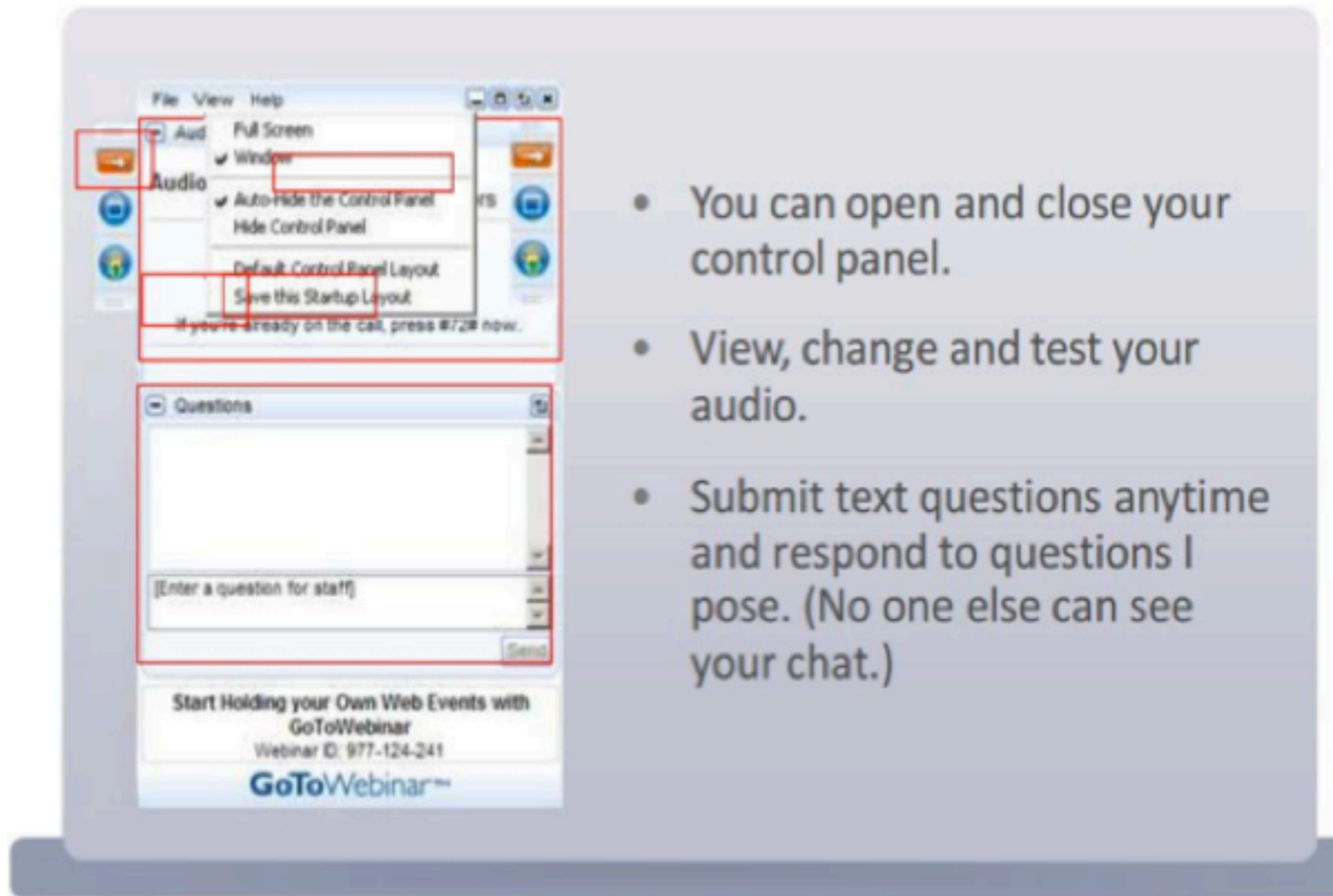


# GoToWebinar



- You can open and close your control panel.
- View, change and test your audio.
- Submit text questions anytime and respond to questions I pose. (No one else can see your chat.)

CITRIX online

GoToWebinar support phone number should you need it  
1 (800) 263-6317



How to  
Explode  
*your fundraising*  
in

**2016**

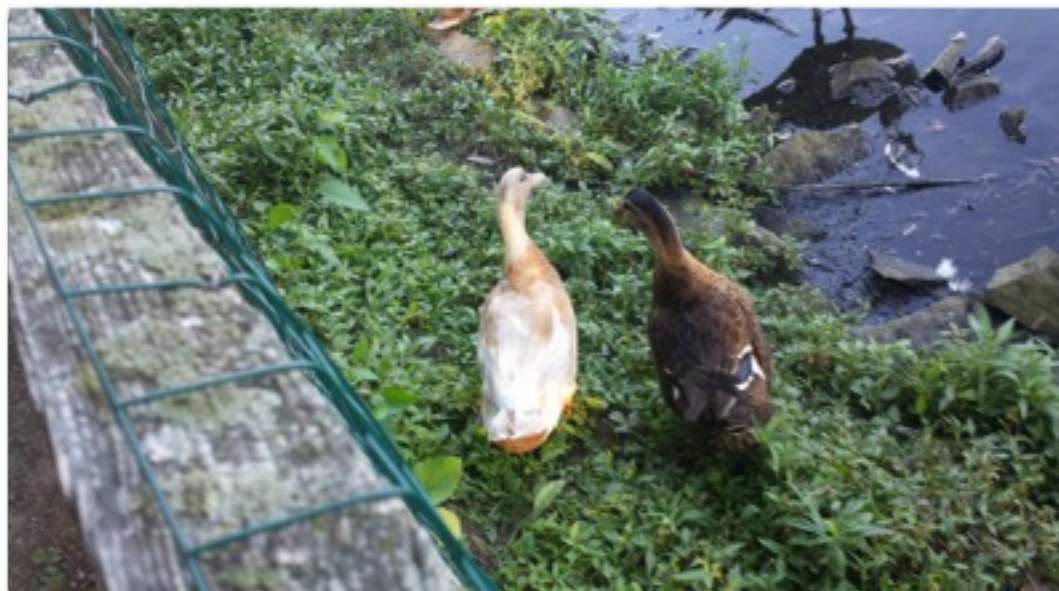
HABITS OF HIGHLY  
SUCCESSFUL  
FUNDRAISERS

*With Pamela Grow*

# ABOUT ME



# WHAT GETS ME GOING



# Does this sound like you?

- You were busier than ever last year, but you're not sure what you really accomplished.
- You didn't achieve your biggest goals. You're disappointed and you know there must be a better way.
- You had a fantastic year...but you're not sure you can do it again - *you're exhausted!*

# YOU'RE BUSY!

I am working on my BUDGET! The dreaded budget!

Lili

Hi Pamela,

I would love to try and win this book!

I work at Community Nurse Health Center, a Federally Qualified Health Center of the communications, marketing and fundraising.

This is my to-do list for this week:

- This Sunday, our organization turns 95 years old, so I am
  - Updating our branding standards to include our 95<sup>th</sup> anniversary logo
  - Ordering 95<sup>th</sup> anniversary banners for our three buildings
  - Ordering printed grocery bags that we can give out to our volunteers, patients, resale shop customers and staff
  - Designing a 95<sup>th</sup> lapel pin and getting pricing on them
- Finalizing a patient newsletter with our printer as soon as I get the address list from Medical
- Finalizing our monthly organization's e-newsletter (1 more article needed)
- Finalizing newspaper ads for our resale shop
- Speaking with our printer about an event postcard mailing, and our impact report which I hope to have sent out in April
- Finalizing fundraising reports for 2015
- I had two chamber meetings last week and am still trying to respond to people who requested sponsorship information at those meetings.

One thing that you might be interested in (that's not on this week's list) is that I'm working on finding a local florist who will partner with us and create a "Community Nurse" arrangement to sell - and we would get a cut of those sales. My goal is to have this up and running just before National Nurses Week (which is the week of Mother's Day...)

**Right this very minute.** I'm finishing my coffee, reading the last of the emails from this morning and preparing to walk into our weekly standup meeting with the 15 people who work in my building. Trying to figure out if I'm ready to tell people that my boyfriend of 5.5 years and I broke up last week, but not sure I'm ready to talk about it. I think too soon. There, one thing accomplished so far. Decision made. Gotta go.

means that we get interrupted by e-m  
frames and mattresses she needs for

Hi Pamela,

I am working on 3 things this very moment (it's hard to do these things we are doing this all at the same time):

1. Boring accounting codes which were reviewed
2. A grant application to the city of Ottawa - and trying to figure out what my co
3. Creating a weekly working plan for the team

Cheers,  
Phil

Hi Pam!

