

# Individual Donor Fundraising: Lean Into The Trends



## THOUGHT LEADERS

Corrine Sylvia, CFRE, Connie Carter, CFRE &  
Krystine Sipple, CFRE

## Board of Directors Workshop

*Join us virtually for  
nonprofit board  
governance best  
practices*



Mark your  
calendars!  
Mon, Nov. 15 2021

*Space is Limited.  
Register Early.*

*Register online at  
[chescocf.org/  
virtual-board-trustee](https://chescocf.org/virtual-board-trustee)*

# THOUGHT LEADERS



Sylvia/Carter and Associates

<https://www.sylviacarter.com/>

**Corrine Sylvia, CFRE & Connie Carter, CFRE, Principals**

Fundraising feasibility studies

Fundraising campaign management

Resource development program assessment

Annual campaigns

Major gift development

Board development

Strategic planning

Partnership/collaboration exploration

COVID Recovery & Restore

Krystine Sipple Consulting

<https://krystinesipple.org/>

**Krystine Sipple, CFRE**

Leadership

Governance

Strategic planning

Fundraising

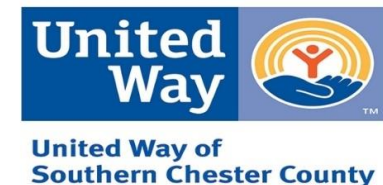
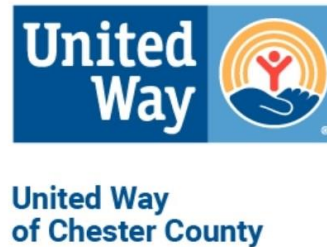
Marketing & promotion

Collaborations & partnerships

COVID Recovery & Restore



# THANKS TO OUR PRESENTING PARTNERS



# BOARD DUTIES



- 1. Ensure Legal & Ethical Integrity**
- 2. Build a Competent Board**
- 3. Determine Mission & Purpose; Ensure Effective Planning; Monitor & Strengthen Programs & Services**
- 4. Protect Assets & Provide Financial Oversight**
- 5. Ensure Adequate Financial Resources**
- 6. Enhance the Organization's Public Standing**
- 7. Select, Support & Evaluate the Chief Executive**

BoardSource, <https://boardsource.org/> Washington DC



# OVERVIEW

## INDIVIDUAL DONOR FUNDRAISING: LEAN INTO THE TRENDS

1. Strategic Planning: Establish Priorities & Funding Needs
2. Role of the Board & Staff in Raising Funds
3. Effectively Prepare & Articulate Your Message
4. Make a Successful Ask: The Art of 'The Ask'



# STRATEGIC PLANNING FRAMEWORK

## Guiding Principles

## 3-5 Goals

## Objectives, Action Steps

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**Vision**

**Values**

**Target Markets**

External Trends  
SWOT

Internal  
Strengths &  
Vulnerabilities

Collaborative  
Partners

**Goal #1  
Program A**

**Goal #2  
Program B**

**Goal #3  
Program C**

**Goal #4  
Marketing/Outreach**

**Goal #5  
Management &  
Governance**

What  
Who  
By When?

What  
Who  
By When?

What  
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By When?

What  
Who  
By When?

What  
Who  
By When?

## AGENDA – PLANNING SESSION

10:00	Welcome / Clarify Today's Aims	Overview of agenda, purpose of day and process; introductions in order of joining
10:15	Mission Statement Review	What is the current mission statement? What resonates? What may be open for possible revision?
10:30	Idealized Design: Core Values, Purpose & Target Market	<ul style="list-style-type: none"> <li>•To what ends are we working? What difference do we want to make?</li> <li>•What core values are key to how we operate ideally?</li> <li>•Ideally, who benefits primarily? secondarily?</li> </ul>
11:15	Break	
11:30	External Trends  Collaborative Scan	What's going on in the world? How does it impact us? PEST Political – Economic – Social - Technological What organizations do we/should we partner with?
12:15	Lunch Break	
12:30	Internal Organizational Strengths & Vulnerabilities	Internally, where are we strong? Where are we vulnerable? <ul style="list-style-type: none"> <li>• Programs &amp; Services</li> <li>• Administration &amp; Management</li> <li>• Marketing &amp; Outreach</li> <li>• Board/Committee Governance</li> </ul>
1:15	Clarify and Prioritize Overall Organizational Initiatives	Based on what we've discussed today, what do we need to accomplish to feel successful - short term? longer term?
1:45	Next Planning Steps	Long term: Draft today's discussions into brief written plan Short term: Budget Review, Discussion, Modifications.
2:00	Conclude	

