

# *YWCA Columbus*

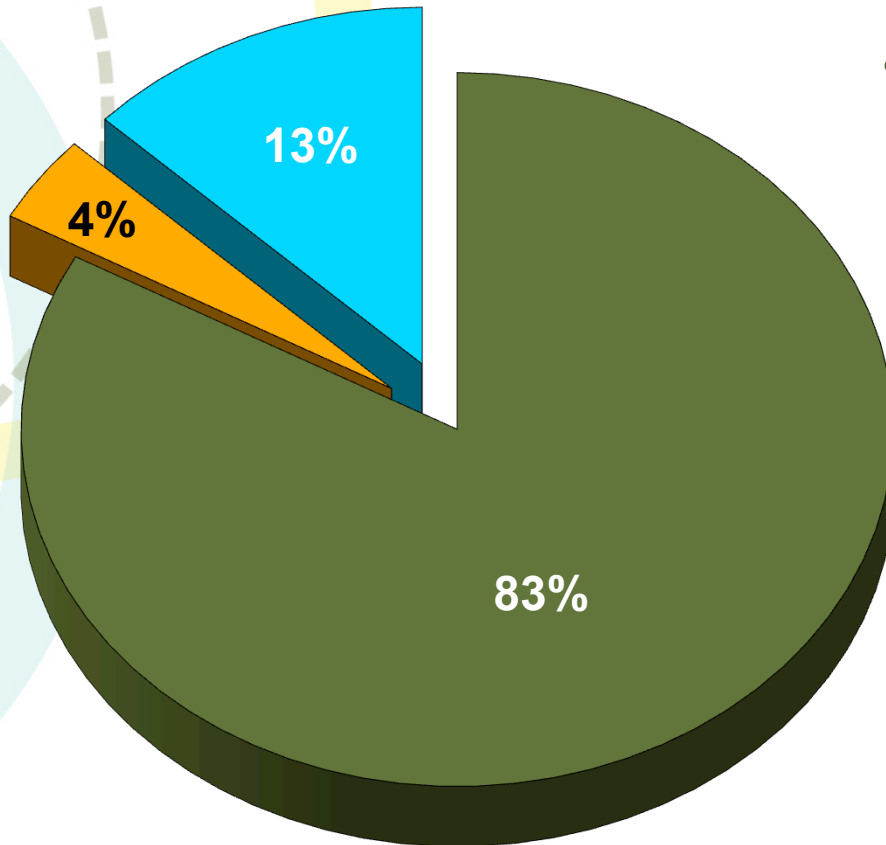
*Fundraising Training for Board and Senior Staff  
March 2, 2011*

*Presented by  
Benefactor Group*



# *Understanding Philanthropy*

# Who makes charitable contributions?



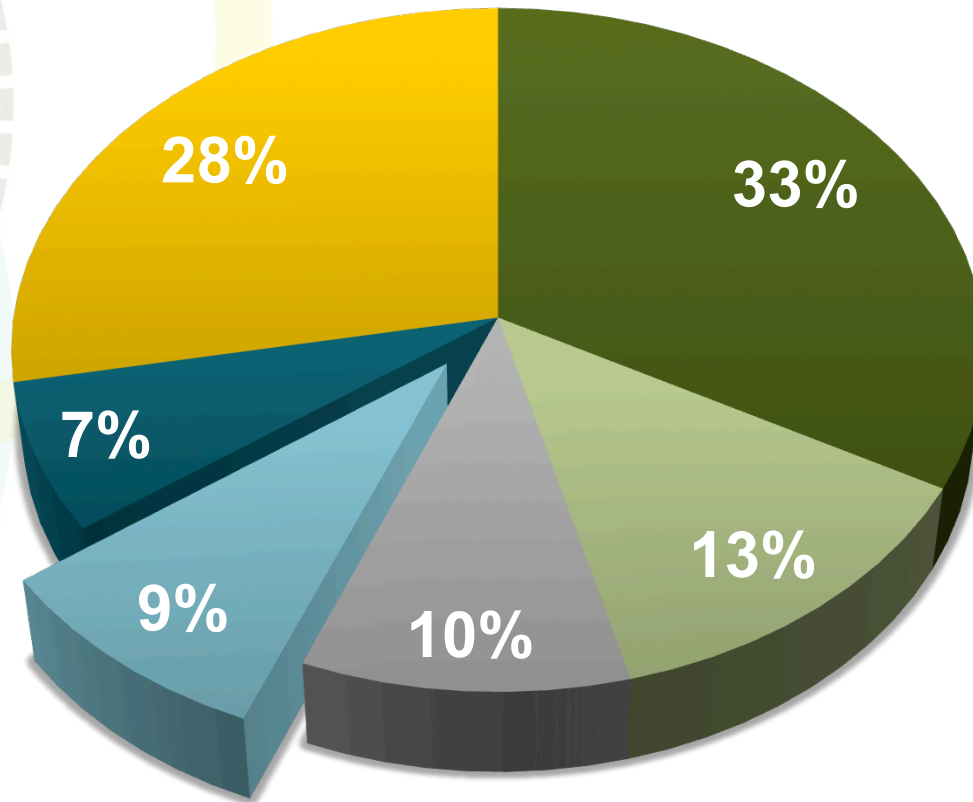
- 2009: \$304 billion given to nonprofit organizations:

Individuals:  
\$ 227 billion  
+ \$24 billion bequests

Foundations:  
\$38 billion

Corporations:  
\$14 billion

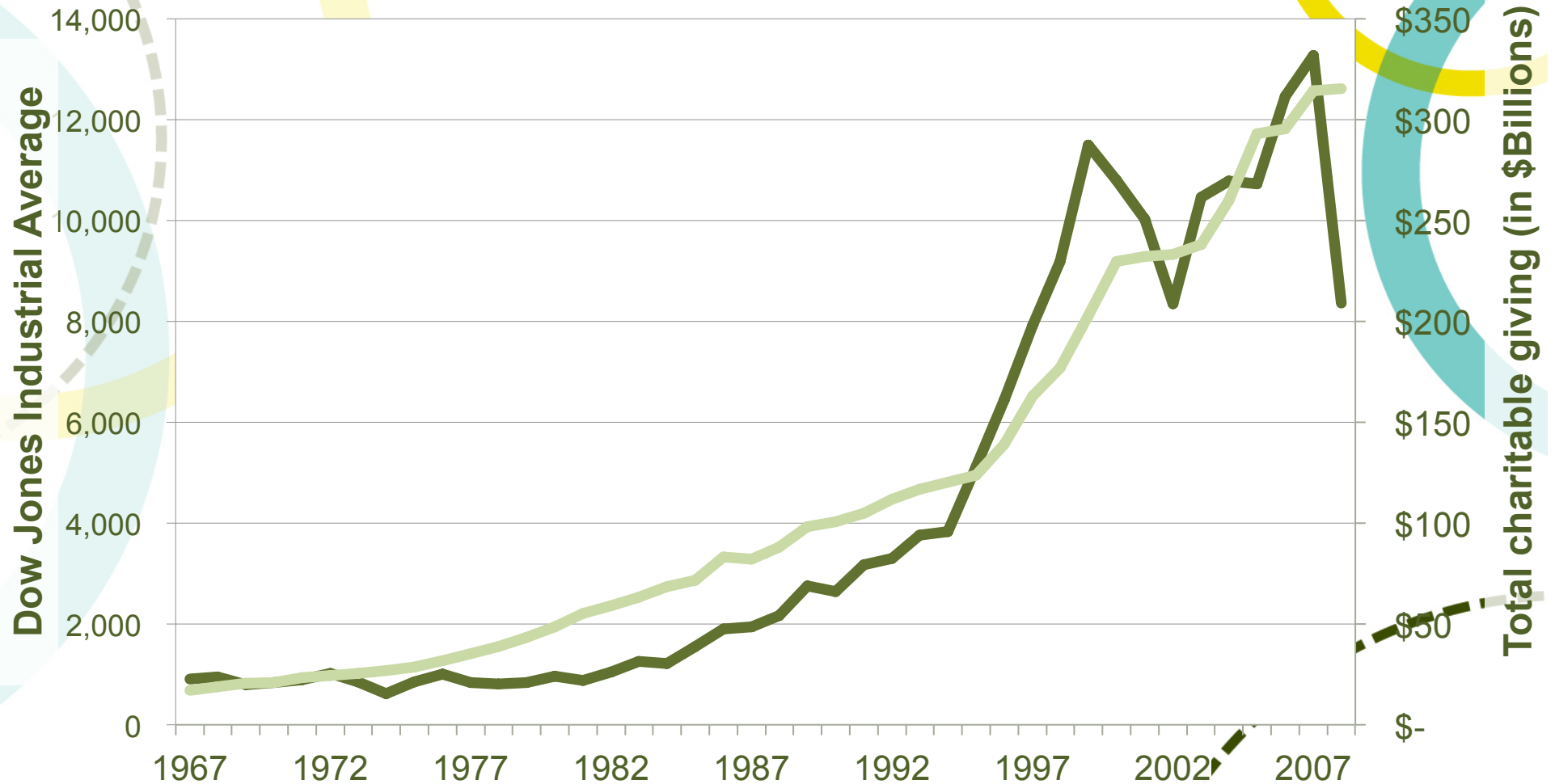
# Who receives charitable contributions?



