




# Fundraising and Donor Engagement Workshop

November 3, 2023



# Agenda

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|---------------|--|
| 10:00 - 10:20 | Welcome & Introductions                |
| 10:20 - 10:50 | Balancing Various Types of Fundraising |
| 10:50 - 11:00 | Break                                  |
| 11:00 - 12:00 | Donor Stewardship                      |
| 12:00 - 12:20 | Break/Grab Lunch                       |
| 12:20 - 1:15  | Engaging Board Members                 |
| 1:15 - 1:45   | Q&A                                    |
| 1:45 - 2:00   | Wrap & Closing Reflection              |
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# Objectives

- Understand the various types of fundraising, when to deploy them, and best practices in the field
- Gain insights into donor stewardship and engagement practices
- Consider ways to engage boards in meaningful fundraising efforts
- Meet and learn with and from your colleagues



# Group Norms

- Take space, make space
- Stay present
- Be curious – there are no silly questions!
- Confidentiality





# Fundraising Types

Annual Fund

Capital Campaigns

Special Campaigns

Planned Giving

Major Gifts

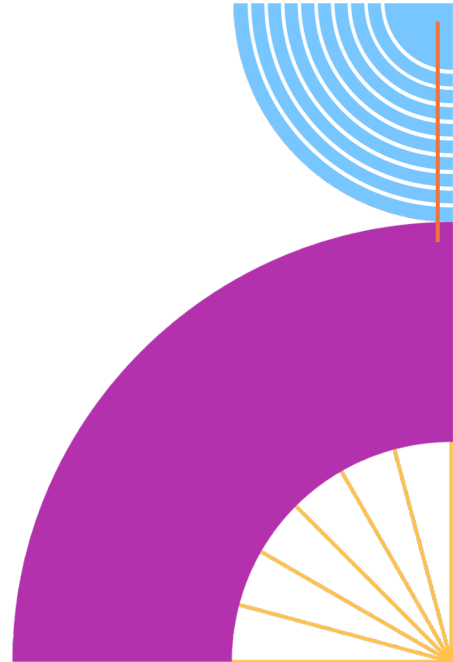
# First things first...

## What are your fundraising goals?:

- Annual expenses
- Future growth plans
- Infrastructure investments
- Operating reserves
- Large investment needs

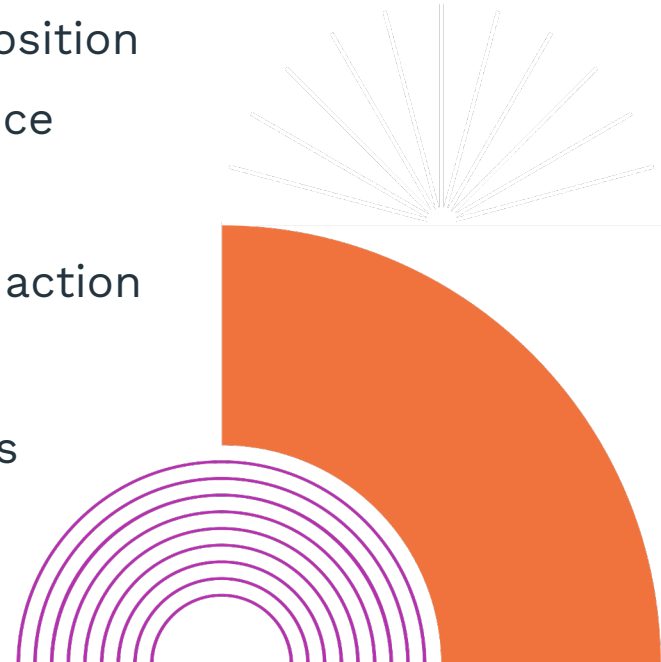
## What does the budget narrative tell you?

- To what end you are fundraising (connection to mission)
- Funding goals
- Large drivers of the budget
- Supports creation of your messaging



# Key Messaging

- **Concise:** short, easy to digest statements
- **Strategic:** define your purpose and value proposition
- **Relevant:** communicate only what your audience most needs to know
- **Compelling:** meaningful information to inspire action
- **Simple:** easy to understand
- **Memorable:** easy to recall and repeat to others



# Balancing Act

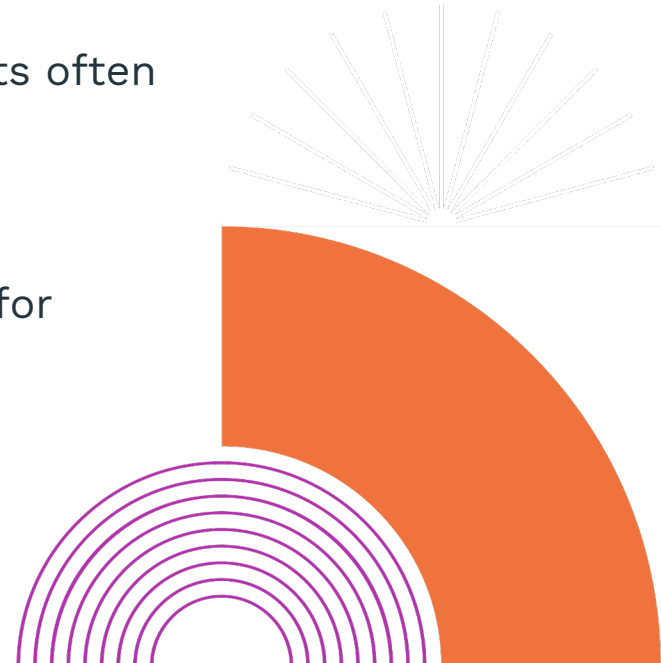
- Strong fundraising is comprehensive fundraising
- Always annual, always major gifts
- Not zero-sum with capital, planned giving, or special projects





