

Fundraising 101

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Emory University

CGS Meeting

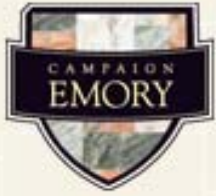
December 1, 2010

Washington, DC



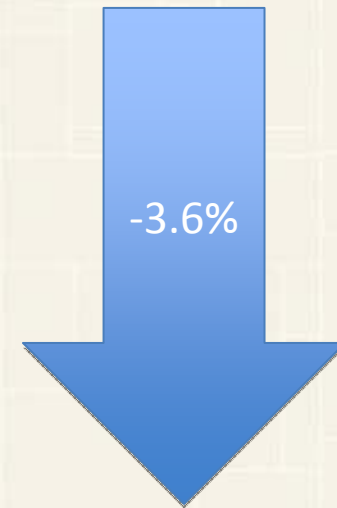
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By the Numbers

Philanthropic Giving in America declined an estimated -3.6% in 2009 (-3.2% adjusted for inflation) to an estimated \$303.75 billion. The steepest decline in current dollar terms since Giving USA began its annual report in 1956.

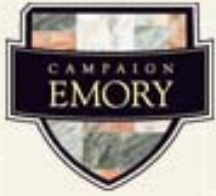


Source: Giving USA 2010, a publication of Giving USA Foundation™



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By the Numbers

In a 2009 review of 1,027 universities and colleges, giving plummeted 11.9 percent, according to data compiled by the Council for Aid to Education.

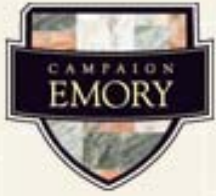
Only an approximate six in ten Education donors (58%) plan to give the same amount this year as last. 30% plan to give less and only one in ten plan to give more.

Multi-Year Pledges are down due to long-term uncertainty.



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Good News...

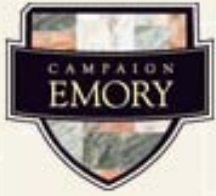
Although giving fell for many educational institutions in the past few years, **the number of donors has increased.**

Long term, this is a good sign as increasing the number of donors broadens the opportunity to cultivate more prospects for future major gifts and bequests.

