



## Fundraising Basics For All Staff

October 8, 2009 – Dakota Fall Staff Conference



## Storytelling With a Purpose

### “Our” Hopes



- Storytelling and Philanthropy
- Critical Aspects for Financial Development in the YMCA
- YMCA Best Practices
- Donor Centered Development
- The Case Is Critical
- Asking

## Who Are We?



- The Group?
- YMCAs and Programs
- Why is this Important?

## The Curb



## Dob



## What's Your Story?



- Why the YMCA?
- How Do You Tell Your Story
- Looking for Openings



## Your Story...Others' Stories Truman....

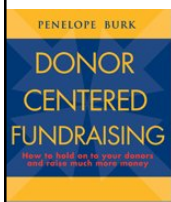


## What About Challenging Times?



- Three Things:
  1. Having confidence that people will give (so we are willing to ask without apology).
  2. Knowing the right reasons to ask (having a case for support that resonates with the donor).
  3. Asking the right people in a meaningful way.
  
- Fundamentals – Best Practices
- Concentrate on Donors Closest
- Over Communicate
- Go Overboard with “Thank-You”

## Best Practices (YMCA Exchange)

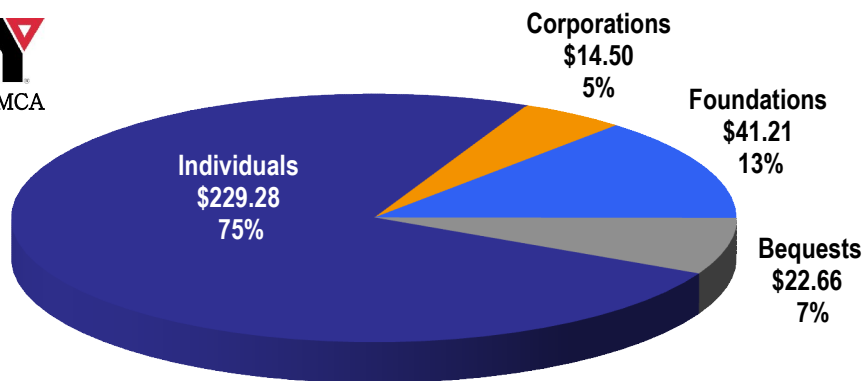


- Mission impact as a compelling case for support.
- Board prioritizes and demonstrates philanthropy
- Staff culture of philanthropy
- Preferred charity
- Donor-centered development program
- Infrastructure for cultivation

## Giving USA

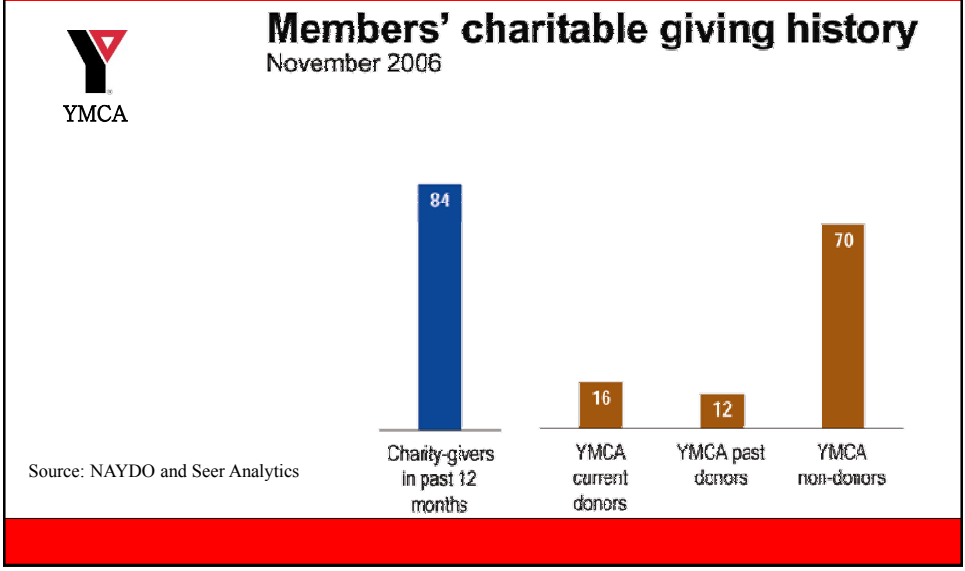
2008 charitable giving

Total = \$307.65 billion (\$ in billions)