I'm working on our capital campaign for a new facility. We've just begun the "silent phase"

During our last meeting, they had mentioned the possibility of hiring someone to assess an

Thank you!!!!

# HERE'S WHAT YOU'LL LEARN TODAY

- Where philanthropic dollars really come from
- The most important fundraising lesson
- The difference between being 'busy' and being effective
- Why you must be the change
- The habits of successful fundraisers

# FAST ACTION BONUS

## How do you navigate the waters of fundraising without feeling overwhelmed and overloaded?

Today's technology has generated an abundance of information on every topic out there, and that includes fundraising. With all of the information in existence, from the do's to the don't's, to the hundreds of fundraising 'gurus,' to the published books, articles, and other media, how do you take control of your ship and steer it in the right direction?







**HOW DID YOU BECOME A FUNDRAISER?**



# IT'S ALL IN YOUR PERSPECTIVE



The only thing you sometimes have control over is perspective. You don't have control over your situation. But you have a choice about how you view it.

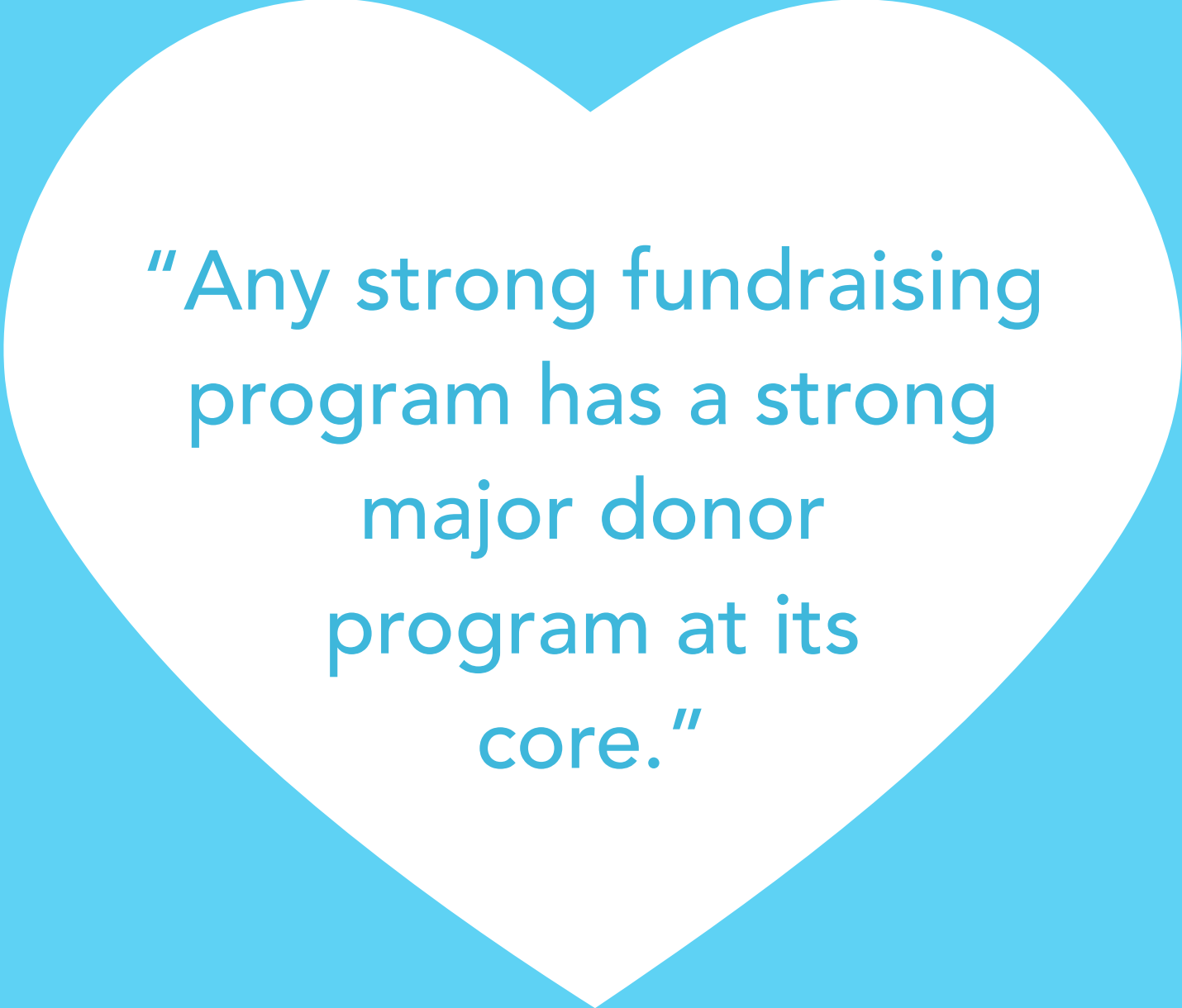
*Chris Pine*

# IS THIS YOUR BOARD?



Text

**SHOW  
ME THE  
MONEY!**



"Any strong fundraising program has a strong major donor program at its core."

# WHERE DO CHARITABLE DOLLARS COME FROM?

*really*

8%

Bequests

72%

Individuals

2015

15%

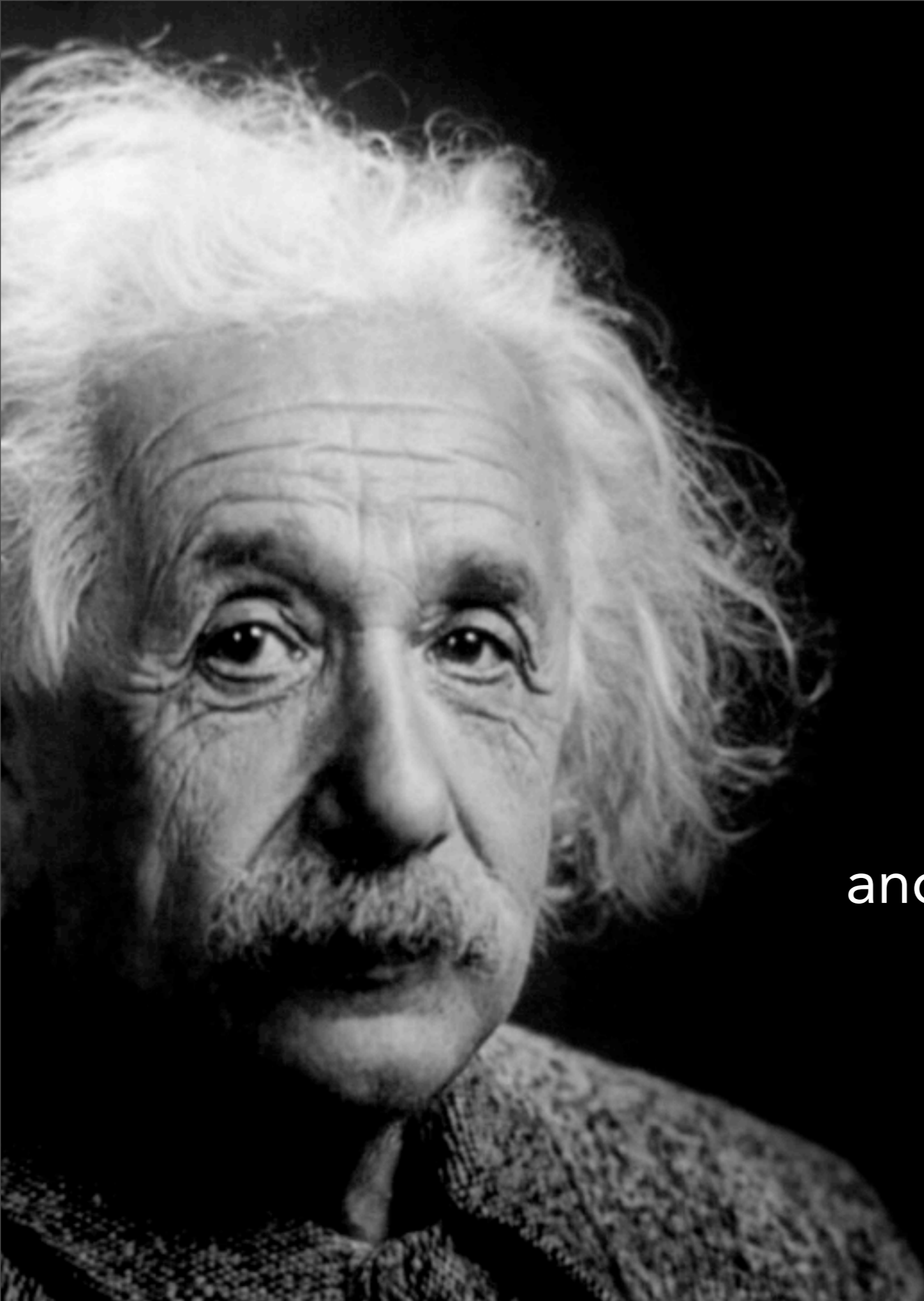
Foundations

5%

Corporations

# MOP & GLO

Floor Shine Cleaner



Insanity: doing the same  
thing over and over again  
and expecting different results.