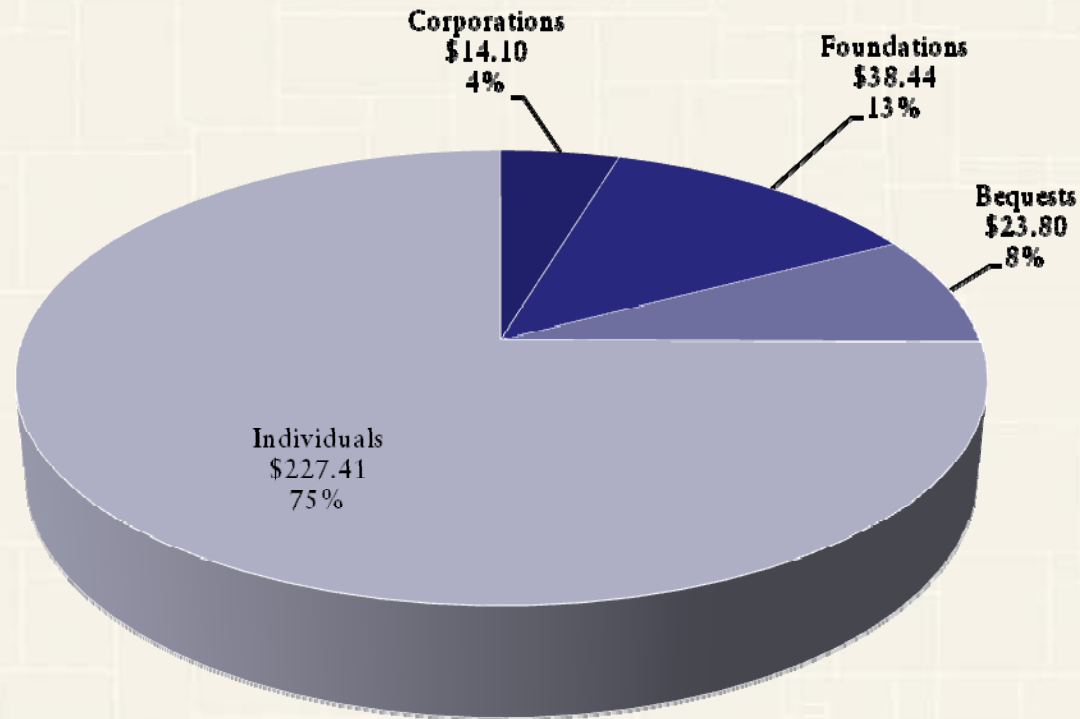


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Philanthropic Giving in America 2009

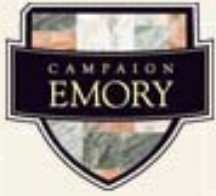


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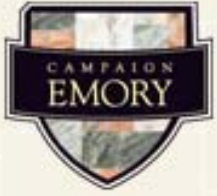


- Of total philanthropic giving in 2009, \$303.75 billion, Education accounted for \$40.01 billion – 13% of total giving.
- Education fundraising projections for 2010 – flat
- Planning ahead for 2011 and beyond



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Categories of Giving

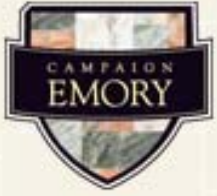
- Regular (annual) Gifts – from income
- Major Gifts – from assets
- Ultimate Gifts – from estates

All are needed for a robust program!

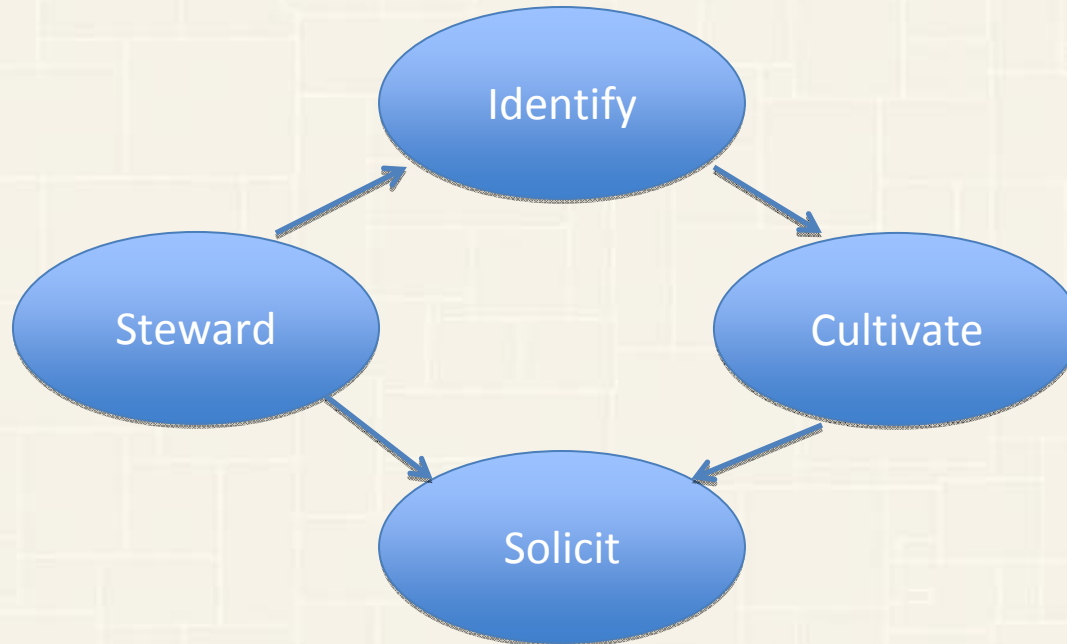


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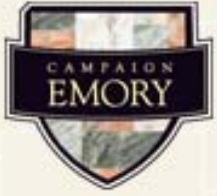


Traditional Fundraising Process



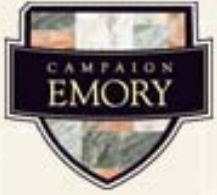
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The Fundraising Process

- ✓ **IDENTIFICATION:** Who are your prospects
- ✓ **CULTIVATION:** Involve your prospects
- ✓ **SOLICITATION:** Turning your prospects into donors
- ✓ **STEWARDSHIP** – keeping your donors engaged, happy and renewing their gifts!



