Fundraising for the One-Person Development Office

Our presenter today is
Janet Levine

This presentation is being recorded and will be available on our blog.
Prioritize....
Focus on the **important**, not just the **urgent**

Understand:
- How much you must raise
- What has been successful, so you want to continue
- What you should stop
- And what you need to add to your portfolio
Successful fundraising requires:
1. A great case
2. A viable prospect pool
3. Ways to effectively reach these prospects
4. Active and engaged volunteers
5. Contact reports and a moves management program
6. Metrics to keep you on track
7. A strategy for getting this all done

A reason to give
What makes a great case?
✓ Start with your strengths
✓ Sell solutions, not needs
✓ Be unapologetically passionate
✓ Chose your words with care—you must paint a picture for your prospects
✓ Tell them how they can be involved and
✓ Tell them how their involvement makes a difference
Prospects

- Those you have reason to believe have:
  - The ability to make a gift
  - The interest in your cause or organization
  - The inclination to support you

- And you have access to that person or organization

Suspects

- Are lacking one or more of these qualities

Where do you find those prospects?

- Existing donors, board members, staff—clients and existing donors
- Friends and contacts of the inner circle
- The larger community
Which Internal Prospects?

✓ Donors who have made large gifts.

✓ Loyal donors—have supported you for 3 or more years

✓ People with a sudden increase in their giving

Ways to Engage Those Prospects

• Face to face meetings
• Small Gatherings – “house” or “parlor” parties
• Personal Letter (on personal stationary)
• Gala or other special event
• Open House/tours or other informational event
• Participation in ongoing activities
• Telephone calls
• Personalized letters
• Impersonal letter (direct mail, email)
• Impersonal telephone call (phone blasts)
• Social networking
• Large special event
• Media, advertising, web
What is Most Effective?

The closer you get to your donors, the more likely they are to say yes.

<table>
<thead>
<tr>
<th>FACE TO FACE</th>
<th>1 Out of 2</th>
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</thead>
<tbody>
<tr>
<td>Direct Mail (renewal)</td>
<td>4 out of every 100 DONORS</td>
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<tr>
<td>Phone calls</td>
<td>5 out of every 100</td>
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<tr>
<td>Cold calls</td>
<td>1 out of every 100</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>TECHNIQUE</th>
<th>IS GOOD FOR</th>
<th>RESOURCES REQUIRED</th>
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<tbody>
<tr>
<td>Direct Mail</td>
<td>Unrestricted Gifts</td>
<td>Large Database</td>
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<td></td>
<td>Quick Turnaround</td>
<td>Compelling letter</td>
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<td></td>
<td>Regularity</td>
<td>Money for mailings and/or time to produce in-house</td>
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<tr>
<td>Phone program</td>
<td>Unrestricted gifts</td>
<td>Accurate phone numbers</td>
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<td></td>
<td>Bringing donors back</td>
<td>People willing to call</td>
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<tr>
<td>House parties</td>
<td>Prospecting</td>
<td>Host with strong contacts</td>
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<tr>
<td></td>
<td>Engaging larger givers</td>
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<tr>
<td>Face-to-face</td>
<td>Larger gifts</td>
<td>Qualified prospects</td>
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<tr>
<td></td>
<td>Specific projects</td>
<td>Access</td>
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<td></td>
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<td>Strong solicitors</td>
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<td></td>
<td></td>
<td>Compelling case</td>
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<tr>
<td>Special event</td>
<td>Publicity for organization</td>
<td>Large invite list</td>
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<td></td>
<td>Unrestricted dollars</td>
<td>Volunteer worker</td>
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<tr>
<td>Planned Gifts</td>
<td>Building endowments</td>
<td>Donors who care about the future</td>
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</table>
Successful Fundraising Is

- **the right person** asking
- the right prospect
- for the right amount
- at the right time
- for the right project
- in the right way

Measuring Results

- Number of prospects identified
- Number of calls made
- Number of solicitations
- Number of stewardship steps
- Increase in donor retention/decrease in donor attrition

Over what period of time?
Develop an annual calendar

• First fill in the obvious—the dates of events, when grants are due, if you still do direct mail or have a phonathon, when do those occur.

• THEN, using your metrics, calendar in your cultivation and solicitations of major donors.

Keeping track

THE CALL REPORT:
• Who you saw
• The purpose of the contact:
  – Introduction
  – Cultivation
  – Solicitation
  – Stewardship
• Did you learn anything new?
• What occurred?
• What is your next step (or steps)?
Making the Moves
Moving prospects past “Go” – in a systematic way.
WebLink & DonorPages: Simple download to DPO

Family, friends, colleagues respond due to personal affinity for the supporter.

"I care about this important cause!"

"I care about you so I'll help!"
Supporter reaches out to friends, family, colleagues, sending them to their personal fundraising page.

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Thank you!

We look forward to seeing you in 2014.
Happy Holidays from all of us at SofterWare!

Please send your suggestions and comments to us via
support@donorperfect.com
Twitter: @DonorPerfect
Facebook.com/donorperfect or in our follow-up survey