- Religion: \$100.95
- Education: \$40.01
- Found'ns: \$31
- Hum. Serv.: \$27.08
- Health: \$22.66
- All other: \$82

Source: Giving USA 2010

# Charitable Giving is Resilient

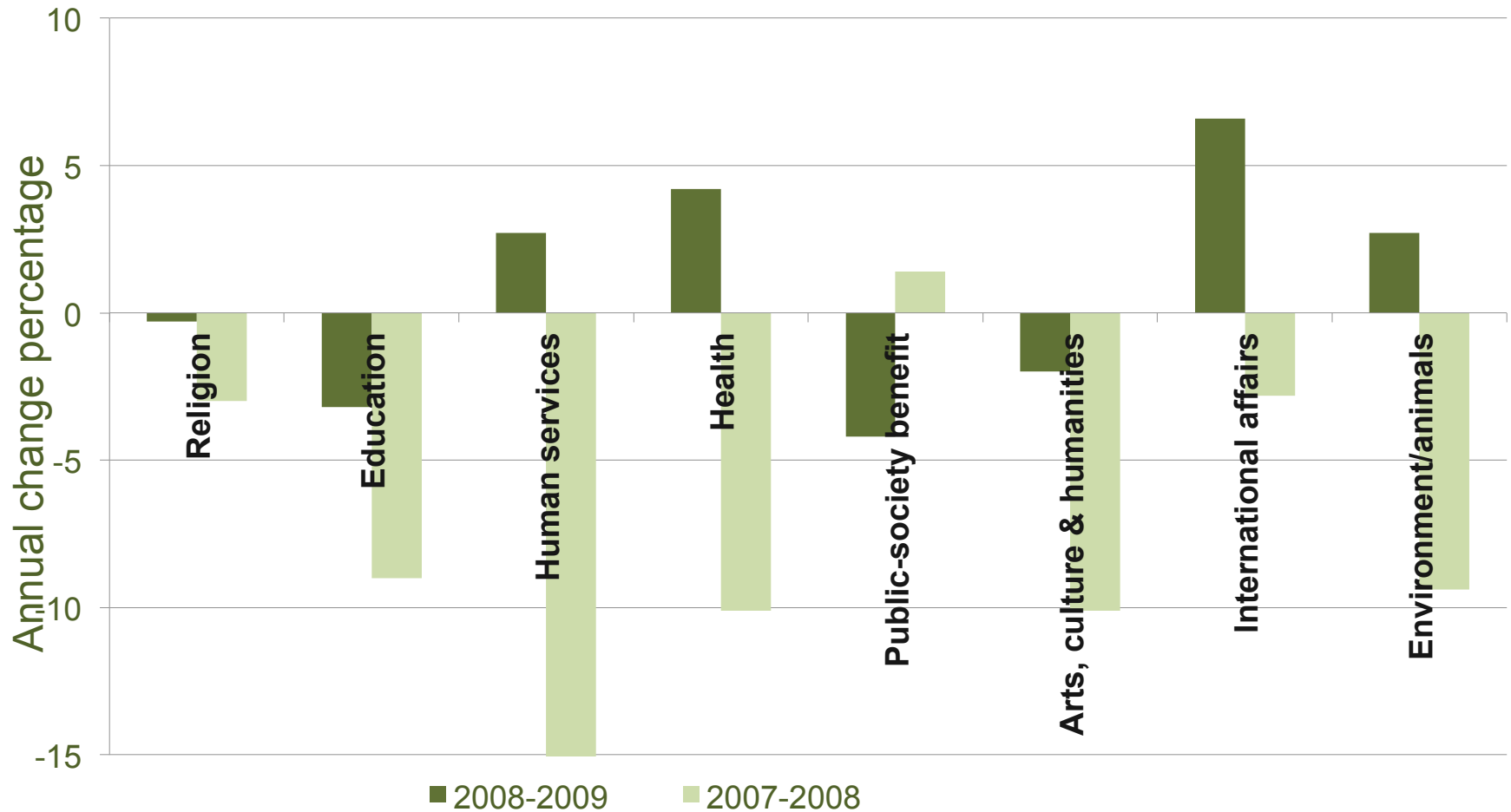


— DJIA — Total Giving

(in current \$\$, not adjusted for inflation)