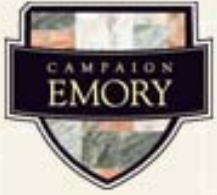
Fundraising Process – A New Direction

- Donor Commitment Continuum – thinking instead of the donor’s emotional connection to the mission of the organization



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Donor Commitment Continuum

LOW

HIGH

Ignorance

Awareness

Interest

Experience

Participation

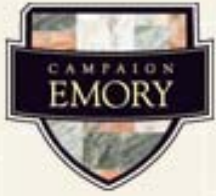
Ownership

Donor's Emotional Commitment to the Mission of the Organization



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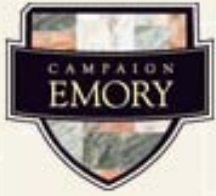


The Donor Pyramid



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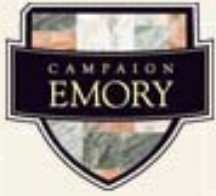
The New Donor Pyramid

- Rethinking the way we view our donors could modify the future of the donor pyramid.
- Research has shown that focusing on Consecutive giving leads to more loyalty and increased major gifts and bequests

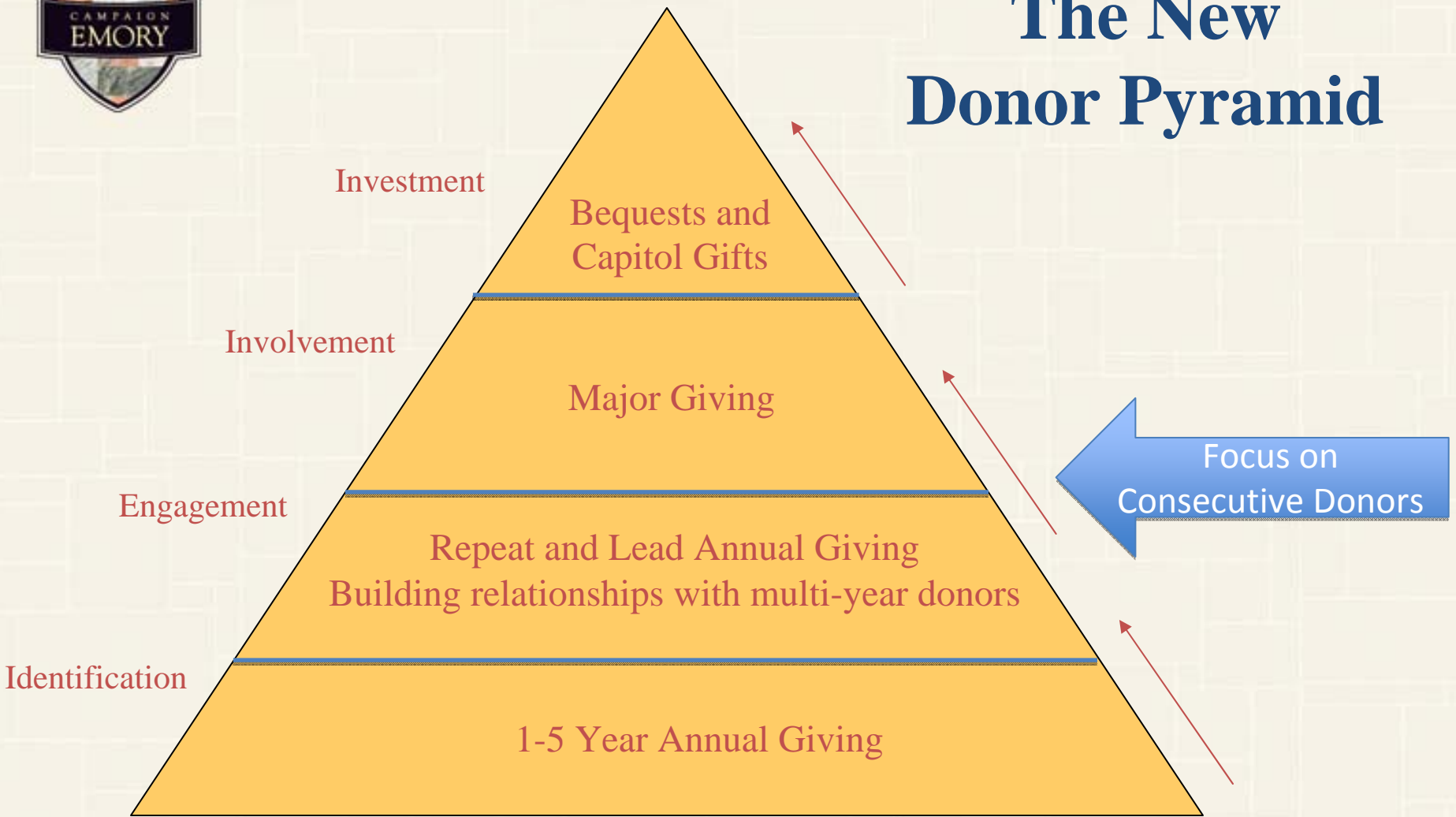


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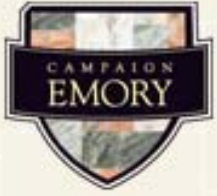


The New Donor Pyramid



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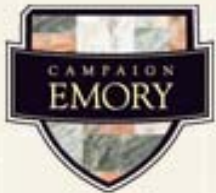
I. Identification

- Students
- Alumni Prospecting
- Collaboration with other schools/units