# Strategic Plan → Funding Priorities

## The Case for Donating

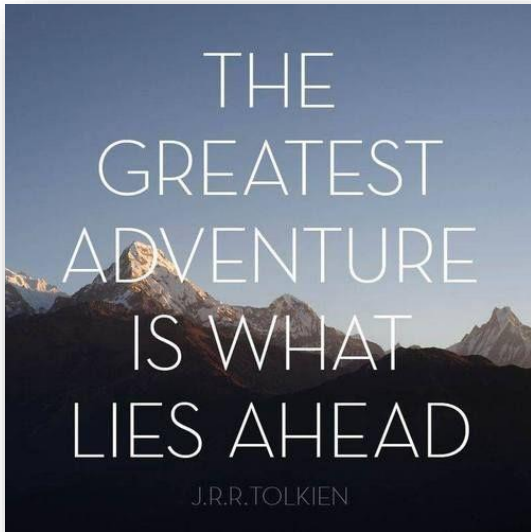
### MAJOR DONORS WANT TO KNOW...

1. **What's the need to be met?**  
*... clear understanding of what I am being asked to support*
2. **Why is it important to the world?**  
*... strong & moving case for support*
3. **How are we going to meet that need?**  
*...solid plan for meeting goals*
4. **How much will it cost?**  
*...cost/benefit, amongst other priorities*
5. **Who else is involved?**  
*...evidence of other support ... sense of leadership*
6. **What do you need from me?**  
*...how do I fit in?*
7. **How will we know when we've accomplished what we aim to do?**  
*...sense of impact*
8. **What's in it for me?**  
*...avenues for meaningful involvement, participation, recognition*





# TODAY'S COVID-RELATED CHALLENGES



- Special events, galas, auctions, holiday events are iffy.
- Tuitions & ticket revenues are down or even gone.
- The novelty of online classes & conferences has worn off.
- Some businesses & nonprofits are struggling, while others are thriving.
- Many nonprofits' reserves are being depleted, as they are being used for operating expenses.
- Everyone is concerned about what the future will bring.

# GIVING IS WIN/WIN – AND IT FEELS GOOD!

- Donating gives people opportunities:
  - to help to make the world a better place
  - to connect with something larger than themselves
  - to remind people that each contribution matters & they can make a difference in the communities they care about
- Giving is a very personal act
  - people give from the their hearts & with their heads
  - giving feels good

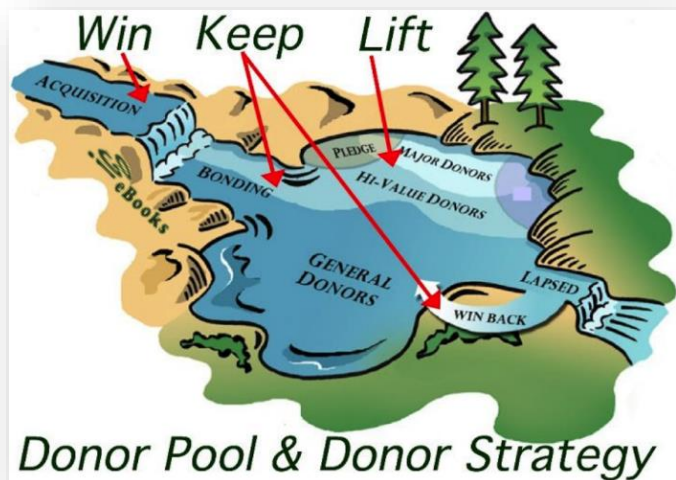
**"One gift from you combined  
with many others has an  
ever-growing impact.**

**It changes lives, communities  
and even the world."**

- Dawn Franks



# FUNDRAISING IS A TEAM SPORT – WHY YOUR INVOLVEMENT IS IMPORTANT



- Foundations help initiate causes and provide seed funding. But it's not their role to sustain a specific nonprofit forever. Foundations & government funders insist on community support
- To thrive over time, nonprofits need a strong, vibrant **pool** of individual donors
- Board members help with fundraising by:
  - providing connections & background research
  - opening doors
  - serving as good will ambassadors
- Staff can't do this outreach work alone
- Fundraising teams build strong nonprofits
- Board members fundraise because they CARE about the CAUSE
- There is NO SUBSTITUTE for Board volunteer involvement in fundraising

# BOARD ROLE: HOW YOU CAN HELP

- Put your energy into activities that will produce the best results. Don't get distracted by details & non-essentials
- Bring your network to the nonprofit
- Develop ways to connect your employer & workplace colleagues to the nonprofit
- Promote your nonprofit all the time
- Pick your best roles in the Ambassador to Steward Continuum and JUST DO IT!