*..but recent years have been a challenge*

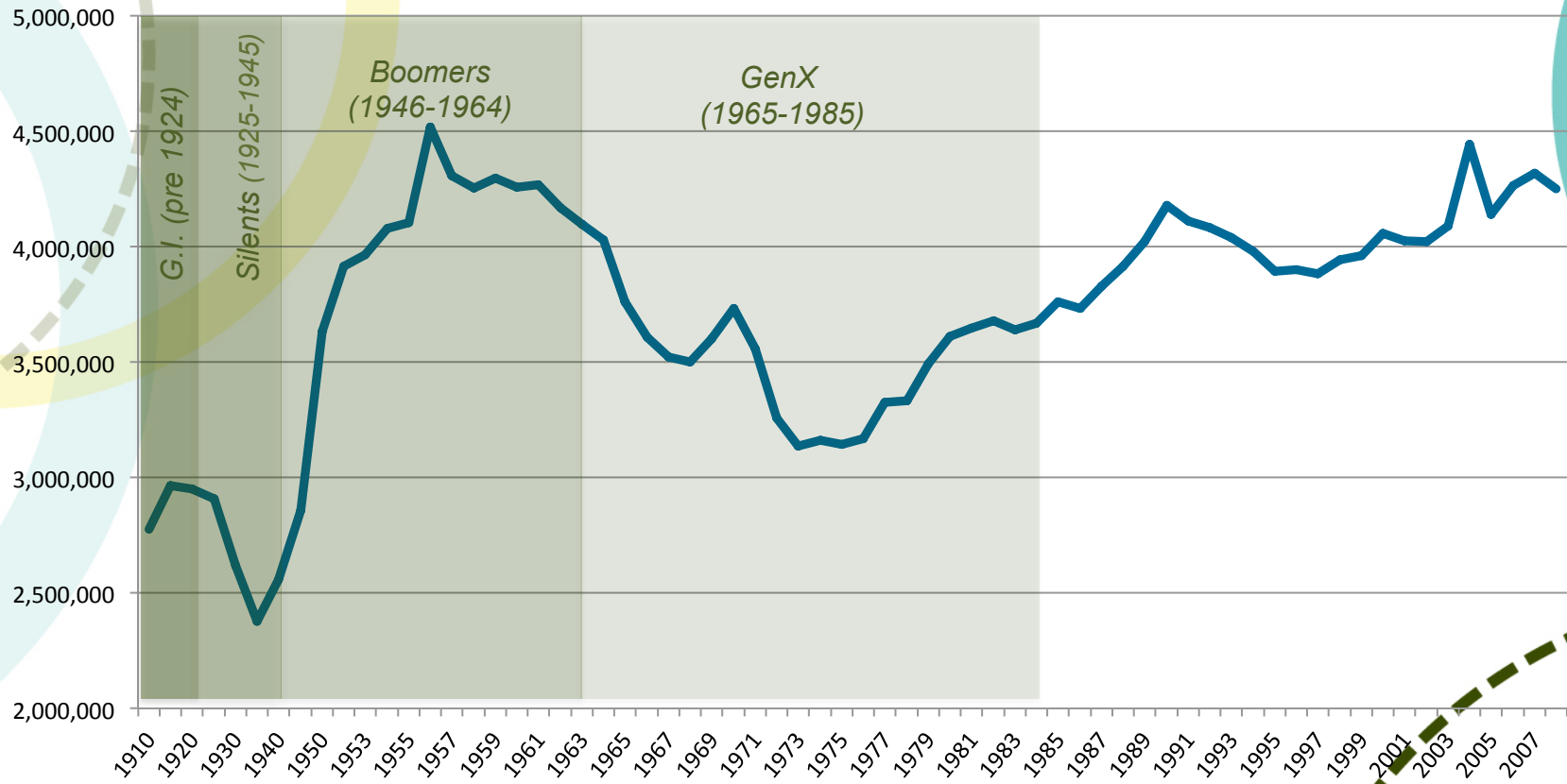


# *Trends in Philanthropy*

- Giving overall tends to increase slightly faster than inflation
  - Growth areas are health, human service, international, and environment
- Emergence of new donors
  - Women, Gen X, racial/ethnic cohorts
- Digital giving
- Broader definition of “philanthropy”
- Increasing demands for “social change”
- Decreased institutional loyalty

# Generational Shifts

(number of US births per year per generation)



# Cultivation: Know Your Individual Donors

Cohort	G.I.	Silents	Boomers	Gen X
Year of birth	Pre-1924 (86+ years old)	1925-1945 (65-85 years old)	1946-1964 (46-64 years old)	1965-1976 (34-45 years old)
Primary trait	Civic	Adaptive	Idealistic	Reactive
Message style	Rational and constructive with an undertone of optimism	Sensitive and personal with an appeal to technical detail	Meditative and principled, with an undertone of pessimism	Blunt and kinetic
Financial style	Cautious	“Save a little, spend a little”	Refocusing on non-materialistic values	The purpose of money is enrichment, not status

Adapted from “Pinpointing Affluence in the 21<sup>st</sup> Century: Increasing your share of major donor dollars,” Judith Nichols, Ph.D., CFRE.

## *Why do people give?*

- Shared values
- Personal relationships
- Involvement with the organization's mission
- Image and appeal of the organization
- Recognition, tax deduction, parties
- The “warm glow”

## *Why do people fail to give?*

- They were never asked

# *Who is most likely to give?*

- A current donor
- A recent donor
- A past donor
- Someone involved with your organization  
(board member, staff, volunteer, Society member, museum visitor, recipient/user of services, etc.)
- Someone who supports similar organizations
- Someone who is generous
- Someone with wealth



# *Asking for a gift*

# *Solicitation: “Askophobia”*

Why are you reluctant to ask for money?

- Fear of rejection
- Fear embarrassment
- Concern about payback

