Grassroots Fundraising

Patti Lyons, Executive Partner
PRIDE PHILANTHROPY

Storytelling & Relationships

Managing Relationships – Donors & Development Volunteers

Engage
Retain
Cultivate
Steward
Recognize
Types of Gifts

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

2014 contributions: $358.38 billion by source (in billions of dollars – all figures are rounded)

2014 contributions: $358.38 billion by type of recipient organization (in billions of dollars – all figures are rounded)
Trends in total giving, 1974-2014
(in billions of dollars)

Types of Gifts

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

Why Project & Specific Financial Goals?

- Publicity, Credibility, Endorsement and Coordinated Efforts
- Gives Community Leaders Specific Job, Promoting Volunteer Motivation & Retention
- Raise More Money
Elements of a Good Fundraising Project

Creates the Motivation to Ask for Money
- **BEST**
  Major project which requires philanthropy to complete and implement
- **2ND BEST**
  Major project in which philanthropy reduces or eliminates the need for financing
- **3RD BEST**
  Capital needs in a specifically designated area

Addresses the Issue of Costs
- **BEST**
  Provides lower cost service
- **2ND BEST**
  Will not increase costs
- **3RD BEST**
  Project provides an important service regardless of potential cost increases

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

Sample Development Council Organization

Foundation

ANNUAL GIFTS
- First Time Givers
- Employees
- Annual Meeting
- New Physicians
- Special Event Participants

BUSINESS GIFTS
- Large Corporations
- Members
- Major Donors
- Small Businesses
- Local, Regional & National Foundations
- Other Organizations

PLANNED GIFTS
- Annual Gifts
- Special Gifts
- Gifts to Children's Services
- Gifts to Faith-Based Organizations
- Gifts to Hospitals

SPECIAL GIFTS
- Annual Donors
- Hospital/Healthcare Specialty
- Physicians
- Employees
- Auxiliary
- Boards

SIGNATURE GIFTS
- Major Donors
- Estate Gifts
- Gifts to Hospitals
- Gifts to Faith-Based Organizations
- Gifts to Other Organizations
- Gifts to Special Gifts Club

EMPLOYEE GIFTS
- First Time Givers
- Employees
- Annual Meeting
- New Physicians
- Special Event Participants

Sample Volunteer Leadership Orientation

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

• CEO Remarks
  • Georgia Rural Hospital Tax Credit
  • Vision

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.

Sample Volunteer Leadership Orientation

• Chair, CEO or Development Staff
  • Structure of Development Program
  • Project Plans
  • Timetable
  • Roles & Responsibilities
  • Next Steps
**Impact of Volunteer Connectors on Gift Size**

"Converting an Annual Donor to a Major Contributor"

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**ORGANIZATION NAME DEVELOPMENT COUNCIL**

**MEMBERSHIP RECRUITMENT LETTER**

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**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 have 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 be honored to have you join 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
LETTER OF INTENT

I 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 to be directed to the areas allocated by [NAME OF ORGANIZATION] and shall 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

The Opportunity to Grow Your Donor Base and Sustain Ongoing Support

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

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
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

The Opportunity to Grow Your Donor Base and Sustain Ongoing Support

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

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
Measurements and Metrics

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

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

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
Types of Contacts

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

Questions?

Thank you!