*Albert Einstein*



# THE 'SECRET SAUCE' TO YOUR FUNDRAISING SUCCESS



Aside from your fundraising plan, you need to have a plan in place to **love your donors!**

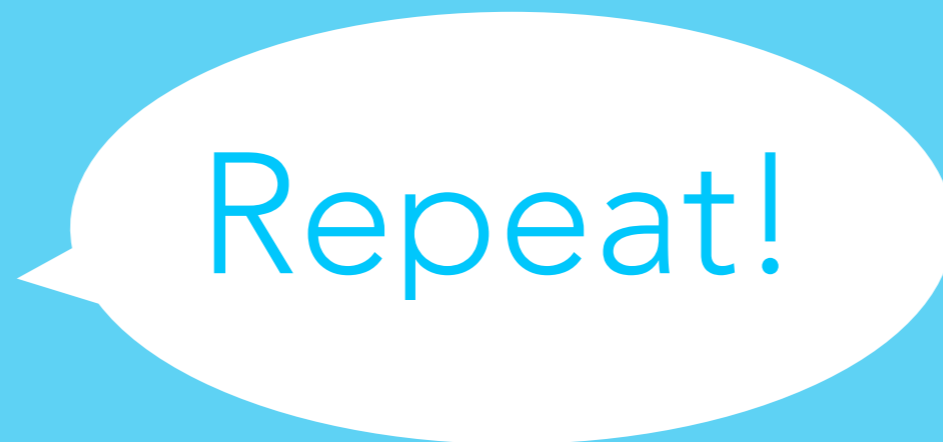


YOUR  
DONOR  
LOVE

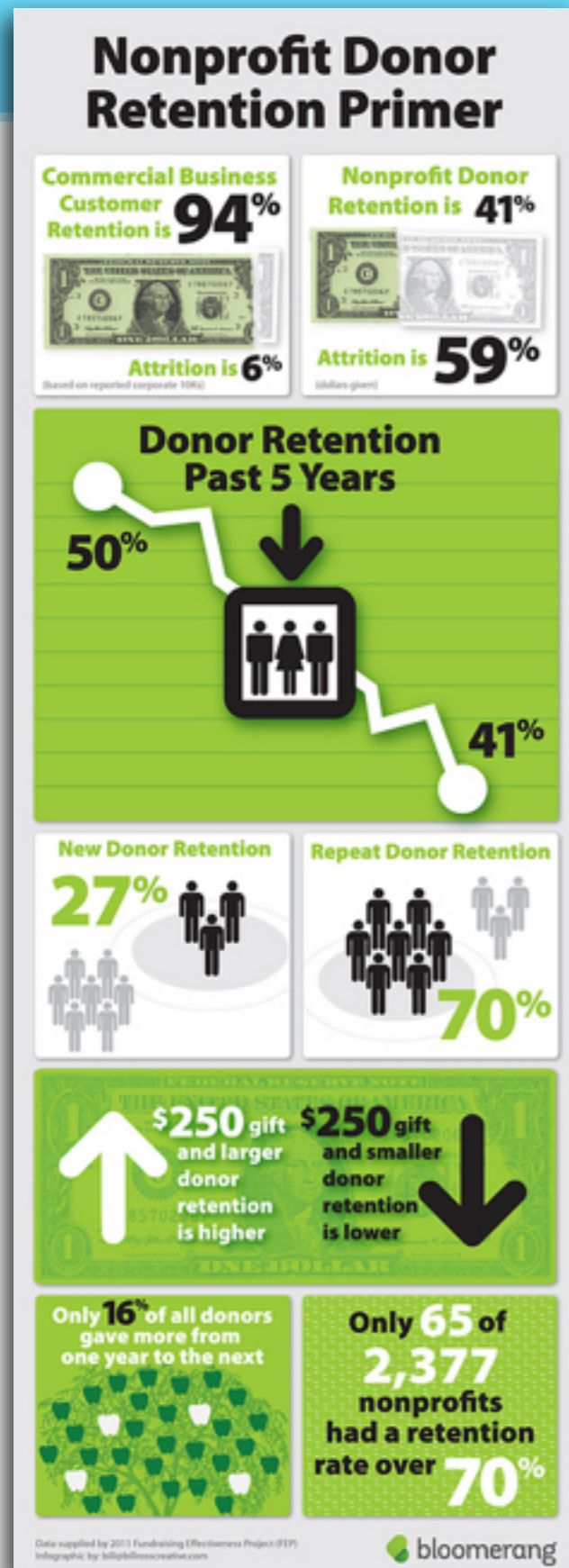
FORMULA

101

# THE FORMULA



# 1. KNOW YOUR RETENTION RATE AT ALL TIMES.

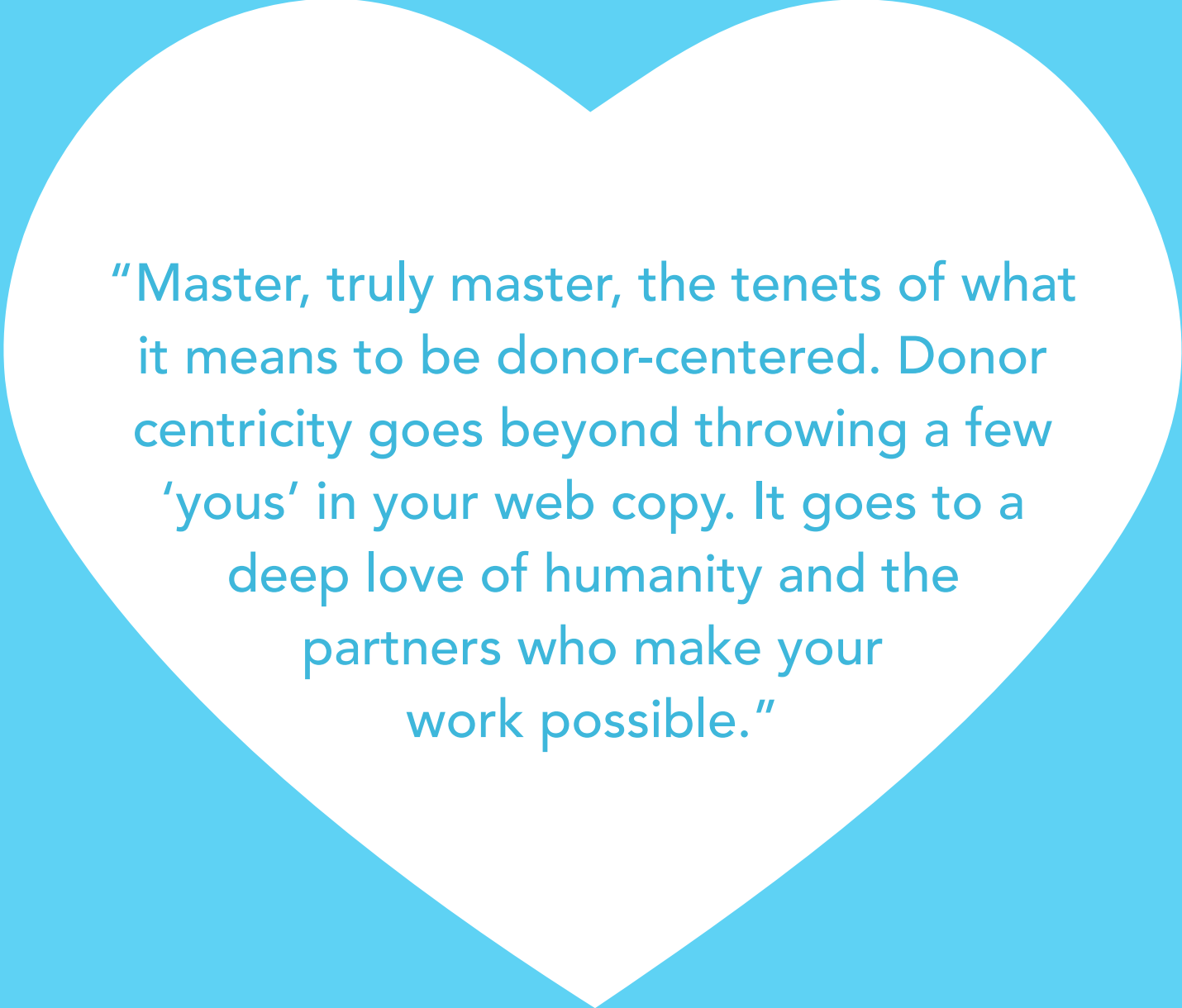


Take the total number of donors who gave in Year 1 and divide it by the total number of those donors who gave in Year 2. Multiply that number by 100 to get your retention rate as a percentage. (You can do a rolling year, e.g. June to June, but it's got to be the same for both calculations.)

