value.



Legacy Gift

Life donor

Campaign Gift

Major donor

Annual Gift,
Signature
event

Committed donor

Member

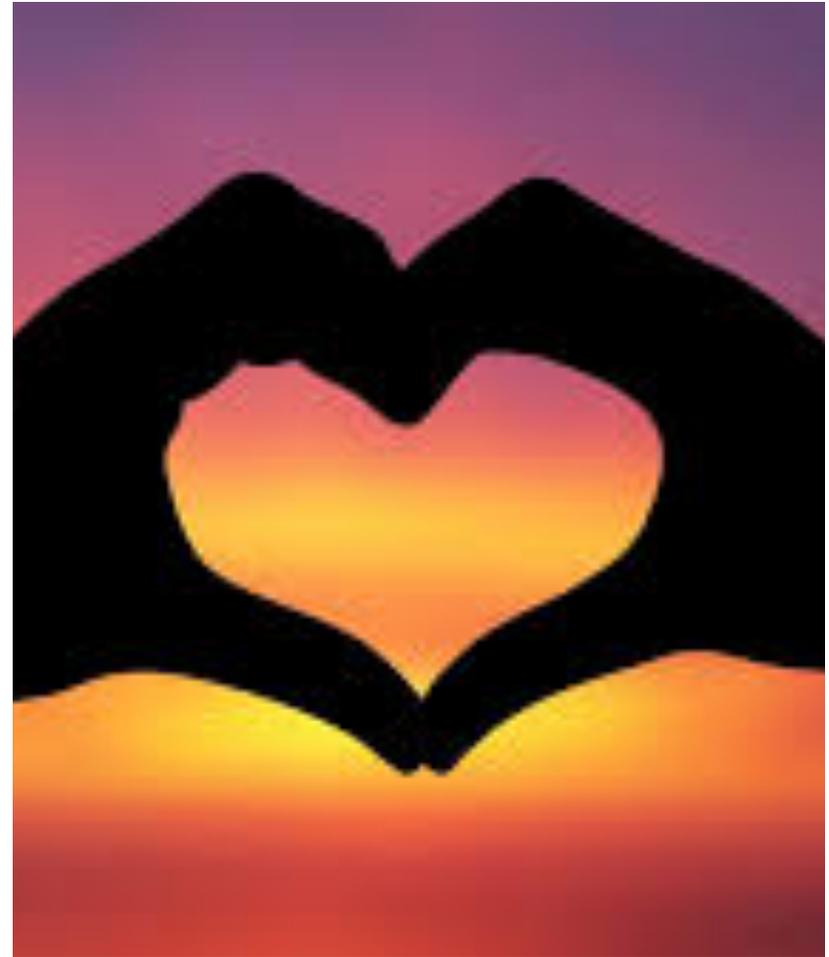
New donor

Friend Building Event
Park Store Visit
Interpretive Event

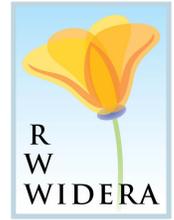
Participant

Good Fundraising is Donor Centered

- Shares your organizations values
- Has had a profound experience with your mission
- Is connected with someone within your organizations leadership
- Wants to know that their gift will make a difference

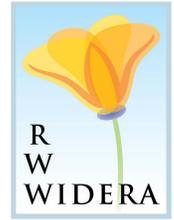


Fundraising, unlock your potential.



- Value Proposition
- Case Statement
- Key Determinations
- Information Management
- Timeline, Resource Needs & Budget
- Prospect Analysis & Pyramid
- Moves Management
- Communications & Marketing Plan
- Donor Recognition Plan

Value Proposition



- A value proposition tells you exactly what visitor's and donors value most about your Mission and the park(s) you serve. This information needs to be solicited through surveys, one on one interviews and focus groups. It is critical to make sure that you identify all the entities that derive and add value to your park
 - ▣ Survey of visitors and donors to determine what they value about your park and mission.
 - ▣ Survey of the local community and businesses
 - ▣ Survey of park employees and volunteer
 - ▣ Survey of other regional parks and open spaces and their managers
 - ▣ Survey of other nonprofit groups with a cross over mission
 - ▣ Inventory and significance of natural and cultural features

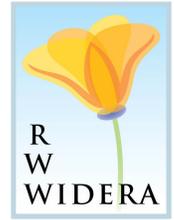
Economy of the Commons, the system of interaction and exchange of value among people and their parks.



EXERCISE:
Identify all the groups that receive value from and give value to your park(s). Define and describe those values.



How you fit in?



A value Proposition describes exactly the value that visitors, donors, stakeholders and your agency partner gain from your Mission



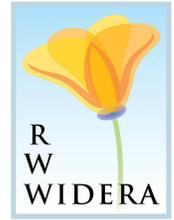
Providing Value to the park and people



Define and describe the values that your organization contributes to your park(s) and The public.



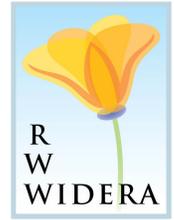
Case Statement, What is your story?



