



**Grassroots Fundraising**

Patti Lyons, Executive Partner  
PRIDE PHILANTHROPY

**PRIDE**  
Fundraising Experts Since 1925

**GHA**  
Georgia Hospital Association

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**GHA**

**PRIDE**  
Fundraising Experts Since 1925

**Storytelling & Relationships**

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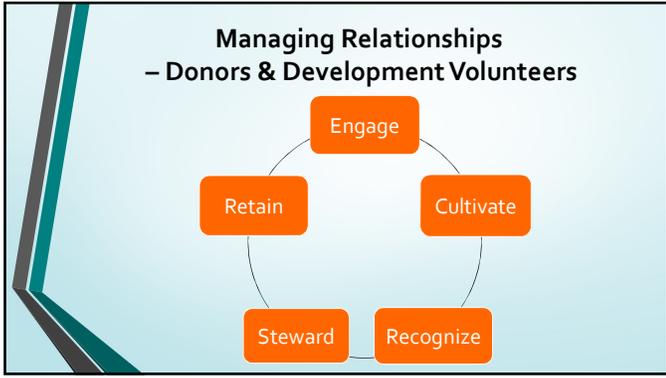
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**Managing Relationships  
– Donors & Development Volunteers**

Engage

Retain

Cultivate

Steward

Recognize

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### Types of Gifts

- Focus on Cash
- New Pledges - Encourage 3 Years – 2017-2019
- Gifts in Kind Can Be Tricky – Appraisals / Establishing Value




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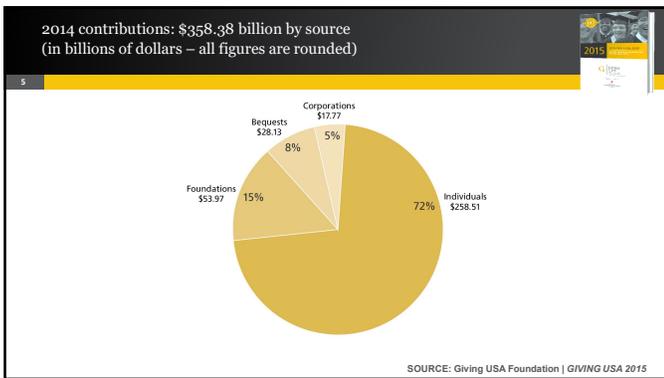
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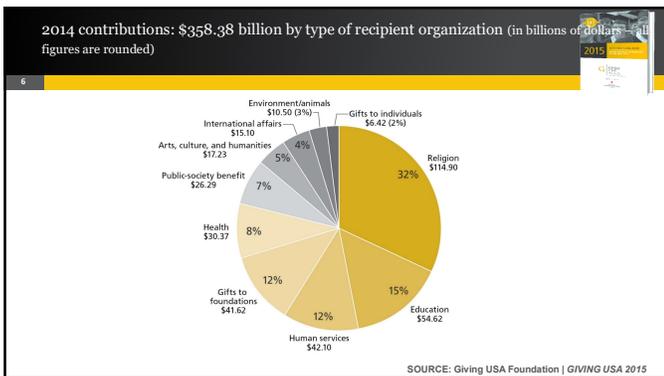
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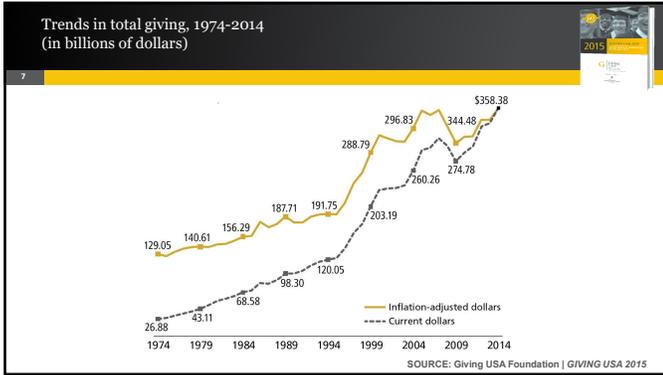
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### Types of Gifts

- Communicating How Gifts Will Be Used
  - Capital
  - Programs / Operations
  - Endowment

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### Why Project & Specific Financial Goals?