Commercial  
**businesses** retain  
**94%** of their  
customers while the  
**nonprofit sector**  
retains only **41%**  
of its donors.

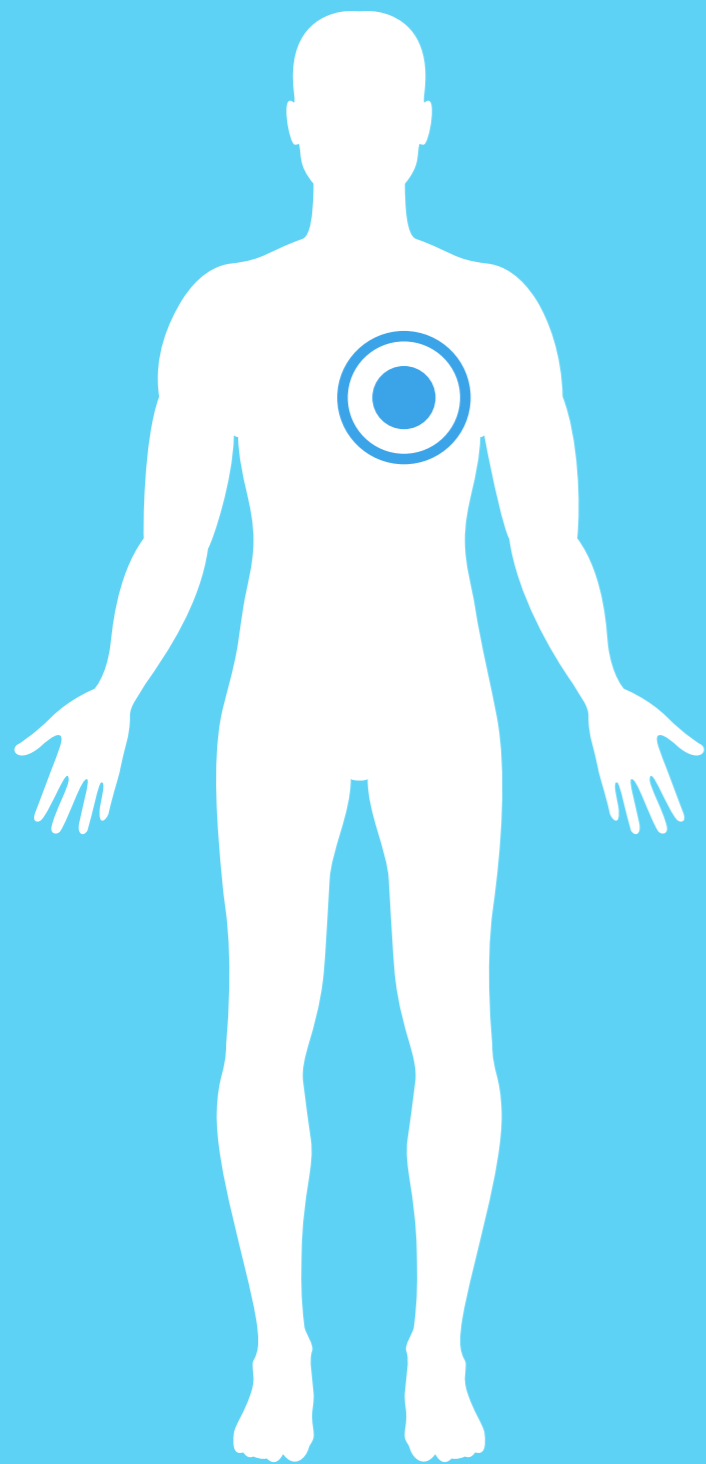


## 2. MASTER THE TENETS OF DONOR-CENTRICITY.



“Master, truly master, the tenets of what it means to be donor-centered. Donor centrality goes beyond throwing a few ‘yous’ in your web copy. It goes to a deep love of humanity and the partners who make your work possible.”

# YOUR DONORS ARE HEROES



“Fundraising is about waking up an army of heroes to join you in your mission.

It’s about inviting people in by letting them sense their own power.”

*Mary Cahalane*

# 3. MAKE A PLAN FOR EVERY DONOR

<http://veritigroup.com/how-to-create-a-dynamic-strategy-for-every-single-donor-a-step-by-step-process/>

**Winner of the 2014 Fundraising Professionals of the Year Awards:**

**Best Industry Blog**



**Subscribe to Our Blog Posts**

\* indicates required

Email Address

\*

First Name

Last Name

Email Format

## How to Create a Dynamic Strategy for Every Single Donor: A Step-by-Step Process

SEPTEMBER 6, 2013 BY RICHARD PERRY AND JEFF SCHREIFELS 7 COMMENTS



The look on her face said it all. "You want me to have more donors on my caseload? Are you kidding me?"

This is usually the reaction our team at Veritus has when we meet with one of our clients. One of the first things they need to do if they want to become successful with us.

Fundraising Totals							
Total Donors 0							
Year	ID #	Event	Event Name	User Name/ Org Name	Registration / Contact Name	Org	City





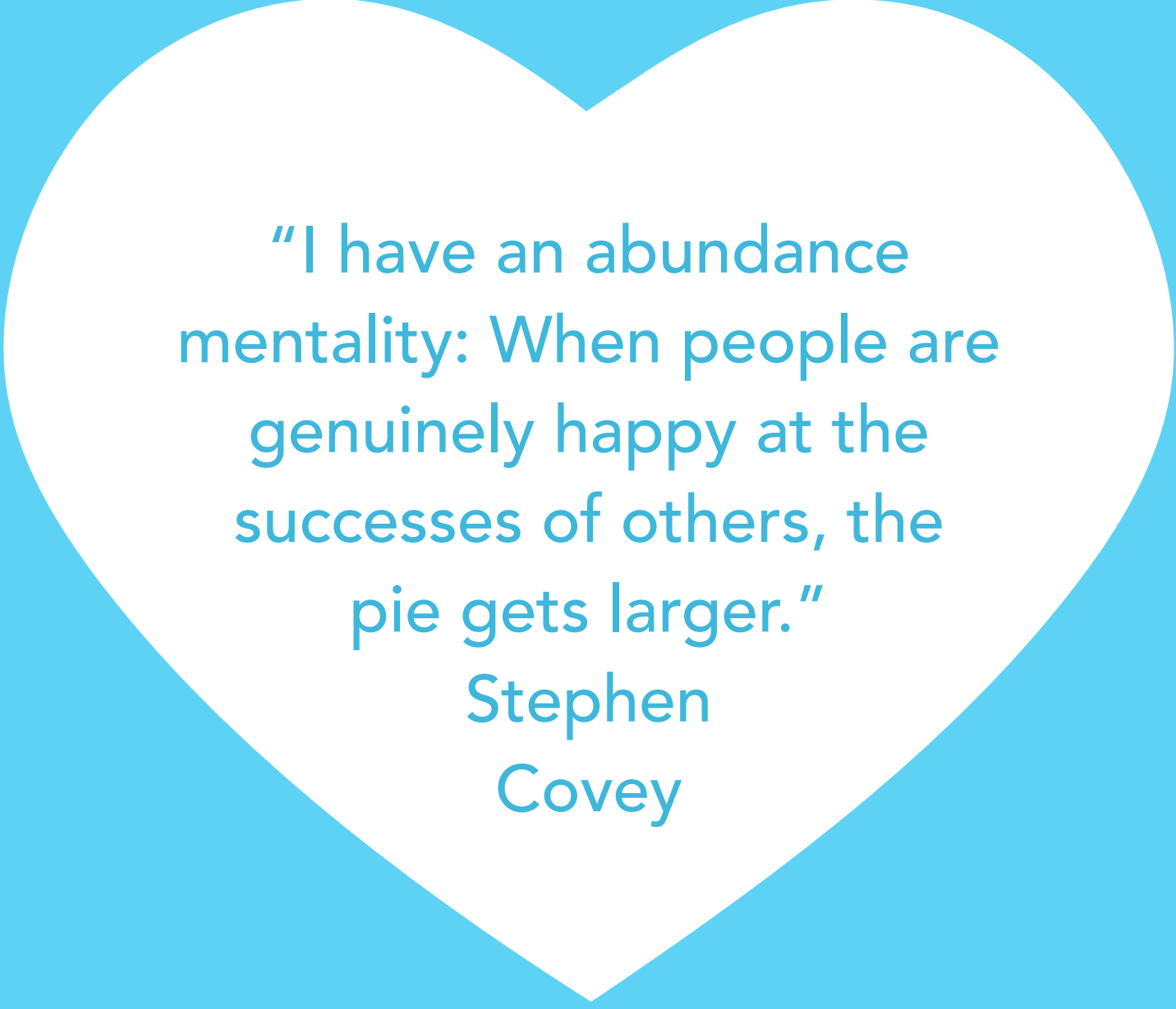
“You’ll achieve your full fundraising potential once you recognize that your donors absolutely share your goal of wanting to create a positive difference in the world — and understand that your job is not to educate, **but to delight and inspire.**”