- A case statement is a document that provides the rationale and justification of a fundraising effort. It can make a case for a specific program or project, or it can advocate for general operating support. It focuses on a dilemma that needs to be fixed and explains the organization's proposed resolution.
 - ▣ Who are you? & What is your track record?
 - ▣ What are you trying to do?
 - ▣ What purpose does this serve?
 - ▣ Who will benefit?
 - ▣ Why now? & What is the consequence of this not happening?
 - ▣ The Case Statement becomes your base document that is “repurposed” for all internal and external communications.
 - ▣ The Case Statement is a “Living Document” and should be continuously updated.

Key Determinations

Once this, then...



Once this...

- Once the project is approved....
- Once the Interpretive Plan is completed...
- Once we have built capacity here...

...then this.

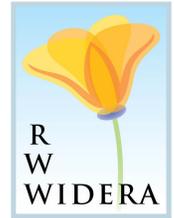
- then we can begin to fundraise.
- then we can prioritize the project we want to fund.
- then we can begin planning for this.



Information Management

- Confidentiality is number one and always a priority.
 - ▣ Policies and procedures
- How you setup your database determines how useful it will be.
 - ▣ Double the amount of time you think it will take to set up and use your database.
 - ▣ Selecting a donor database; donor management vs. prospecting
- Using outside support
 - ▣ Consultants
 - ▣ Online resources
- Move from record keeping to prospecting.
 - ▣ How to think like your in sales

Timeline, Resource Needs & Budget



Expense

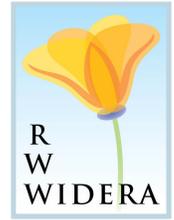
- Staff time & travel
- Collateral – mail, web, social media
- Supplies
- Event(s)
- Volunteer support & management
- Indirect – administration, accounting, etc...
- Donor recognition and inducements

Income

- In-Kind services & supplies
- Ticket sales
- Major Gifts
- Grants
- Sponsors
- Online giving
- Individual solicitation response
- Other _____
- Other _____

Model Fundraising Budget - Campaign

Expense	Total	January	February	March	April	May	June	July	August	September	October	November	December
Staffing (Sal & Ben)													
Executive Director (.25 FTE)	\$24,000	2000	2000	2000	2000	2000	2000	2000	2000	2000	2000	2000	2000
Fundraising Professional (.5 FTE)	\$31,800	2650	2650	2650	2650	2650	2650	2650	2650	2650	2650	2650	2650
Development Assistant (.5 FTE)	\$14,400	1200	1200	1200	1200	1200	1200	1200	1200	1200	1200	1200	1200
Travel	\$1,200	100	100	100	100	100	100	100	100	100	100	100	100
Staffing Total	\$71,400	3950	3950	3950	3950	3950	3950	3950	3950	3950	3950	3950	3950
Collateral & Events													
Website	\$2,400	200	200	200	200	200	200	200	200	200	200	200	200
Email Marketing	\$180	15	15	15	15	15	15	15	15	15	15	15	15
Major Donor Packet	\$500		500										
Free Standing Display	\$500		500										
In-Kind Donor Packet	\$1,000	500	500										
Appeal Letter 1 - 5	\$3,750							750	750	750	750	750	
Leadership Council House Parties	\$2,700			300	300	300	300	300	300	300	300	300	
Major Event	\$4,200			300	400	500	1000	2000					
Outreach	\$3,000	250	250	250	250	250	250	250	250	250	250	250	250
Collateral Total	\$18,230	965	1965	1065	1165	1265	1765	3515	1515	1515	1515	1515	465
Donor / Volunteer Recognition													
Plaque	\$1,000										1000		
Recognition Events	\$2,000							1000					1000
Donor visits	\$1,200	100	100	100	100	100	100	100	100	100	100	100	100
Thank You Packet	\$900				100	100	100	100	100	100	100	100	100
Donor Rec Total	\$5,100	100	100	100	200	200	200	1200	200	200	1200	200	1200
Total Expense	\$94,730	5015	6015	5115	5315	5415	5915	8665	5665	5665	6665	5665	5615
Income													
In-Kind Materials	\$60,000	5000	5000	5000	5000	5000	5000	5000	5000	5000	5000	5000	5000
In-Kind Volunteers	\$120,000	10000	10000	10000	10000	10000	10000	10000	10000	10000	10000	10000	10000
Total In-Kind	\$180,000												
Major Gifts and Appeals													
Gifts	\$223,000	8000	5000	5000	5000	5000	5000	5000	5000	5000	25000	50000	100000
Lead Gift	\$25,000		25000										
Appeals	\$18,000							2000	2000	3000	4000	5000	2000
Board Giving	\$50,000			50000									
Total Major Gifts and Appeals	\$316,000												
Major Event													
Tickets	\$10,000						10000						
Auction	\$20,000							20000					
Total Event(s)	\$30,000												
Grants													
Community Foundation	\$25,000					25000							
Foundation #2	\$20,000							20000					
Foundation # 3	\$25,000											25000	
Total Grants	\$70,000												
Total	\$596,000	23000	45000	70000	20000	45000	30000	62000	22000	23000	44000	95000	117000
Net Funds	\$501,270	\$17,985	\$38,985	\$64,885	\$14,685	\$39,585	\$24,085	\$53,335	\$16,335	\$17,335	\$37,335	\$89,335	\$111,385
Net Funds W/O In-kind	\$321,270	\$2,985	\$23,985	\$49,885	-\$315	\$24,585	\$9,085	\$38,335	\$1,335	\$2,335	\$22,335	\$74,335	\$96,385