- Faculty
- Foundation/Corporate Relations



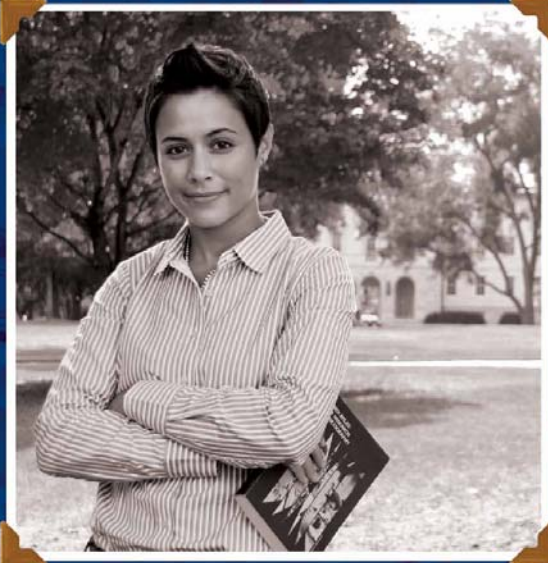
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Student Giving Campaign


Show Your Commitment



Annual gifts to the Laney Graduate School can help graduate students like you by providing critical program, fellowship, or emergency loan support.

Even small gifts—when combined with support from many others—can make a tremendous difference!

Visit <http://www.graduateschool.emory.edu/give>

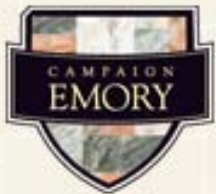


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Faculty Staff Giving

A black and white photograph of Rosemary Hynes, a woman with glasses and a brown jacket, smiling and resting her chin on her hand. She is sitting at a desk in an office with bookshelves in the background.

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**SUPPORTS THE
LANEY GRADUATE
SCHOOL**

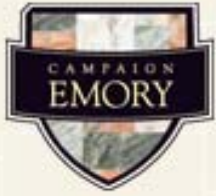
Rosemary Hynes joined the Emory staff 20 years ago as a research assistant. Today as an assistant dean and chief of staff for the James T. Laney School of Graduate Studies, she is as committed to Emory as ever. She supports MyEmory because her gift "truly can build something timeless."