# 4. MAKE GRATITUDE A DAILY HABIT





Thursday, January 21, 16



"I have an abundance mentality: When people are genuinely happy at the successes of others, the pie gets larger."

Stephen  
Covey

# 5. INTEGRATE PRINT AND EMAIL

92% are driven to online or digital activity;  
87% are influenced to make online purchases;  
54% engage further via social media; and,  
43% download something.

Coalition for Sonoran Desert Protection

Help us raise \$30,000 by June 30 to ensure passage of the Open Space Bond! Your donation will be matched dollar-for-dollar by a generous matching gift!

Photo: Tom Wieswandt

May 2015

Thank you, Pamela, for helping the Coalition in many ways. If you ever make it to Tucson, we'd love to show you around! Kathleen

Dear Pamela,

**What is your favorite place in the Sonoran Desert?** Do you have a favorite trail to hike on the weekend, ride your mountain bike, or go birding? Somewhere you always take visitors to show off the striking saguaros and desert wildflowers?

We are blessed with some magnificent protected open spaces. Our federal, state, and local parks are diverse and cherished: Tucson and Tortolita Mountain Parks, Las Cienegas Natural Preserve, Saguaro National Park, the wilderness of the Santa Rita and Baboquivari mountains.

**Yet these treasured places can't survive on their own if they're not connected to each other.** If they become too isolated, wildlife diversity and numbers will decline. Eventually certain species could become extinct altogether. Development and roads continue to fragment the desert.



Coalition for Sonoran Desert Protection

Double the impact of your donation until June 30 and help us reach our \$30,000 goal!

Dear Pam,

Have you supported the open spaces of the Sonoran Desert this month? Now is the time! We need your help today to pass the \$95 million Open Space Bond in November. This funding will ensure important open space and habitat around Pima County are protected and connected for both people and wildlife.

Will you help us raise \$30,000 by June 30? We are so close and only need to raise \$2,313 more to reach our goal! And due to a generous matching gift, your donation and its impact will be doubled!

We will leverage your donation in the best way possible to gain voter support and ensure passage of the Open Space Bond.

Thermometer: \$30,000 goal, \$0 start, Raised so far: \$27,687

Support open space by June 30 and your donation will be doubled!

# 5. WORK YOUR MONTHLY GIVING

"Based on the excellent advice presented in your Monthly Giving course, we've increased our monthly donors by 242% in just 7 months! We're excited to keep building on this success in the coming school year."

Rachel N. Rodriguez, MPA, MSW  
Development Director, Mountain Mahogany



Rachel Tallman Rodriguez

March 16 at 2:02pm

Happy to report this: Before launching our monthly donor campaign in early October, we had 7 monthly donors. As of today, we have 30! Wahoo! And we're a very small (206 students) charter school...

Unlike · Comment

"...online monthly giving grew by 32% in 2014, compared to just 9% for one-time giving."

2015 M+R Benchmarks study

# Join Audubon's Cardinal Club

Help provide urgent support for birds and their habitats by becoming a member of Audubon's *Cardinal Club*.

Your reliable monthly support will ensure we have the resources to protect Important Bird Areas, advocate on behalf of birds and other wildlife, and continue to be the nation's premier force for bird conservation.

My gift supports:

**Please select a monthly pledge amount:**

Other Amount




# 7. FIGURE OUT HOW TO COMMUNICATE THAT YOUR BEQUEST PROGRAM EXISTS

## “Planned Giving Saved Our Ass!”

**‘Planned Giving Saved Our Ass’**

By Tony Martignetti | December 19, 2013 1 Comment



“Planned Giving saved our ass.”

That’s what a client reminded me recently. I’ve been helping the college capture planned gifts since 2004, and Planned Giving literally saved them four times in the last six years.



# REMEMBER...

‘...dead people, through their estates, give away more money year after year than all US corporations combined.’

*Andy Robinson*

# Planned Giving



## Your Legacy for Birds

Photo by Gerrit Vyn

Print   E-mail   Decrease   Increase

### Planned Giving

- ▶ [How to Give](#)
- ▶ [What to Give](#)

[Compare Gift Types](#)

[Sapsucker Woods Society](#)

[Success Stories](#)

[Life-Stage Gift Planner™](#)

[FAQs](#)

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[Contact Us](#)



## Success Stories



**Bird Cams Inspire Gift in Will**



**Sandy and Jeff Bricker: Passionate Birders Put Lab in Their Plan**

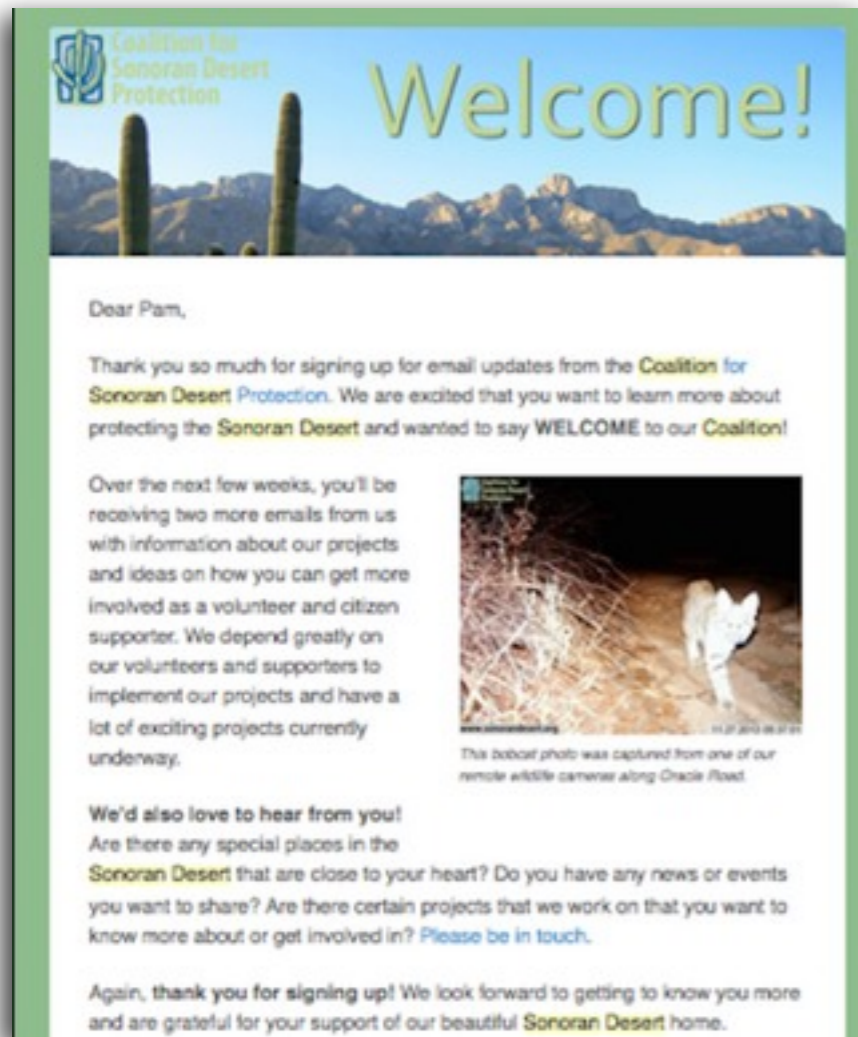


# 8. ZERO IN ON ACQUISITION

“What if I told you Starbucks spends \$1,400 to acquire a customer who starts off by spending \$4.25 for a Caramel Frappacino®. You’d say Starbucks is foolish — until you learned that the **20 year Life Time Value of a Starbucks customer is \$14,099**. That’s why, for the same reason, Amazon spends \$240 to acquire a customer for its \$69 Kindle ... why insurance companies pay more than 100% of the first year’s premium to acquire a policy holder ... and on and on. If consumer companies didn’t invest this way — plus make the additional investment required to hold on to these new customers and convert them to long-term, committed customers — they’d be out of business.”