- Publicity, Credibility, Endorsement and Coordinated Efforts
- Gives Community Leaders Specific Job, Promoting Volunteer Motivation & Retention
- Raise More Money

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### Elements of a Good Fundraising Project

**Creates the Motivation to Ask for Money**

- **BEST**  
Major project which requires philanthropy to complete and implement
- **2<sup>ND</sup> BEST**  
Major project in which philanthropy reduces or eliminates the need for financing
- **3<sup>RD</sup> BEST**  
Capital needs in a specifically designated area



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### Elements of a Good Fundraising Project

**Addresses the Issue of Costs**

- **BEST**  
Provides lower cost service
- **2<sup>ND</sup> BEST**  
Will not increase costs
- **3<sup>RD</sup> BEST**  
Project provides an important service regardless of potential cost increases



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### Coordinate Education

- Who to Involve?
- Who and How to Recruit?
- Roles and Responsibilities
- Timeline for Implementation?



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### Promotion of the Tax Credit to the Community

- Face-to-Face Visits
- Internal Audiences – Boards, Employees, Physicians, Auxiliary
- Current and Former Donors
- Service Club Presentations
- Printed Material / Mailings
- Email and Website Promotion
- Social Media





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### Sample Volunteer Leadership Orientation

- Campaign Chair Perspective
  - Introduction
  - Why I'm Involved
  - Time Sensitivity
  - Our Roles as Community Leaders





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### Sample Volunteer Leadership Orientation

- CEO Remarks
  - Georgia Rural Hospital Tax Credit
  - Vision



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### Sample Volunteer Leadership Orientation

**Sample Vision:**

*Through implementation of expanded philanthropic initiatives in support of the Georgia Rural Hospital Tax Credit bill, \_\_\_\_\_ Hospital's Development Council seeks to give all segments of our community the opportunity to invest in the future of our hospital, to assure strong stewardship of available resources, and to be recognized as a significant contributor to economic growth and development within the healthcare community.*

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### Sample Volunteer Leadership Orientation

- Chair, CEO or Development Staff
  - Structure of Development Program
  - Project Plans
  - Timetable
  - Roles & Responsibilities
  - Next Steps



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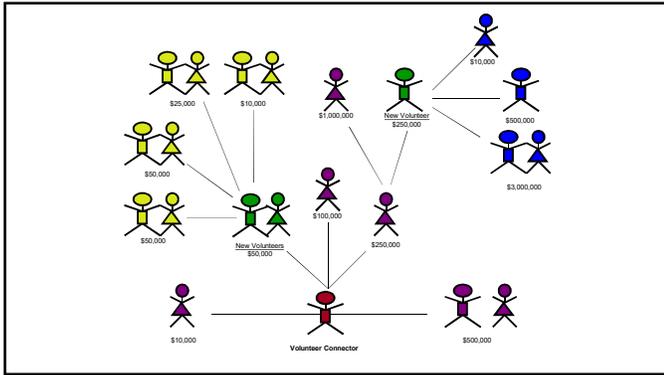
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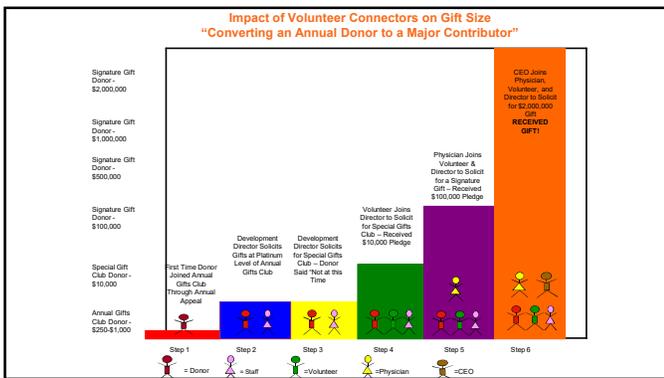
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	<p><b>ORGANIZATION NAME DEVELOPMENT COUNCIL</b> <b>MEMBERSHIP RECRUITMENT LETTER</b></p>	
DATE		
NAME		
TITLE		
COMPANY		
ADDRESS		
CITY, ST ZIP		
Dear NAME: I am involved with an exciting new project in our community and I would very much enjoy working with you to make it a reality. I have recently been invited to join the ORGANIZATION NAME Development Council and accepted the position as NAME OF COMMITTEE Chair.		  
ORGANIZATION NAME Development Council is embarking on an effort to support PROJECT/SERVICES with our "NAME OF CAMPAIGN!". This will be one of the most significant projects ever undertaken in the community, and I would appreciate your joining me in this exciting endeavor.		
We will be having an informational meeting on DATE to hear more about PROJECT/SERVICES from ORGANIZATION NAME Development Council leadership. I would like to invite you to attend this session with me. Perhaps you would be willing to help after you hear more about the incredibly positive impact of this project.		
I will be calling to see if you can join us at this meeting. It is not necessary to make a decision until afterwards, and at a minimum you will get the most up-to-date information on this major community project. Thank you for your consideration, and I will be calling you in a few days.		
Sincerely, NAME Chair of COMMITTEE		