# But, how?

- People who care enough to give to special campaigns, care enough to to sustain the organization
- Donors who can make large special campaign gifts often see those gifts separate from annual campaign
- Transparency is king
- More visibility, more connections points, is good for relationships which is good for fundraising
- The integrated ask





# Making the Ask

No right way but some best practices...

## **Be prepared. Do your homework!**

Understand the interests, capacity, and preferences of your prospect.

## **Clearly explain how a gift supports your work.**

Be specific, tailor your ask, be prepared for a no.

## **Follow up, follow up, follow up.**

Express gratitude, follow-up, engage donors after the ask and throughout the year(s).

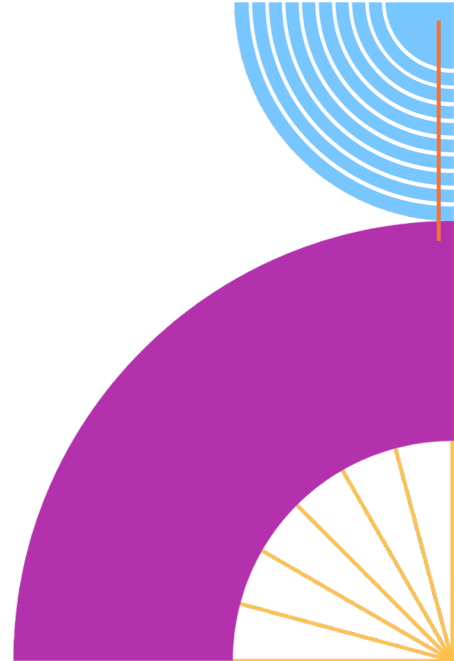
# Donor Segmentation

- Recency
- Frequency
- Type
- Amount
- Reason
- Interest



# Targeted Messaging

- What does this donor segment care about?
- How do we know?
- What social causes are they working to solve, or motivated to be a part of?
- What aspects of your work might appeal to this group?
- If you had 5 minutes to sit with this prospective donor, what would you tell them about the organization?





# Small Group Discussion





Pick one segment of your organization's existing or potential donor population that you haven't focused targeted messaging around yet.

In your small group, share what you know about this group and how it might inform how you message/approach them in the future?

What are their interests?

Why should they care about your organizations?

What would you tell them to about your organization to build their interest?



# Donor Pipeline



# Donor Stewardship

Acknowledgement, recognition, and reporting

Policies, practices, systems, and steps in place for sustained relationships

Opportunities for engagement





# Small Group Discussion





Pick one of your donor segments or keep in mind a specific donor you're engaging.

## **Personal Reflection:**

How might you engage these donors in cultivation activities? How would you build the relationships? Who would hold that relationship?

## **In Small Groups:**

Shared who you picked and one activity or action you will do this year to build relationships and cultivate a donor within that segment.





Break / Grab Lunch



# Engaging Board Members

## **What stage is your organization in?**

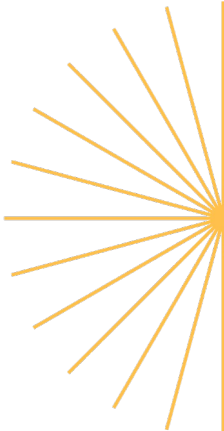
- Start-up
- Adolescent
- Mature

## **What do you need from your board?**

- All hands on deck
- Professional expertise
- Planning and oversight
- Networking and fundraising

# Shared Leadership

Board	Staff
<ul style="list-style-type: none"><li>• Personally significant gift</li><li>• Volunteer/organize events</li><li>• Make introductions</li><li>• Engage in direct asks</li><li>• Support stewardship and engagement</li></ul>	<ul style="list-style-type: none"><li>• Setting expectations</li><li>• Developing shared language, talking points</li><li>• Sharing data and impact</li><li>• Stewarding donors</li><li>• Conducting formal asks post-introduction</li></ul>







# Small Group Discussion



## **Board Members:**

- How would you like to work with your organization's staff to support fundraising efforts?
- What tools or resources might you need?
- How might you encourage and support other board members to engage in fundraising?

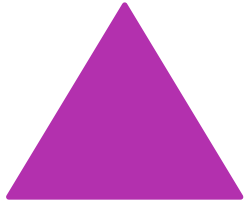
## **Staff Members:**

- How would you like to work with your organization's board to support fundraising efforts?
  - How are you currently engaging board members and what are new/additional ways of engaging them?
  - What resources do you provide and what else might support further engagement?
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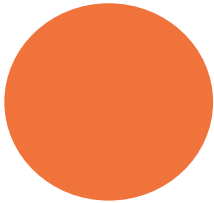


Q&A

# Reflection



What are three ideas or learnings you are walking away with today?



What is circling around your head? What are you still considering?



What feels square away for you? What feels really clear?