Roger Craver

# INEXPENSIVE ACQUISITION



Welcome Message (or series)



Event followup (turning ticket buyers into donors)

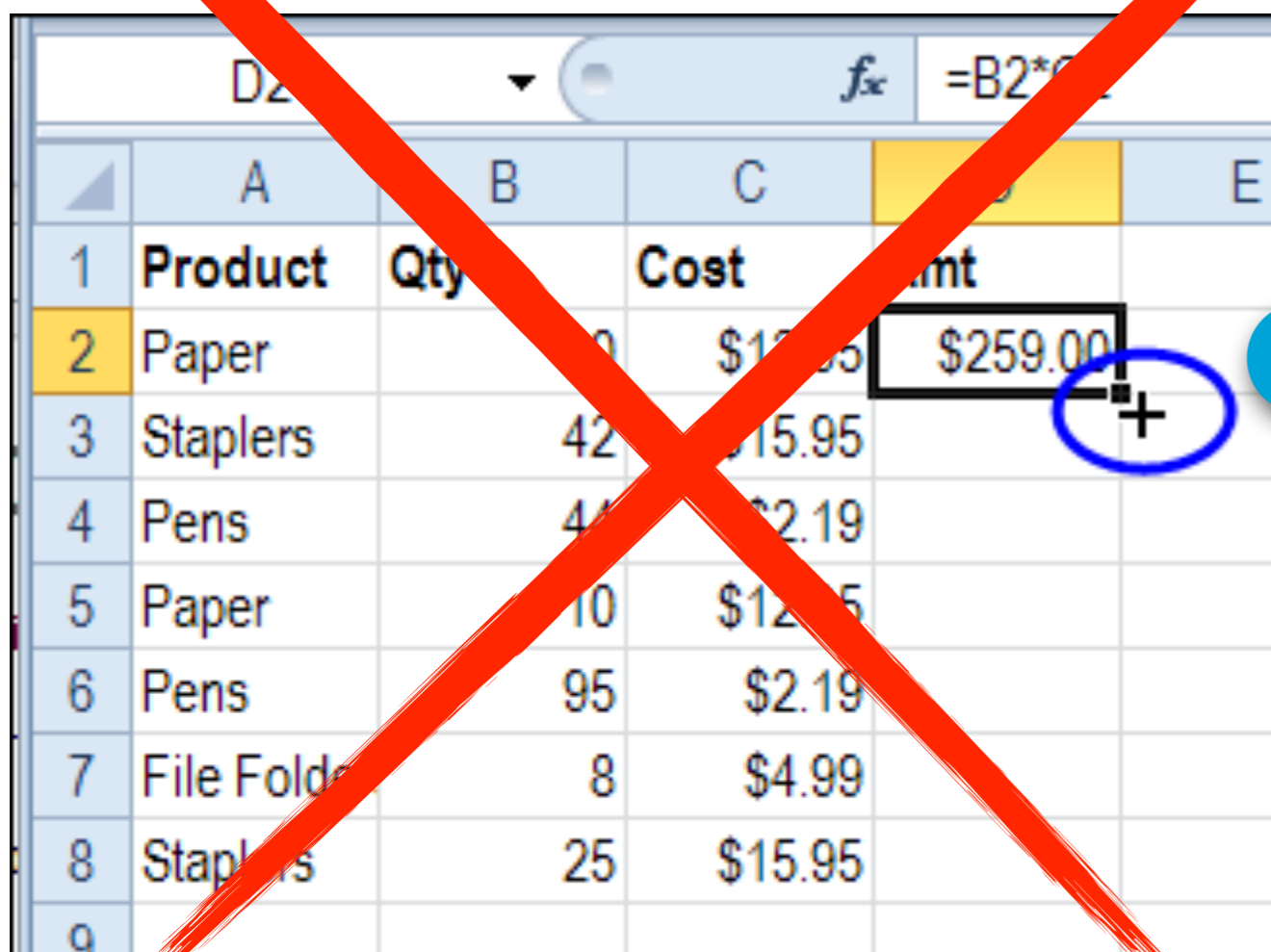


Nonprofit Crowdfunding



Create a system for welcoming new donors.

# 9. CREATE YOUR SYSTEMS AND INVEST IN TRAINING



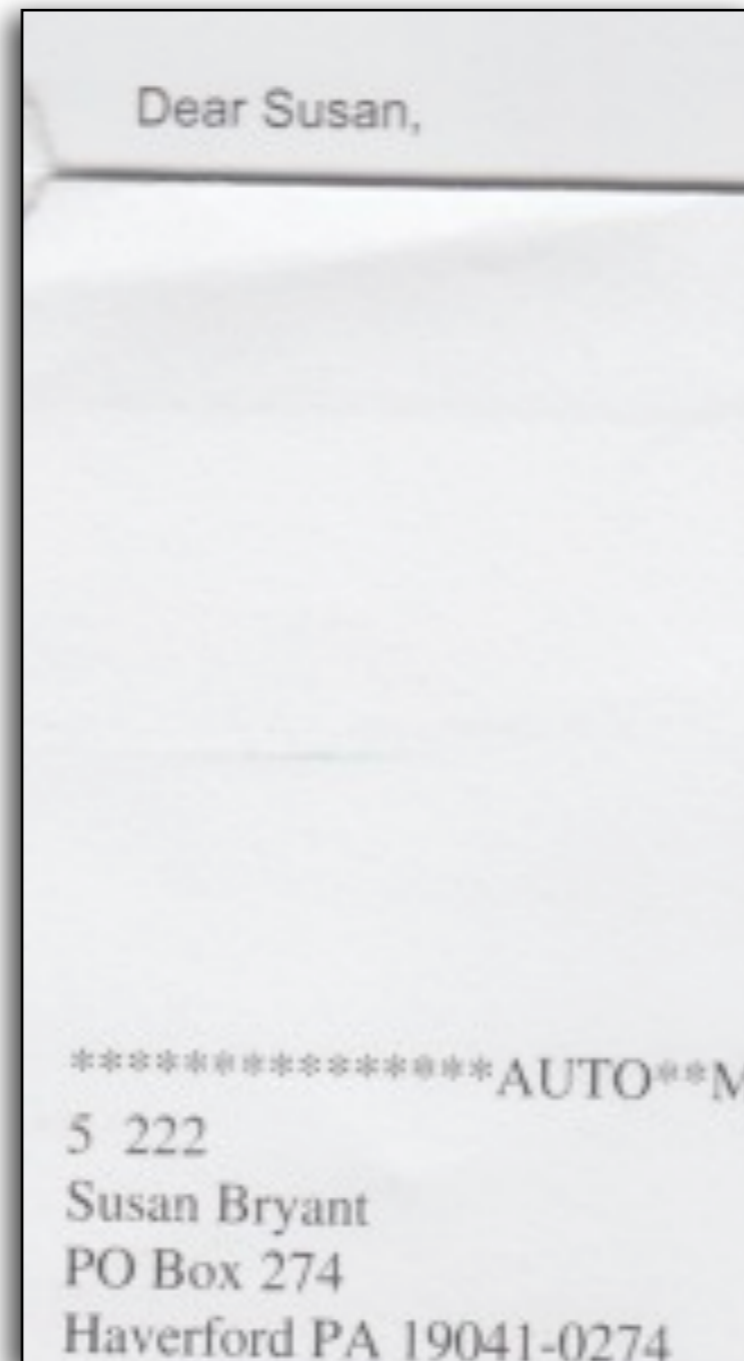
	A	B	C	D	E
1	Product	Qty	Cost	Amount	
2	Paper	19	\$13.63	\$259.00	
3	Staplers	42	\$15.95		
4	Pens	44	\$2.19		
5	Paper	10	\$12.95		
6	Pens	95	\$2.19		
7	File Folders	8	\$4.99		
8	Staplers	25	\$15.95		
9					

*Excel is not a  
database*

# YES, IT'S TRUE!

“Fundraisers getting training raised \$37,000 more in major gifts for each training they got.”