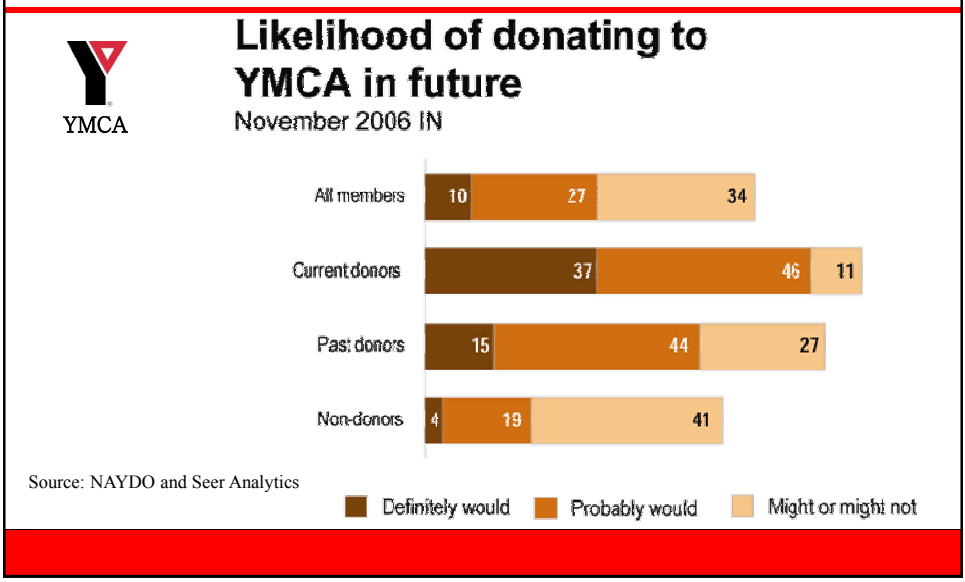


Source: Giving USA Foundation™ / Giving USA 2009

## What Do We Know About Our Members?



## What Do We Know About Our Members?



## The Donor Is Queen (King)



- What is Donor-Centered Development?
- More than an ATM!
- How Have You Engaged Your Top Prospects?
- How are You Thanking Donors?
- Character Development and Donor Development.

## The Case Is Critical



- What did my last gift do?
  - Specific
  - Measurable
- Powerful Case
  - 1-2 priority programs
  - Measurable outcomes
  - Not need, but excellence
  - Future based
  - “Elevator Speech” – 15-20 words  
(blackberry screen)

## Volunteers & Relationships

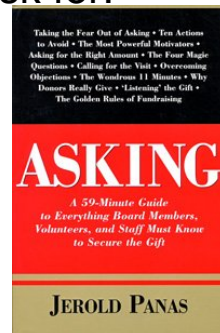


- TRUST
- Leadership Volunteer as a Symbol
- Role of the Board
- Why Volunteers Hesitate
  - Fear of Failure (minor)
  - NEW: Awkward when “Can’t” is raised
  - Lack of Preparation
- Volunteer Training
- People Give to People

## Asking...



- The Best Laid Plans....
- YMCA Donors – “loyal, but muted”
- You usually get what you ask for.
- Targeted Asking
- Asking for Double
  - 25-40% doubled gift
  - 40% gave more, but not double
  - 10% didn’t give



## A Typical Visit



- |  |               |
|--|---------------|
| <b>1. OPENING</b>  | 5-10 minutes  |
| Greeting   |               |
| Establishing Common Ground                                 |               |
| Establishing Credibility                                   |               |
| Thanking for Past Involvement                              |               |
| Getting Attention  |               |
| <b>2. PRESENTING THE CASE</b>                              | 5-10 minutes  |
| Target Their Interests & Passions                          |               |
| <b><u>LISTEN</u></b>                                       |               |
| <b>3. ANSWERING QUESTIONS</b>                              | 10-15 minutes |
| <b>4. CLOSING</b>  | 5-10 minutes  |
| Offering Pledge/Payment Alternatives and Investments Ideas |               |
| Facilitating Decision Process                              |               |
| Asking for the Gift  |               |
| Thank You  |               |
| Follow Up  |               |

## A Typical Visit



“Hearing about your interest in helping the YMCA (*specific case-based information*), I am hoping you might consider joining me in making a gift of \$1,000 between now and the end of the year. We can set up a recurring payment of \$100 per month if that would be most convenient.”

AND THEN WAIT.....

## What 13 Things Do Volunteers Need?



- 1) **What is the YMCA raising money for?**  
Limited Case for Support
- 2) **What does a “good” ask look like?**  
Role Play
- 3) **Where do I start? Which donors should I focus on and how can I prioritize my list?**  
Best Prospect First
- 4) **How much should I ask the donor for? How do I know that this is the right amount?**  
Donor Research & Appraisal
- 5) **What else should I know about the donor before going in?**  
Staff Help Make Connections
- 6) **What strategies are most effective in building a relationship with a donor? How do you know when a donor is ready to make a gift?**  
Volunteers Training Volunteers

## What 13 Things Do Volunteers Need? (continued)



- 7) **What are the best places to meet a donor? How to set an appointment and what to do if you can't get an in-person appointment**  
Don't just “run into” prospect. Model in Recruitment
- 8) **How much am I expected to raise in this campaign?**  
Goals at the Volunteer Level
- 9) **Who can I go to for help?**  
Staff Assigned to Each Team/Division – go along on calls.
- 10) **What information should I record?**  
How to Complete Forms
- 11) **Who do I report to?**  
Volunteer-to-Volunteer Hierarchy
- 12) **What is the worst that could happen and how would I deal with that scenario?**  
Provide Examples and Response, E.G. “I CAN'T give...”
- 13) **Why is it important to follow-up with a donor? What should I say when I follow up?**  
Doing What We Say We're Doing

## Resources



- YMCA Exchange
  - Red Book
  - Green Book
- NAYDO  
([naydo.org](http://naydo.org))
- Chronicle of Philanthropy  
([philanthropy.org](http://philanthropy.org))
- Cygnus Research (Penelope Burke)  
([cygresearch.org](http://cygresearch.org))
- National Philanthropic Trust ([nptrust.org](http://nptrust.org))

## Contact Information



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