Prospect Analysis & Pyramid

- Get your data in order.
- Three prospects = one gift.
- ID gift range for each prospects.
- ID dollars that can be raised from known prospects.
- Need a min of 50% of the dollars identified before moving forward – 80% would be ideal.
- Define cultivation goals
- Identify and cultivate a “Leadership Team”
- Strategy evaluation
- 80% of the funds will come for 20% of the donors.

Prospect Analysis & Pyramid



Program	Potential Funds Needed
	\$60,000
	\$16,200
	\$10,000
Total FR	\$86,200

Level	Gifts Needed	Gift amount	Prospects needed = 3 times the gifts needed	Prospects Identified from current donor base.	Dollars that could be raised from current donor base	Prospects that we need to cultivate	Dollars that could be raised with added donor cultivation
1	1	\$10,000	3	3	\$10,000	0	\$10,000
2	3	\$5,000	9	7	\$11,667	2	\$15,000
3	5	\$1,000	15	5	\$1,667	10	\$5,000
4	10	\$500	30	16	\$2,667	14	\$5,000
5	15	\$250	45	22	\$1,833	23	\$3,750
6	20	\$100	60	19	\$633	41	\$2,000
7	40	\$50	120	244	\$4,067	0	\$2,000
8	60	\$20	180	546	\$3,640	0	\$1,200
Totals	154		462	862	\$36,173	90	\$43,950



Assumptions:

- 1) Current donors will match their annual contribution total when donating to a special campaign
- 2) We need to have three prospects for each individual donation needed
- 3) Due to the timing of this FR campaign it will take donors away from our spring appeal.

Actual funds to be raised varies depending on:

- 1) First round of conversations with prospects \$1,000 +
- 2) Board individual giving levels
- 3) Effectiveness of prospect cultivation & laddering up current prospects

Proposed next steps:

- 1) Meetings with prospects \$1,000 +
- 2) Board members decide on their own giving & getting goals
- 3) Board, staff and prospects identify new prospects
- 4) Update feasibility review & create plan outline (schedule of appeals & events)
- 5) Set Campaign Goal - Board approves goal & plan outline (Feb 2010 Board meeting).
- 6) Raise funds - (March - June 2010)

Moves Management



Prospect Research: Name, target gift, giving history,
Leadership prospect, motivation, how like to give

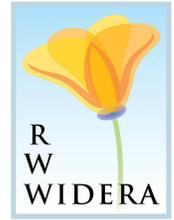
Value alignment Identified, dossier completed

First meeting – present case, listen to values.

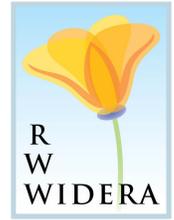
Second Meeting – Present Ask

Present Recognition

Communications & Marketing Plan



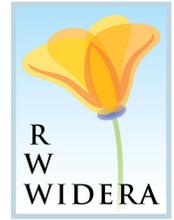
- Case Statement & Talking Points
- Collateral design & Campaign Brand.
- Schedule for end-of-year giving
- “Free” marketing, PSA & PR – Media Packet. Media Sponsorships. Paid Media.
- Social Media plan & schedule.
- Image Bank



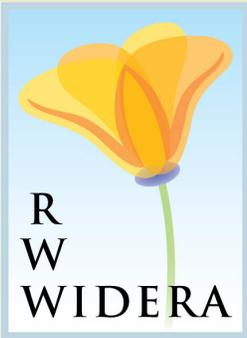
Elements of a Donor Recognition Plan

- Case Statement
- Joint Mission Statements
- Project / Program Summary
- Donor Recognition Policies & Practices
- Donation levels
 - ▣ Description
 - ▣ Donation Amount / Range
 - ▣ CSP Guideline Reference & Responsibility
- Site Map / Image
- Approval Letter(s)

Resources



- You local Community Foundation
- <http://www.blueavocado.org/>
- <http://www.kleinandroth.com/kim-klein/>
- <http://philanthropy.com/section/Home/172/>
- <http://www.ssireview.org/> (Stanford Social Innovation Review)
- <http://www.cygresearch.com/index.php> (Donor Centered Fundraising)



Final Word – The Best Fundraisers are...

No one has ever become poor by giving.
–Anne Frank

RWWidera Consulting