# MY NAME'S NOT SUSAN




# 10. TAKE GOOD CARE OF YOURSELF!



<https://attendee.gotowebinar.com/register/8456002352849767681>





“Faith is taking the  
first step even when you  
don't see the whole  
staircase.”

Martin Luther  
King, Jr.

# NED



# YOUR WORD FOR 2016

Words  
I have  
Power

# MAKE YOURS LEADERSHIP

EMPOWER  
PEOPLE

INSPIRE  
PEOPLE



LEADERSHIP

LEAD  
CHANGE

SHARE  
VISION



don't make  
resolutions,

create  
habits

# DAILY



“Overall, donors who have been phoned for one reason or another (it doesn’t seem to matter) show retention rates 15 percent higher than those who haven’t been contacted.” Roger Craver

# BRITTANY'S HOPE



[Adoption Grants](#) | [Child Sponsorship](#) | [Orphan Care](#) | [Fundraising Events](#)

Google™ Custom Search



[Donate Now](#)

[Donate](#) | [Contact Us](#) | [About Us](#) | [Info](#) | [Site Map](#) | [Mailing List](#)

2015 BRITTANY'S HOPE  
*Holiday*  
Gift Guide

Give a gift that will change an orphan's life forever!

[Shop Now](#)

Brittany's Hope is a 501(c)3 non-profit organization dedicated to aiding abandoned children around the world.

[Make a Donation](#)

## See Hope In Action

Receive exciting updates and stories of how kids' lives are being changed!

Email Address

Name

First

Last

[Sign Up](#)



[Adoption Grants](#)



[Child Sponsorship](#)



[Orphan Care](#)



# MAKE KNOWING YOUR NUMBERS A HABIT

## The 'Beyond Cash' Fundraising Management Dashboard

Date Completed: \_\_\_\_\_  
 \_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_  
 Month / Day / Year

This dashboard is designed to help nonprofit boards of directors achieve fundraising excellence year over year.

Each indicator is critical. However, if an organization prefers to implement this resource gradually, priority should be assigned from left to right, beginning with Retention Rate and ending with Future Commitment. See reverse for additional information.

Example Indicator	Retention Rate	Engagement Index	Median Gift Size	Non-Ask Ratio	New Donor Number	Brand Strength Rating	Future Commitment
<p>GOAL</p> <p>CURRENT YEAR</p> <p>2 YEARS PRIOR    1 YEAR PRIOR</p> <p>Enter your goal (e.g. %, \$, \$) in the top box. Enter actual data for the current year and prior two years in the boxes below the goal.</p> <p>Below is an example of how that might look.</p>	<p>Measures % of donors retained from prior year.</p>	<p>Determines % of new donors who report having learned of organization through an existing donor or volunteer.</p>	<p>Identifies dollar amount of median (not average) gift in total donor base.</p>	<p>Indicates ratio of non-ask contacts (e.g., gratitude, evidence of impact, or general warmth and kindness) to solicitation contacts.</p>	<p>Counts number of new donors introduced per year.</p>	<p>Reflects, in aggregate, the confidence of board and staff in the strength of the organization's brand – both internally and externally.</p>	<p>Quantifies gift commitments for future years – excluding current year.</p>
<p>Example Indicator</p> <p>85%</p> <p>70%</p> <p>67%    68%</p>	<p><b>INSTRUCTIONS</b></p> <p>Calculate percentage of prior year's donors who gave in subsequent year (e.g., from 2008 to 2009).</p>	<p><b>INSTRUCTIONS</b></p> <p>Determine % who report being inspired by a volunteer or donor to initially make their gift or become involved with the organization.</p>	<p><b>INSTRUCTIONS</b></p> <p>Calculate median of all gifts per year. Do not confuse with mode or mean. See reverse for review of the distinction between mean, median and mode.</p>	<p><b>INSTRUCTIONS</b></p> <p>It is acceptable to set a goal ratio for non-ask contacts and use this as a benchmark, instead of measuring every single contact.</p>	<p><b>INSTRUCTIONS</b></p> <p>Count number of new donors added per year.</p>	<p><b>INSTRUCTIONS</b></p> <p>Twice a year, have all board and staff members answer the following: "On a scale of 1 to 10, how confident are you that we consistently &amp; compellingly explain what we do and why we do it?"</p>	<p><b>INSTRUCTIONS</b></p> <p>List dollar amount of current pledges to become payable over the next three (or five) years.</p>
	<p><b>FOR GREATER DEPTH</b></p> <p>Only after retention rate is adequately measured and managed, determine % of retained donors who increase, decrease or maintain gift size. Additionally, segmenting retention per gift range is very helpful.</p>	<p><b>FOR GREATER DEPTH</b></p> <p>Ask what inspired first-time donors to become involved or give. Identify whether the reasons change over time and build on these strengths in programming and marketing.</p>	<p><b>FOR GREATER DEPTH</b></p> <p>Set annual goals regarding increasing median gift size. Be conservatively ambitious.</p>	<p><b>FOR GREATER DEPTH</b></p> <p>Be creative, innovative and strategic with increasing quality contacts with donors that do not involve asking for money.</p>	<p><b>FOR GREATER DEPTH</b></p> <p>Segment new donor numbers for relevance – whether by gift size, geography, or program area.</p>	<p><b>FOR GREATER DEPTH</b></p> <p>Once a year, conduct an inventory to see how/if brand and marketing tools such as logo and messaging are used in materials, both on &amp; off-line. Make them consistent.</p>	<p><b>FOR GREATER DEPTH</b></p> <p>Set goals regarding the number of additional pledges to be made annually – then measure and manage performance.</p>

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Pamela@PamelaGrow.com

WEEKLY

*Get out there*



# TIP

Focus on building relationships with individual donors. **Here's a rule you can use each and every week:** don't write a grant, plan an event or send out an e-mail appeal until you've set up lunch meetings with five donors. —*Joe Garecht*

# QUARTERLY

*Redo your  
thank you  
letters.*

Lisa Sargent Communications | You work hard to attract donors.  
We work hard to help you keep them.

## The Better Donation Thank You Letter Checklist:

From Lisa Sargent

Original version on SOFII > <http://sofi.org/article/how-to-write-a-better-thank-you-letter-and-why-it-matters>; see points #2 and #17 for updates.

1. Is it personalized? (As in "Dear Lisa" vs. "Dear Friend")
2. Is the gift amount noted? **\*Update 2015:** I've been criticized for this by some who say that you need to send a thank-you without the amount, and separately, later, a receipt. When expenses like printing, human capital, and postage aren't so much of an issue, this may be fine. But over a decade+ of including the amount in the thank-you, we've found that noting the amount is well received, delivers good retention – and saves money.
3. Do you start with something other than "Thank you for your gift of..."? Use an exciting lead.
4. Do you tell the donor when and how they will next hear from you?
5. If this is a repeat gift, do you also thank donor for their:
  - a. Past generosity (and indicate all its made possible), and
  - b. Continued contributions/support
6. If this is a gift membership (meaning made by someone else on giftee's behalf):
  - a. Do not thank the giftee, but talk about what "this kind gift makes possible"
  - b. Send a thank you letter to the giftor so they know their gift is on its way as intended
7. Say something new or timely in the P.S. – videos online, a holiday message, an upcoming opportunity to visit or meet with you, etc.
8. Include a contact number they can use if they have questions (you can add an e-mail, but not the generic "info@yourorg.org." Direct them to a warm body, please.)
9. Do you need to thank them for something specific? For example:
  - a. Membership renewal
  - b. Holiday appeal
  - c. Memorial gift
  - d. Capital campaign (focus on all the good this new building/machine/wing will do)
10. Do you need to reference something specific? For example:
  - a. A gift you'll be sending
  - b. A certificate or photo you've enclosed
11. Do you have a website? Mention it in the letter, with a simple call-for-action to drive them there. ("Keep up with all the ways you're helping XYZ at [www.XYZ.org](http://www.XYZ.org).")
12. And remember to:
  - a. Keep the letter short (3-4 paras plus a P.S.)
  - b. Add required tax-deductible language
  - c. Share with them "all your gift makes possible..."

