

Welcome back to the final installment of Fundraising 101. I hope you can see all of the great things you've learned and I'm really excited to tie it all together and give you the reason why I think fundraising is the greatest privilege we could have. So in this session I want to review the first two classes. I want to show how shoes can significantly help your fundraising effort. I want to help give you some basic pointers for your fundraising year, and we're going to tie it all up with a great bow.

All right, the first class we looked at who gives the money, where it actually comes from, and we find out individuals are the largest source of money, followed by foundations and then corporations. We also looked at the three types of funds your non-profit needs. Annual funds, endowment funds at the bottom, and capital funds in the middle. And we looked to see, we did audits, and we did the homework to see if your non-profit was lining up that way.

In the second class we looked at your donor communications, and there are only really three types of donor communications. There's cultivation, there's solicitation and stewardship. That's it. So you know now whenever you take a piece of donor communication, you can say, "What's the one thing they're trying to do here?"

And then we showed different ways to do that. We looked at written ways, whether it be email or web, or letters or phone scripts. We talked about what makes a written form of fundraising communication effective. We looked at face-to-face, and we talked about the whole cycle of asking without fear, but we also looked at ways to make your face-to-face communications the most effective.

And then we took an extended time with events, because, honestly, that's what most people think of as fundraising when they're getting new to the field. So we looked at what fundraising events are, why they're not as effective money-wise, but they can be effective in voluntary engagement, and how to make them effective. And also we gave you a real overview of how you, as a board member or volunteer, are able to impact your nonprofit's fundraising in a very meaningful way with a pretty low effort fundraising house party. All the homework for that, and we also looked at your fundraising letters to see if you had the we/you ratio, and gave you an outline for doing fundraising house party in the resource materials.

So this time, to wrap up the course, what I wanted to show you is why shoes are so important. One of the first things that I learned in fundraising, and this is going to save you a ton of time, a ton of heartache, and a ton of money, is PYITS. Put yourself in their shoes. This saves you so much heartache. Honest, it does.

First of all, the way to do that is to look at a question like how would you feel about that letter? In the book "Ask without Fear," I talk about a colleague who came up with this entire, incredible fundraising appeal, and it was about credit denied from a family and how their organization helped them get the credit back. Credit denied became the theme for the letter, so they showed us the stamp credit denied across the front of the envelope, because sometimes you can experiment to see if words on the envelope help people open it, or if having no words helps. But they didn't put a return address, because that was their standard thing. The organization that they were with, for whatever reason that was their protocol.

So when people got it in their mailbox, nobody asked how it would feel to get this envelope with a red credit denied stamp on it in my mailbox. They got so many angry people, and when it was shared in one of the groups that I was a part of, people remembered getting that and stopped donating forever. So just, before you send out a letter, before you send out an email, before you do some form of communication, just stop and say, how would you feel about getting that type of communication? Put yourself in a donor's shoes. My world no longer revolves around the nonprofit, how would this feel to me?

What about the timing? I mentioned in one of the classes about phone-a-thons. Is it around your convenience or their convenience? And phone-a-thons are tricky, because you need to get people when they're home and when you can get volunteers, I understand that, but what about other events? Is an evening event better for people, because they can come right after work, or is it better to let them commute home? If you live in a suburban area, and there's urban commute time, do you put it around seven or a little later so that they have time to commute home? Should kids be invited, or should they not be invited? All sorts of things you can do by putting yourself in their shoes.

Another way to think about it, when you put yourself in their shoes, is think back to your letter, the we/you ratio. Is this about your organization and how great your organization is? Or is it about your donor, and why your donor is so amazingly wonderful for having the values that make the impact happen you're your nonprofit gets done? Honestly, we've been studying this increasingly in the last decade, and it's the nonprofits that are able to put the donor as the hero that are actually hitting their fundraising goals and exceeding them. So definitely something you want to think about when you put yourself in their shoes, just a quick check before you send anything out.

Now, I promised a basic plan for the year. So I have information for staff and information for volunteers in this. This is proven helpful. It's not prescriptive, it doesn't mean that you have to get lockstep in this. First, I think it should be staff directed. The best nonprofit fundraising plans are staff directed because staff is there to keep the things moving forward. Volunteers, we can be very effective and helpful, but we have other things competing for our time, so staff is better suited to keep the consistency and execute the plan. Because fundraising really isn't often about fun and enjoyment, it's about executing a well-defined plan.

So what the staff could be doing is consistently doing direct mail. That is something that is still effective in fundraising. I've often used three to four letters myself. I've seen it and talked to organizations that have tested increasing letters to the point where their donations decrease, and that seems to be at about 21 letters. I've never had the guts to do that, but I was doing training in Sweden and I mentioned the statistic, and one of the organizations there said people, even in Sweden and Stockholm were balking, "We couldn't send that much mail. That would be annoying our donors." And it turns out one of the organizations there was doing exactly what I was suggesting. They were testing adding on a new solicitation each year. There were up to ten solicitations and the only thing that they had seen was their donations increase.

So at least four. It would be good to do each quarter, or maybe spring, end of winter, before May, or in May so that before everybody goes away for the winter. Then, beginning of the school year is another good time, then maybe sometime between November and December. If you could get two between that November/December time, that can be effective as well. Then staff should also be directing major gifts through the prospects they want to reach, and plan giving conversations they want to be having with that. They should have that as a mix in their fundraising plan for the year, and then there should be big events. I say big events because the staff can direct those better in many ways, and they also usually involve the nonprofit's budget in a way that smaller events tend not to.