For details, visit
www.emory.edu/myemory



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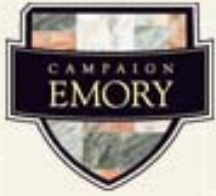
Alumni Outreach

- Correspondence
- Events
 - Local Chapter Events
 - Holiday Parties
 - Dean's Events
- Speaking Engagements
- E-Communication
- Website – Blogs & News



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Annual Giving

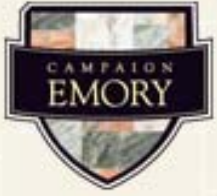
- Renewable
- Unrestricted
- Solicited for current use
- Non-major gifts – typically smaller gifts

Remember – Alumni outreach and Annual Giving are not mutually exclusive – all communication should provide an opportunity for alumni to give



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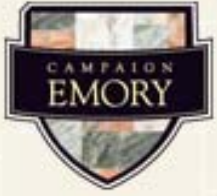
Annual Giving Methods

- Direct Mail
- Telemarketing
- E-Philanthropy
- Events
- Memberships (Museums)



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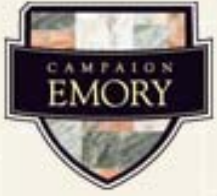
II. Involvement

- Student engagement
- Alumni engagement
- Involving prospects in research/mission
- Volunteer engagement
- Boards, committees



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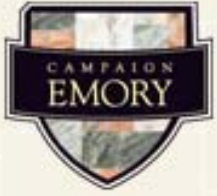
Setting Priorities

- Case for giving
- Additional information from other schools/unit
- Collaboration



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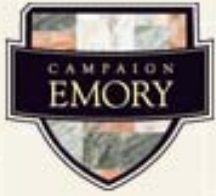


Development is about
RELATIONSHIPS
not
a quick one-time gift

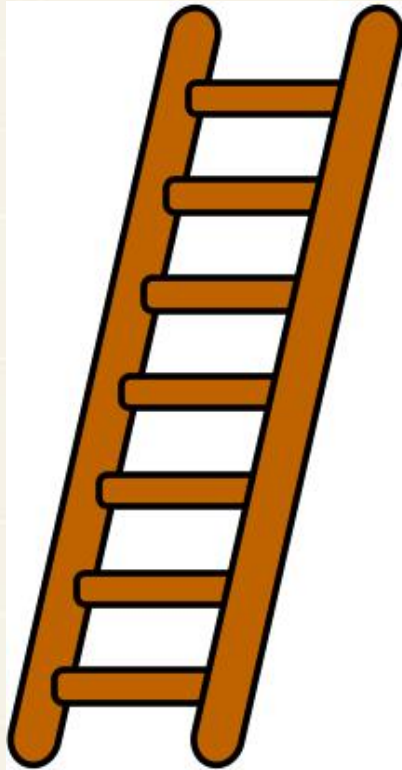


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The Cultivation Ladder



Personal Visit

Personal letter w/follow-up phone call

Small Group Visit

Handwritten Letter

Personal Visit

Personal Phone Call

Events

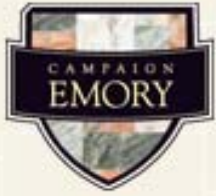
Mass Mail

Telemarketing



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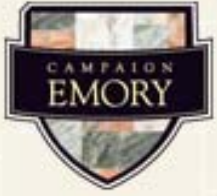
Meaningful Cultivation

- Active engagement with goal of major gift
- May take 1-2 years
- Combination of visits, phone, e-mail etc...
- Find common interests
- Encourage involvement and education
- **LISTEN** then respond
- Be willing to make tough decisions
- Beware of perpetual cultivation!!!



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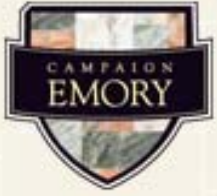
Donor Motivation

- People are motivated to give for their own reasons and they are not always obvious
- A primary motivator of donor giving is a deeply-held yearning to make a difference
- Life changing experiences may be positive or negative and these often contribute to donor motivation



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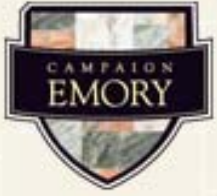
Two Key Tactics for Donor Development

- Create engagement activities to help donors move to the right of the Donor Commitment Continuum
- Connect the donor to one or more life changing events in his/her life