REGULARLY

*Swiipe*

# WHY DID YOU SHOW UP TODAY?

- You know you need to do fundraising better, but you don't know what you need to do to get things started.
- You're frustrated with all the different 'gurus' out there and the glut of fundraising information.
- You just want to learn exactly **WHAT** to do and **HOW** to do it to see real fundraising results now... and long-term.

# THE OBVIOUS QUESTION...

How do I make all of this work, so I can get things up and running quickly?

# OPTION ONE

*Complicated  
and Confusing*



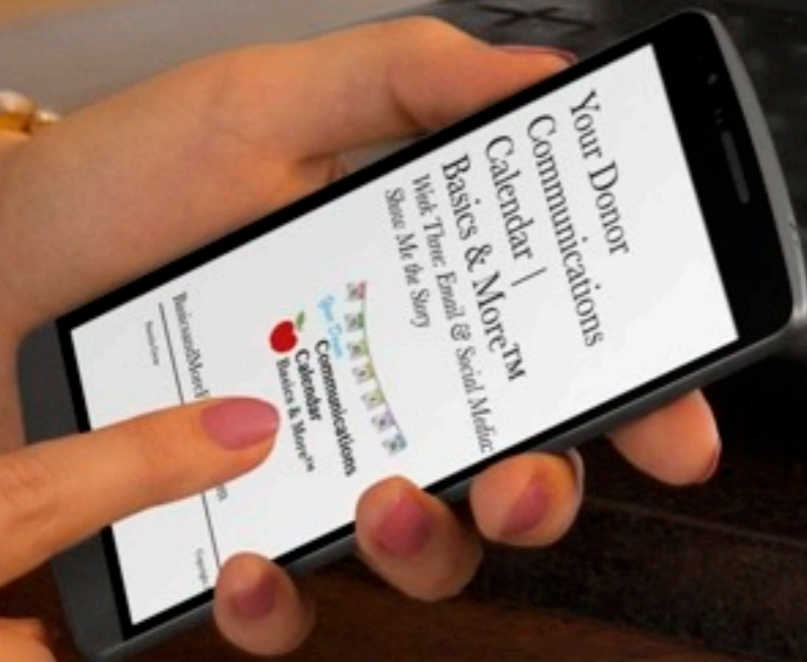
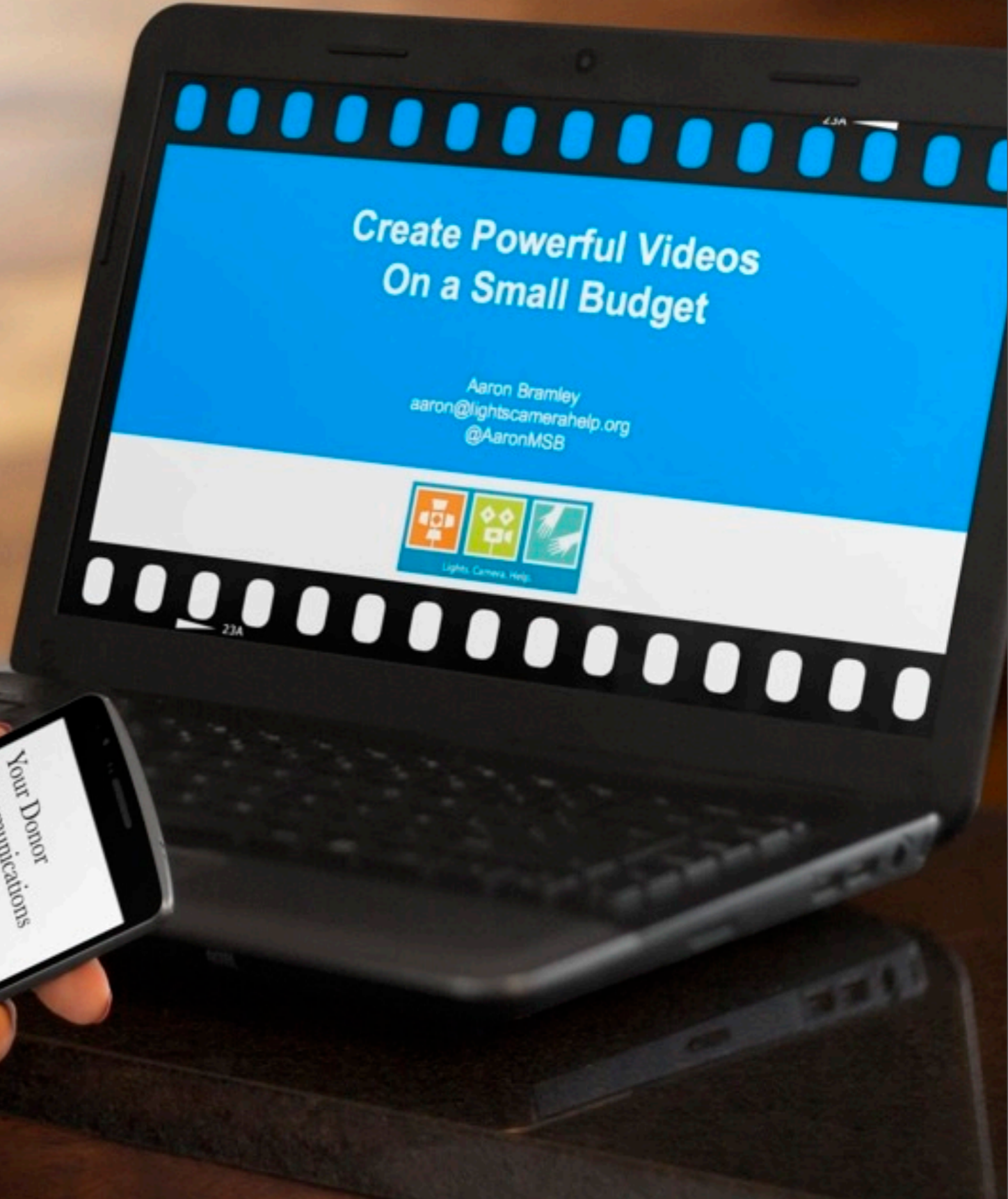
# OPTION TWO

*Simple and  
Strategic*



Basics & More™

*Join me*



# BASICS & MORE™

The All Access Ticket is the single **most comprehensive nonprofit training program** for focusing **YOU** on the important fundraising strategies for long-term success.

# A YEAR OF FOCUSED TRAINING

**YOUR FUNDRAISING PLAN  
& Case for Support**  
Basics & More™



*Your Donor*  
**Communications  
Calendar**  
Basics & More™



**Empowering  
Your  
Fundraising Board**  
Basics & More™



*Getting started with*  
**Major Gift  
Fundraising**  
Basics & More™



**Nonprofit  
Storytelling**  
Basics & More™



**Direct Mail  
Fundraising**  
Basics & More™



**PLANNED  
GIVING**  
Basics & More™



**Power of  
Thank  
You**  
Basics & More™



**Online Fundraising  
Masterclass**  
Basics & More™



**Nonprofit  
Monthly  
Giving**  
Basics & More™



# WHAT YOU GET

- Twenty (plus) courses on topics ranging from our current creating *Your Donor Communications Calendar*, to board fundraising, to monthly giving, to planned giving, to direct mail, to online fundraising, to storytelling, to stewardship, to major gift fundraising - and more.
- Recorded webinars featuring respected experts like Tom Ahern, Erica Waasdorp, Rory Green, Lori Jacobwith, John Lepp, Lynne Wester, John Haydon, and more.



"THANK YOU... for being the wind beneath my wings. These words seem so inadequate to express my gratitude for all that you have taught me this past year.

Your emails are a blessing. I receive many from well-known CFRE gurus but NONE are as useful as yours. Most are content marketing pieces aimed at selling ebooks, Webinars, or expertise. Yours, on the other hand, have one simple goal - empowering people to raise money for causes they are passionate about." Rachel Ramjattan

Special Projects Coordinator

Catholic Charities of the Archdiocese of Miami, Inc.



Go to: <http://basicsandmorefundraising.com/join>

# YOUR INVESTMENT

\$449.00

(or 3 Installments of  
\$149.00)

# FAST ACTION BONUS

Between now and Friday, you  
can get into the Basics &  
More™ All Access Ticket at  
\$75 off the full price

**75OFFTICKET2016**

# GO TO



Go to <http://basicsandmorefundraising.com/join>





QUESTION TIME