Now, what can a board or volunteer do? They can support everything that's going on here. In addition to that, because people expect staff members to say nice things about the nonprofit, but when a board member says something nice, or a volunteer that's not paid, there's incredibly more authenticity and you have much more authority in saying it.

So the other thing you can do is thank-you calls to donors. I was just doing a training recently where a board chair told me that he would not let his board meetings start without each board member making three thank-you calls, and he got so much pushback for a while on that, until the board members made the calls. The minute they made the calls to do nothing but thank them. "Hi, my name is Marc. I'm on the board of this nonprofit and I just wanted to thank you for making a gift in the past year to support us, you're helping," and then talk about what an impact that gift was having.

What they found is they made much better decisions as a board. The energy was up, because when you express gratitude and you tap into other people's generosity, there's an incredible release of energy. The positivity and the enthusiasm, and the reminder of the mission, made their board meetings so much more effective. So at least doing thank you calls to donors, and maybe consider hardwiring that into your own board time.

Events, you should be attending them, definitely, as a board member. And here's a freebie, don't congregate with the other board members and the people you know. As a board member, you're an ambassador for your charity, for your nonprofit, even at the nonprofit's events. So just choose the people you don't know and introduce yourself. You can also host your own events, and we gave you the plan for that. I think that's an incredibly important and under-utilized activity that board members can add to this.

And then another thing that you can be doing, throughout the course of the year, is identifying prospects and introducing them to the key people in your nonprofit, typically the CEO or the development director. Typically it's one of those two people, but what we found, and when I was early in my professional career, I was an admissions counselor at a college, and we had a funnel. We had people who didn't know anything about the college to all the way down to people that had actually matriculated. They paid their deposits and attended the college.

And what we found was that alumni referrals brought people in much further down the funnel than just general mailings that went out to people who didn't know us. And in part that was because the alumni were doing the filtering. They were figuring out what was the personality

profile of the person they were talking to. Did it fit with the college as they knew it? So when they made a recommendation, the person was a much better fit. Same thing in fundraising.

As a board member, you know the values of the people that are around you, you know the interests. You know, even if they're not interested in your nonprofit, they may be interested in the type of event or the type of activity that you're doing. So you're able to make a much higher quality recommendation. And to help regularly check in with the fundraising efforts of the staff, saying, "Hey who are the major gift people you need? Is there anybody? Can I serve you a list? And I'd be glad to share with you any information I know." Because you see things that staff members don't, so it's incredibly important for that.

I've also given, in the course materials, sort of a thematic idea month-to-month what you could be thinking about in your fundraising year.

That's the course. Congratulations, you have now looked at the three sources of donations. You have looked at the three types of fundraising goals. Annual, capital, endowment. You've looked at the three types of communications. Everything is either cultivation, solicitation, or stewardship. You've looked at the three ways for raising money. Written, face-to-face, and events, and had all the sorts of details on each of those, and actual plans on how to do some of them particularly well, even without any more supervision than having that outlined for you. You've looked at how to do a major gift ask, and just given a brief overview of the ask without fear, get real system. Research, engage, ask, and love. And the fundraising house party, like I said, you've got the outline and you've also got the more detailed timeline in your materials.

You've done it. This is great. Congratulations, you now have a certificate for fundraising 101 from the Fundraising Coach and the Nonprofit Academy. You are now so much better prepared to make your nonprofit raise the money that it deserves to raise, so thank you so much. As a way of closing, I just wanted to say that your being a door opener can be amazingly helpful as a board member. You're just saying, "Hey I think you should meet this person." Or, to the people, "I think you need to get to know this cause." If you can stay in the room when you've made that introduction that will be more helpful, but just being an ambassador and a door opener will help you be far more effective than most boards of nonprofits in the United States.

And you know what, I think fundraising is an incredible privilege. If you've ever heard me do a live training, you've seen this slide, and know our nonprofit is like that power strip. It has all sorts of different outlets, and our donors are like the electrical cord. Unlike this power strip, sometimes the cords have two prongs. Some have two prongs with a fat edge. Some have three prongs. Some have a curvy prong, like utilities used to have. Some are kind of Christmas-tree like in New Zealand, and what we get to do in fundraising is walk up and down the wall of our nonprofit with that cord, and we get to plug it in in the ask and the electricity is released.

See, people are spending their time. They have values, they have desires, they have dreams, they have ideologies and idealism. And then they get into working, and they get into life. And maybe they even get married, or they have kids, they just start kind of creeping away from the stuff that they thought they were going to commit to when they were younger. They put 40, 60, 80 of their best hours, their best waking hours and talents, into earning an income and earning a living.

And what we get to do is help them reconnect those hours with the values that they find most important. We get to bring them together. I mean, who wouldn't want to do that? Who wouldn't want to show somebody that what they're spending their most time with is actually increasing value and making the world a better place in a way that they hadn't even thought were possible for them to participate in? That's why I love fundraising. So thank you for taking the time to be a better fundraiser, and to make sure your nonprofit is better resourced.

On this last slide I just have some other tools that you may want to consider, that will help you take it to the next level. Until then, I look forward to seeing you in the forums, and be sure to tell other people about this course if you found it helpful. Your nonprofit is so much better prepared because you've taken this time and investment, so thank you. Congratulations.