

Developing a Diverse Fundraising Program

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South Kingstown Land Trust

As an organization:

- About what are you most deeply passionate?
- What do you do best in the world?
- What drives your resource engine?



Passion is our mission and *case statement.*

- ‘At the South Kingstown Land Trust we are preserving open space so that in fifty or a hundred years from now people won’t say, this used to be a beautiful place. We want to protect the view of the ocean and the farmland and the woodlands, vernal pools, stone walls—the very things that make South Kingstown so special.
- We want to ensure that our children and grandchildren can live in a healthy environment with clean water to drink, and locally grown food to eat.
- We do this by accepting donations of land and conservation easements. These we hold in trust, honoring the donor’s wishes while protecting the land in perpetuity (and that’s a long time) ! How can we do this? With yours and lots of other’s help, we have done this. In the last 25 years we have protected nearly 2400 acres of land! We have three different marked hiking trails open to the public, and we are working on others.
- **What are you interested in protecting?**



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The Best!

Understand what your organization can uniquely contribute to the people it touches, better than any other organization



As an organization:

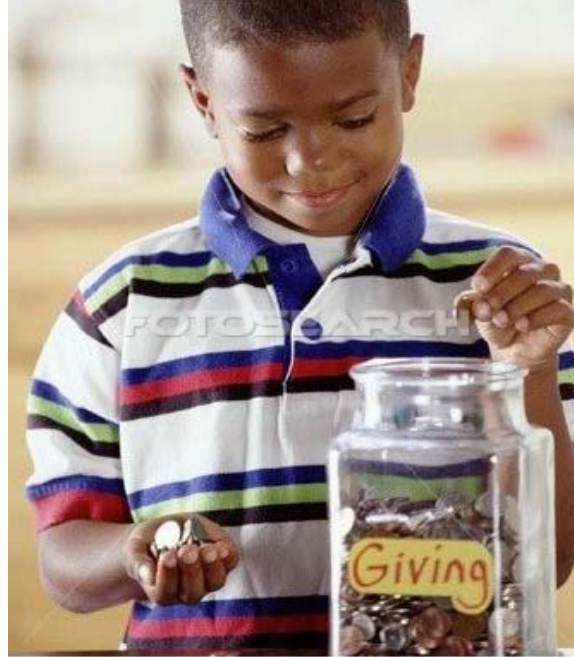
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Resource Engine

Understanding everything it takes to make your organization run well:

- **Time/Talent** -That you are able to receive from volunteers
- **Money**- Grants and gifts from **diverse** sources
- **Brand**- How well you are able to cultivate a deep well of emotional goodwill, and attract potential resources



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- Historically, only once in the last 40 plus years in the United States has giving decreased, despite economic downturns, wars, terrorist attacks, natural disasters and other events, according to a study done by the Giving USA Foundation.





- So, for the skeptic's argument, we may well be into the second time in 40-plus years that the United States may have a downturn in giving.
- Stay the course—and only add what fits into your very tight sphere of what you do.



Would be remiss If I didn't include the realities of the day

- Keep in touch with your best donors. Know how they give. Those who are most likely to be able support you are those who have liquidity rather than those who usually, gave you gifts of stock or gifts from their own companies that may or may not be doing as well. Know to whom people give—PGTP
- Have enjoyable visits and events to keep these people close.
- Have meaningful ways to involve volunteers: Fewer jobs, or people who have been cut back in their hours, or who have taken early retirement--are all good candidates!
- Best projects include: anything that demonstrates your integrity and vision: for us, restoring stone walls, have volunteers adopt property, invite them to help organize events, field trip support, prospects research, office assistance.



The Basics

- Annual Fund: Membership
 - Marketing Documents (Appeals) Annual Report, Newsletter
 - Events
 - Grants/Corporate Funding
 - Major Gifts/Prospecting
 - Capital Gifts/Planned Gifts
-
- Acknowledgements
 - Gift Acceptance Policies
 - Recognition Program



Diverse Programs

- A diverse **fundraising** program means that you have lots of different ways for people to be connected/committed to your organization.
- Think about the ways people give of their time talent and treasure.
- Do you have a catcher's mitt for each of them?



Examples

Membership: Dues

Land Stewards: Tractor Fund

Social Activists: Seminars

Land Barron's: Hikes

Locals: Land Improvement Projects

Summer Residents: Gatherings / Auction

Committed Types: Legacy Society



The Golden Rule

- 7 Touches between appeals
Calendar: Hand out



Why a Legacy Society?

“Americans will transfer at least \$41 trillion between 1998-2052, according to a study by the Social Welfare Research Institute at Boston College. At least \$6 trillion of that funding will be bequests to charity, according to authors Paul Schevish and John Havenes.”



Why Start?

- Some people are strapped for cash right now, but they want to support your work.
- People are thinking about what is important to them. A “planned gift” is a charitable gift that requires more thought than writing a check. Usually these gifts are simple bequests from a will or estate plan, but can be from charitable lead trusts, life insurance policies or life estates.
- Planned gifts are often ignored because the money doesn’t come in immediately.



The National Committee on Planned Giving

Why people make charitable bequests:

- 97% say they care about the charity
- 82% want to do something special
- 35% use planned giving as an income or estate **tax planning** strategy (IRAS!)
- 21% say they know someone at the charity
- A planned giving program is more about loyalty than wealth. Our land trust started 25 years ago. There are many members who have been involved for the entire time. Though they might need their wealth now, they would like to see a portion of their legacy left to us.



So, who makes an ideal donor for a planned gift?

Your loyal, annual donors.

They are not all the same, so listen carefully:

Retirees on fixed incomes are likely to make a charitable bequest

Couples who have small children and extensive expenses are also candidates for a charitable bequest.

Wealthier folks in their mid 50s and older are good charitable remainder trust prospects

Don't get caught up in the details, the donor will be the one who chooses which method they ultimately want to use. Technical expertise on planned giving is available. Your job is to start the program, encourage membership and let your members know the enduring impact they are having.



The Legacy Basics

- Invite your most committed members
- Publicize membership requirements
- Recognize those that have made gifts prior to starting your organization
- Have intimate gatherings with access to your most esteemed leaders
- Give them a pin to wear...



Mom's Rule

Say '*thank you!*'



Penelope Burke

- Ms. Burke conducted a study of 2,250 newly recruited donors who had responded to direct mail from an organization that serves people with disabilities. Of those donors, 220 received a telephone call from a board member within 48 hours after the charity got its first gift. Otherwise, all donors were treated exactly the same in terms of the number and timing of the subsequent solicitations they received.
- Among donors who made a second gift, those who received the thank-you calls gave nearly 40 percent more on average than the others. And by the end of two years, 70 percent of the donors who got the calls were still contributing. Meanwhile, more than 80 percent of the other donors had quit giving.
- Several charities now ask their employees or board members to make telephone calls to thank donors without asking for money



Outcomes

Our legacy members...

- become more involved with our initiatives
- talk to their friends and families about their choice
- seem to truly enjoy knowing one another
- are helpful



Are you ready?



They are waiting!



More Examples

Let's go around the room and share our best fundraisers/friend raisers

Be thinking of how these would work for your organization



Thanks for coming!