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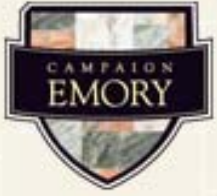
III. Investment

- Don't make assumptions Just because someone has wealth does not necessarily mean they are philanthropic
- Relationship are key – not everyone makes a gift in his/her name
- There is no such thing as “my donor”



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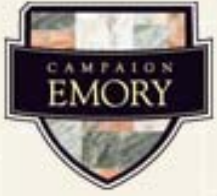
Ready to Solicit

- **Is this the highest and best ask?**
- **How can we raise sights?**
 - Using proper assets
 - Using the tools of planned giving
- **Internal vetting and approval of the proposed ask**
 - Other development officers, naming, program relevance/priority
- **Arrive at a mutual comfort level**
- **Set specific sights of gift importance and size**
- **Prepare the solicitors as much as the prospect!!!**



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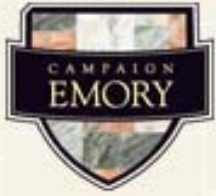
The Ask

- Always prepare a proposal (even if it's not presented)
- Tailor your ask to the individual
- Always sufficiently prepare the prospect to be asked
- Share your plans with your colleagues
- Pick an suitable setting
- Always log your visits/solicitations in a contact report – historical information is vital for long-term relationships



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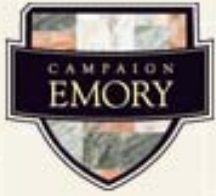
How a Dean/Director Can Maximize Fundraising Effectiveness

1. Provide a clear and ambitious vision for the unit
2. Determine a focused set of fund-raising priorities
3. Communicate priorities to faculty and department chairs
4. Make time to visit with prospects several days per month
5. Develop long-term relationships with prospects
6. Engage in donor cultivation, solicitation, & stewardship
7. Create expectations for faculty involvement
8. Thank volunteers and donors frequently
9. Have high expectations of unit development officers



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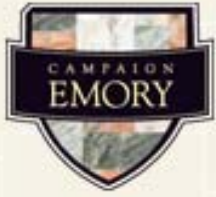
How Development & Alumni Relations Should Support a Dean/Director

- 1. Providing and supporting competent professional development and alumni relations staff**
- 2. Establishing University-wide standards for performance**
- 3. Overseeing annual planning & goal setting for School/Unit**
- 4. Providing training and seminars for development staff**
- 5. Conducting formal evaluations of development staff**
- 6. Providing University-wide operational support to Schools/Units**
 - Annual Fund, Corporation/Foundation, Planned Giving, Development Communications, Development Research, Gift Processing, Donor Records, Event Planning, Stewardship.



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What Deans/Directors Should Expect from Development Professionals

1. A Development Operating Plan Providing:

- Goals for activities and outcomes
- Tailored strategies for major gift prospects

2. Campaign Strategy:

- Estimated time needed from Dean/Director & faculty for Development efforts
- Estimated time needed for managing volunteer leadership & committees

3. Progress Reports Including:

- Prospect contacts (Qualification, Cultivation, Solicitation)
- Proposals/solicitations completed
- Gift and pledge totals

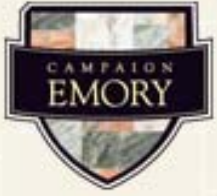
4. Proactive Contacts with Donors and Volunteers:

- Growing a pipeline of likely prospects
- Leadership in building strategies and coordinating next steps
- Developing effective proposals



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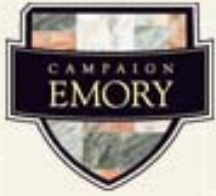
Practices of Effective Development Officers

1. Identifies, cultivates, and involves prospects
2. Knows Unit & Programs as well as Dean's priorities
3. Makes extensive use of all Development resources
4. Staffs Deans, faculty, and other leaders
5. Recruits and staffs volunteers & volunteer committees
6. Develops an effective strategy for major gift activity
7. Asks for gifts personally and/or as part of a team
8. Develops timely letters, proposals, and gift agreements
9. Provides regular stewardship to donors



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