# BOARD FUNDRAISING ROLES: AMBASSADOR TO STEWARD CONTINUUM

- **Major gift solicitors are made, not born.**
- For most people, asking other people to part with their money is difficult at best. Practice helps. Passion is key.
- Developing and sustaining major donors is a circular process that is **ongoing & regenerating**.
- Most of the nonprofit-donor relationship has **nothing** to do with actually asking for money.
- Here are 6 ways that Board Members help develop enthusiastic donors for nonprofits:

## #1-BE A DONOR

Make your own **stretch gift**. Confirm your own commitment & confidently convey it to others.

## #2-BE AN AMBASSADOR:

Ambassadors **naturally talk about our nonprofit** wherever they go. To be a good ambassador:

- Understand and overcome your own roadblocks to talking about our nonprofit.
- Observe good ambassadors in action.
- Identify situations where you can share your personal feelings about our cause.
- Select potential donors to talk with about our nonprofit.
- Practice! Practice! Practice!
  - ☐ Talk about our nonprofit at home.
  - ☐ Talk about our nonprofit with close friends.
  - ☐ Talk about our nonprofit at work.
  - ☐ Talk about our nonprofit with strangers.





# AMBASSADOR TO STEWARD CONTINUUM, CON'T

## #3-BE A SLEUTH



A sleuth is always looking for potential donors to the nonprofit.

**ACTIVE** sleuths find out, when talking with another person, if they are open to the possibility of learning more about our nonprofit.

**QUIET** sleuths explore, through quiet sources, viable prospects.

To be a good Sleuth:

- **Test** if someone is given to philanthropy by recounting a personally fulfilling experience with our nonprofit. See if this leads to evoking a parallel feeling from the prospect about a nonprofit of their choice. Establish common ground about the satisfaction of participating as a volunteer.
- Tell the prospect that you would like to put their name on our **nonprofit's mailing list**. Ask if they would like to come **visit our nonprofit** at some point.
- Ask people who know our nonprofit to **suggest other individuals** who might be interested in us.
- **Look for leads** in the press, social media, and other nonprofits' materials.
- Work with nonprofit leadership to **identify a link** to the person. Help make sure the person is contacted.

# AMBASSADOR TO STEWARD CONTINUUM, CON'T

## #4-BE A CULTIVATOR

A cultivator actively participates in **structured activities** that are part of a nonprofit's organized fundraising process.

Cultivation is **pre-planned and carried out explicitly over time, as a precursor to soliciting the prospect.**

It is very important to plan the process with a nonprofit's volunteer and staff leadership. Have:

- **ways to involve the prospect:** virtual tours, formal & informal discussions, events
- **materials:** case for support, fact sheets, and giving options
- **confidential prospect profile**
- **coaching sessions:** practice the case & the ask



## #5-BE A SOLICITOR

Solicitors **ask a prospect, face-to-face, for a gift.** Practice helps.

## #6-BE A STEWARD

Stewards make sure that **as much care goes into sustaining and growing** partnerships with a nonprofit's donors after receipt of a gift, as was spent before the contribution. This includes follow up visits, review of strategic plans and annual reports, and formal and informal question/answer sessions.

# REFRAME FUNDRAISING

“ Fundraising is the inspiration business, and however much we try to elevate and complicate it; at its heart it is little more than telling stories. ”

Ken Burnett  
Relationship Fundraising

# COMMUNICATE WITH DONORS

As part of a coordinated nonprofit effort with staff & board involvement:

- Ramp up donor communication
  - Check in with donors to see how they are doing
  - Make thank you calls, write notes, video or in person chat
- “Gratitude overcomes fear & rekindles hope”
  - Be a calming presence while acknowledging that this isn’t business as usual
  - Don’t apologize for asking
  - Tell your nonprofit’s story well



# PREPARE YOUR MESSAGE

As part of a coordinated nonprofit effort with staff & board involvement:

- Update your nonprofit's case for funding support
  - create a mini-case for support for what is most needed right now for your nonprofit
  - update language in your nonprofit's case for support & across all your nonprofit's communication platforms
  - include stories from those your nonprofit serves & those who volunteer
  - highlight the impact your nonprofit has made in the past, continues to make now, & what you aim for in the near future





# TELL YOUR STORY

As part of a coordinated nonprofit effort with staff & board involvement:

- Promote your nonprofit's mission & story:
  - On your nonprofit's website
  - Customize web language & graphics for selected social media platforms & emails
  - In press releases & editorial/"good news" articles
  - In talking points for board & volunteers
  - In brief videos to post on social media & website, with permission
- Make communication relevant to your nonprofit's mission
  - Let people know how your nonprofit is responding & adapting
  - Share testimonials of those you serve
    - in writing, with pictures & videos



# THE ART OF 'THE ASK': IT'S ALL ABOUT THE RESEARCH & RELATIONSHIPS

- Effective Fundraising is donor-centered
- Nonprofits need to build strong relationship with prospective & current major donors
  - How did this donor become connected to your nonprofit?
  - What is their history with your nonprofit? With your cause in general?
  - Who else in your nonprofit does the donor know, who can help?
  - Who would this donor want to say “yes” to?



# THE ART OF 'THE ASK': DONOR-CENTRIC

Put yourself in your donor's seat. How does it feel?

- **Time:** What makes you believe your donor is ready to be asked for a gift now?
- **Place:** Where will your asking conversation take place? What's best for the donor?
- **People:** What 1 or 2 people make the best team to talk with the donor & ask for a gift?
- **Case:** What is the focus of your ask? Paint a picture of that vision with your donor. What might strengthen your case, your vision & your ask?
- **Concerns:** What concerns might need to be addressed? What are your responses?
- **Ask:** "Would you consider a lead gift to our cause?"

Then be quiet. Let them think & respond.

- **No/Maybe/Not Yet:** If the donor is not ready to give, ask them to set their conditions for saying yes.  
Time? Information? Organizational involvement?
- **Yes:** If the donor agrees to make a commitment, demonstrate your unabashed joy + provide them with donation instructions
  - pledge note to sign
  - envelope to mail check
  - online URL for credit card donations
  - stock transfer instructions

Heart logic and mind logic are often two very different things.



It has to feel right and make sense to move forward with ease.

If it doesn't feel right, but it seems to make sense, pause, and investigate within.

If it feels right but doesn't make total sense, ask the mind to trust the heart a little more.

The heart's usually the wiser of the two.

~Doe Zantamata

# NEXT STEPS

- Nationally, of the donations to nonprofits:
  - **90% from individuals**
  - 5% from corporations
  - 5% from foundations
- Chester County is **abundantly wealthy**
- **Generous individuals** want to make a positive difference
- Some nonprofits are stretched thin.  
All **need resources**
- **Now is the time** for your nonprofit board & staff to work together as a team to plan & implement a coordinated individual donor asking campaign.





- What life lessons have we learned amidst the COVID pandemic crisis?
- How does this affect the nonprofit sector as we recover and move forward?



# RESOURCES

## COVID IMPACT & LESSONS LEARNED

<https://www.unicef.org/eca/stories/lessons-we-will-learn-pandemic>

<https://www.aarp.org/health/conditions-treatments/info-2021/lessons-from-covid.html>

- [Lesson 1: Family Matters](#)
- [Lesson 2: Medical Breakthroughs](#)
- [Lesson 3: Self-Care Matters](#)
- [Lesson 4: Be Financially Prepared](#)
- [Lesson 5: Age Is Just a Number](#)
- [Lesson 6: Getting Online for Good](#)
- [Lesson 7: Working Anywhere](#)
- [Lesson 8: Restoring Trust](#)
- [Lesson 9: Gathering Carefully](#)
- [Lesson 10: Isolation's Health Toll](#)
- [Lesson 11: Getting Outside](#)
- [Lesson 12: Wealth Disparities' Toll](#)
- [Lesson 13: Preparing for the Future](#)
- [Lesson 14: Tapping Telemedicine](#)
- [Lesson 15: Cities Are Changing](#)

# RESOURCES

## BOARD MATERIALS & SESSIONS

To register for future Board sessions & obtain prior handouts

<https://chescof.org/board-workshops/>

Links to useful articles for nonprofit board leaders

<https://chescof.org/resources/effective/>

## THANKS TO OUR DISCUSSION LEADERS & PARTNERS

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CHESTER COUNTY community FOUNDATION

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