Foundations of Fund Raising

A Crash Course on the Basics of Raising Money

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Money is congealed energy and releasing it releases life’s possibilities.

- Joseph Campbell

Fundraising is the gentle art of teaching the joy of giving.

- Hank Rosso
What is **Fundraising**

• First word that comes to mind!
…Not just asking for money…

FR is a set of strategies carried out continuously and systematically:

- to bring resources to your agency
- to build long-term relationships
Fund Raising Terms to Know and Use with Ease!

- Annual fund
- Operating support
- Unrestricted gift
- Program Support
- Restricted Gift
- Capital Campaign
- Endowment
- Bequest
- Planned Gift
- Challenge Grant
- Matching Grant
- Major Gift
Pyramid of Giving

donors who care. a lot.

donors who care. a little.

donors who don’t care. yet.
WHY?

(hint: You don’t exist to raise $$. Why are you in business?)
Learn.....

• TED Talk with Simon Sinek
  • https://www.ted.com/talks/simon_sinek_how_great_leaders_inspire_action
To raise funds, we must have...

VISION

• What is our vision?

• What would we like healthcare for Virginia’s children to become so that the need for FAMIS would disappear?

• (This articulates the future: what will the world look like if there are NO barriers to our work?)
To raise funds, we must have...

MISSION

• What is our Mission?

• What specifically are we going to do to work toward that vision?

• (What does this agency do right now? What is its essence, purpose?)
Values:

• How do you want to act, consistent with mission, along the path to achieve our vision?
• i.e., integrity, honesty, openness, creativity, excellence, cooperation, etc.
To raise funds, we must have…

Strategic Plan

How will we convert our vision and mission into time limited goals and objectives?
Strategic Plan

• Absolutely key to have one!
• Working document of your organization that lays out specific goals, outcomes, objectives, timetables and benchmarks.
• Reflects intentional, creative planning
• SWOT analysis
• 4-6 months, NOT a weekend!
• Emerge with a set of BHAGs
SP Cont’d…. 

- Henry Ford: “If you don’t plan for your future, you won’t have one.
- If you fail to plan, then plan to fail.
- Walt Disney: It’s kind of fun to do the impossible…. 
To raise funds, we must have…

**Development Plan and Time Line**

- What are our capital, operating and program expenses?
- Where/when/how will we get the funds?
- Who will do the work?
- Recommended reading: “Creating a Fund Development Plan that Produces Ownership and Results” at simonejoyaux.com
Organizational Goals

• How much more?
• How many more face-to-face calls
• How will you “touch” your donors this year?
• What are your BHAGs
How Much Money are you Raising?
Class Exercise:

“What if we disappeared tonight?”
Think like a Buddhist…. 

…Sell Like A Rock Star
• People like to buy; they don’t like to be sold

• People buy what they need from those who understand what they want

• People buy with their hearts and justify it with their minds
Storytelling!

“Every time someone donates to a good cause, they’re buying a story that is worth more than the amount they donated.”

- Seth Godin
Elevator Pitch
At its heart, fundraising is about relationships.
So……..

Between now and June 30, what is ONE thing you are willing to do from the 6 Rs Cycle that will help get you to your agency’s goal?
Development = Relationships

- The number one rule about fund raising is: people give to people.
- To get the gift, to keep the gift, to get the gift repeated is all about the relationship.
- Fundraising is relational, NOT transactional
Fundraising Basics

• People give to people…because they want to and because they are asked!

• People give to opportunities and success -- not distress

• FR is a process, NOT an event
Dramatic Change in the non-profit sector:

- Attitude of donors
- Role of donors
- Role of non-profits
Becoming More Sophisticated…

- Panic reactions to deficits
- Limited, short-term objectives
- Stop gap measures
- Negotiate from weakness
- “Help,” “Need,” “Assist”
- Car washes, bazaars, candy drives
- Commitment by CEO and board to raise $$$
- Strategic planning
- Sound business mgt.
- Negotiate from strength
- “Investment,” “Goals,” “Vision”
- Proposals to fdns., corps., endowments, annual funds, bequests.
Increased scrutiny of non-profits

- Political scrutiny to ensure no agendas (post-9/11 world)
- Fallout from Enron, WorldCom and Congress’s reaction
- Availability of info on the internet.
Organized Office

Organized and efficient = effective
Can’t go out on appointments if you don’t know who you are going to or what you will say when you get there.
Budget
• How much do your programs cost
• How much are you responsible for raising for each program?
• How much do you expect to spend on FR?
Programs

- Mission driven (and of course reflect MVV)
- Staff available to carry them out
- Partnering with others?
- Evaluation components in place
- Outcomes CLEAR
- Do you have the passion?
An Awesome Team: 
Board, Staff, Volunteers

- Offer people opportunities to do great things
- Challenge and inspire them
- Involve them in activities that make life better now and in future generations
The Board

- Legally responsible for financial health of the organization.
- Keep the org on mission
- Must support the organization with cash gift each year.
Volunteers

- Essential ingredient in the FR mix.
- Each well-trained volunteer becomes an effective advocate for you
- Development officer cannot do this job alone, must have volunteer resources
- Create opportunities for FUN as well as work
- Include volunteers in all your events
- Say thank you
- Have training sessions, make them comfortable in this role
Cultivating Future Leaders

“Volunteer leadership development is about the most important thing an organization does. If you are not developing leaders, then you are not building the organization.”

(Bobo, Kendall, & Max, Organizing for Social Change, 1996)
The rule used to be: say thank you seven times.

Now: say thank you once and tell them what you did with the $$ six other times.

This applies to volunteers and donors.
DONOR RECOGNITION/ANNUAL REPORTS

- Very impt to provide written record of who supports you
- Respect requests for anonymity
- Another opportunity to remind people who you are, what you do, who you serve.
- Gift clubs
Good Luck...

Do all the good you can,
By all the means you can,
In all the ways you can,
In all the places you can,
At all the times you can,
To all the people you can,
For as long as you ever can.

(John Wesley)