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# *Solicitation: What is Fundraising?*

## A Transaction...

- A donor exchanges something of value (usually money)
- A charity provides tangible and intangible benefits in return

## ...or a Relationship?

- Donors and nonprofit organizations work together to achieve common goals in service to the greater good

# *Solicitation: Shifting Assumptions*

## This

- Engaging
- Inviting
- Developing a giver
- Based on valuesu
- Aspirational
- Assume generosity

## Not this

- Persuading
- Selling (*or begging*)
- Getting a gift
- Based on value
- Fulfilling a need
- Assume scarcity

# *The Fundraising Process*



# Who Does What?

	Volunteers	Staff
Identification	Identify Evaluate	Research, compile and maintain lists Facilitate volunteers
Cultivation	Contribute to strategy Provide linkage	Develop and monitor strategy Manage logistics
Solicitation	Create the opportunity	Provide tools
	Determine in advance who will extend the invitation	
Stewardship	Personal thanks	Acknowledge Communicate

# *Solicitation: How to Ask for a Major Gift*

- **Part I: Before you call on a prospective donor**
  - *Make your own gift first.*
  - *Be able to make the case.*
  - *Develop a strategy.*
  - *Schedule an appointment and meet in person.*
  - *Don't go alone.*

# *Solicitation: How to Ask for a Gift*

- **Part II: When you call on a potential donor**
  - *Listen, listen, listen*
  - *Be specific about the request*
  - *Emphasize pledges when appropriate*
  - *Be clear about what comes next*
  - *Deal with objections/barriers*
  - *Accept any answer graciously*
  - *Thank, thank, thank.*

# Upcoming Opportunities

	identify	cultivate	solicit	steward
Women of Achievement		✓	✓	
Anniversary events	✓	✓		
Club 1886			✓	✓
Leadership luncheons		✓		✓
Personal introduction/ advocacy/building tours	✓	✓	✓	✓
Facebook “friend,” e-news, newsletter, etc.		✓	✓	✓



*Questions?*

# *Benefactor Group*

*Serving those who serve the common good©*

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