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**LETTER OF INTENT**

If am pleased to accept your invitation to become a supporter of NAME OF ORGANIZATION, I hereby signify my intention, without in any way legally binding myself or my estate, to contribute as follows:

A total commitment of \$ \_\_\_\_\_

This commitment is to be met as follows: \_\_\_\_\_

All gifts are tax deductible to the extent allowed by current law and should be made payable to NAME OF ORGANIZATION.

Signature of Applicant \_\_\_\_\_ Date \_\_\_\_\_

Signature of Spouse \_\_\_\_\_ Date \_\_\_\_\_

**Please print how you wish your name to appear on our membership list:**

Name \_\_\_\_\_

Email Address \_\_\_\_\_ Phone \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ ST \_\_\_\_\_ Zip \_\_\_\_\_


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### The Opportunity to Grow Your Donor Base and Sustain Ongoing Support

- Establishing Giving Clubs
  - Employees
  - Best Ambassadors
  - Impact
  - Giving Levels


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### The Opportunity to Grow Your Donor Base and Sustain Ongoing Support

- Establishing Giving Clubs
  - Physicians
  - Partnership
  - What's In It for Me?
  - Grateful Patient/Families


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**The Opportunity to Grow Your Donor Base and Sustain Ongoing Support**

- Establishing Giving Clubs
  - Annual Gifts
  - Community-Wide: "Join Us"
  - Visibility and Awareness
  - Multiple Levels
  - Recognition



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**The Opportunity to Grow Your Donor Base and Sustain Ongoing Support**

- Establishing Giving Clubs
  - Business Gifts
  - Community Impact
  - Mutually Beneficial



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**The Opportunity to Grow Your Donor Base and Sustain Ongoing Support**

- Establishing Giving Clubs
  - Naming/Signature Gifts
  - Community-Changing
  - Often Current Donors
  - Benefits Beyond Tax Credits



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### Measurements and Metrics

**Metrics** - The process of measurement that produces an outcome



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### Metrics

- Benchmarking
- Moves Management
- Reporting
- Donor Pool
- Cost-To-Raise-A-Dollar
- Conversion Rate
- ROI



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### The Most Common Performance Metrics

- Dollars
- Face to Face Visits
- Contacts of Any Type
- Major Gift Proposals Made
- Gifts 'Closed'
- New Prospects Identified
- Stewardship Contacts



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### Types of Contacts

- Phone Calls
- Personal Letters
- Mass Mailings
- Greeting Cards
- Email
- Voicemail
- Casual Encounters
- Face to Face Visits




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### Questions?




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## Thank you!

**Pride Philanthropy**  
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