



About Me

Trained fundraiser

Board consultant

Board member

Volunteer

Super Mom

Native New Yorker

Purple Lover

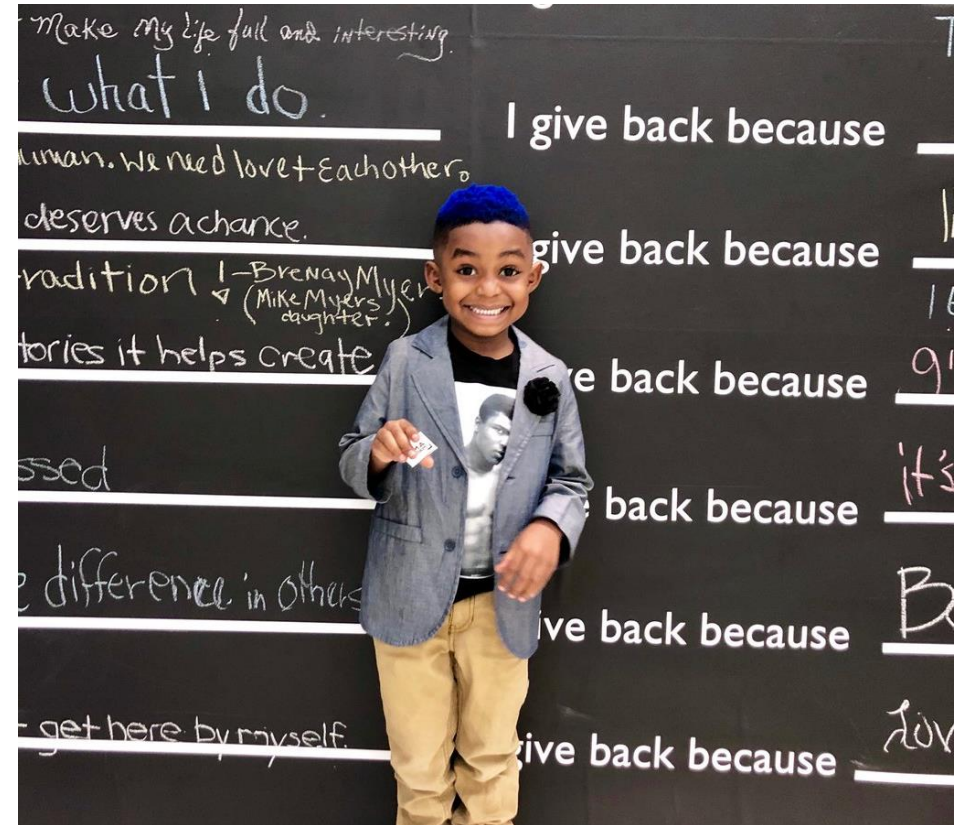
Snickers Junkie

Believe in
Abundance



The Truth About Fundraising Today

- Giving is up. And all signs are that it will remain up
- Donor fatigue is a myth – donors are not tired of giving
- If your organization invests in fundraising it will see solid returns
- New respect for digital strategies in the major gift world
- Fundraising continues to become more sophisticated
- Giving Days just keep getting stronger and stronger
- The face of philanthropy is changing



More Trends



Virtual events are here to stay.

Recurring giving will be more important than ever.

Nonprofit and for-profit connections will continue to get stronger.

You need to meet your supporters on their turf. Small donors excelled!

Remaining nimble is now a strategic imperative.

Purpose of the Annual Development Program

Offers donors opportunities to give to something that is meaningful to them several times a year, year after year

Allows nonprofits to increase the number of supporters, the number of gifts and the amount of gifts each year

Allows for predictable cash income at targeted times in the year

Allows us to creatively identify new individuals to invite into our stories and engage with the work of our nonprofits

Organized around financial and qualitative goals and objectives

Elements of A Successful Plan Remains Unchanged



- A good story
- Confidence in Leadership
- Sources for New Donors
- Donor Relations and Stewardship
- Relevant Channels for Solicitation
- Sufficient Resources for Fundraising
- A Workable Calendar with Deadlines and Accountability

Stay Focused On Mission

Revisit

your Case for Support and embed it with new language in all of your communications

Include

the impact your organization has made and continues to make, Infographics, impact reports, dashboards

Tell

compelling stories that emote empathy and inspires action

Blog

about how the organization is responding and adapting to keep the organization operating and moving in crisis mode

Share

client testimonials in writing, with pictures, and videos

Know New Metrics



Virtual Visits



Team Video/Email
Messages



Videos/Photos
from Events



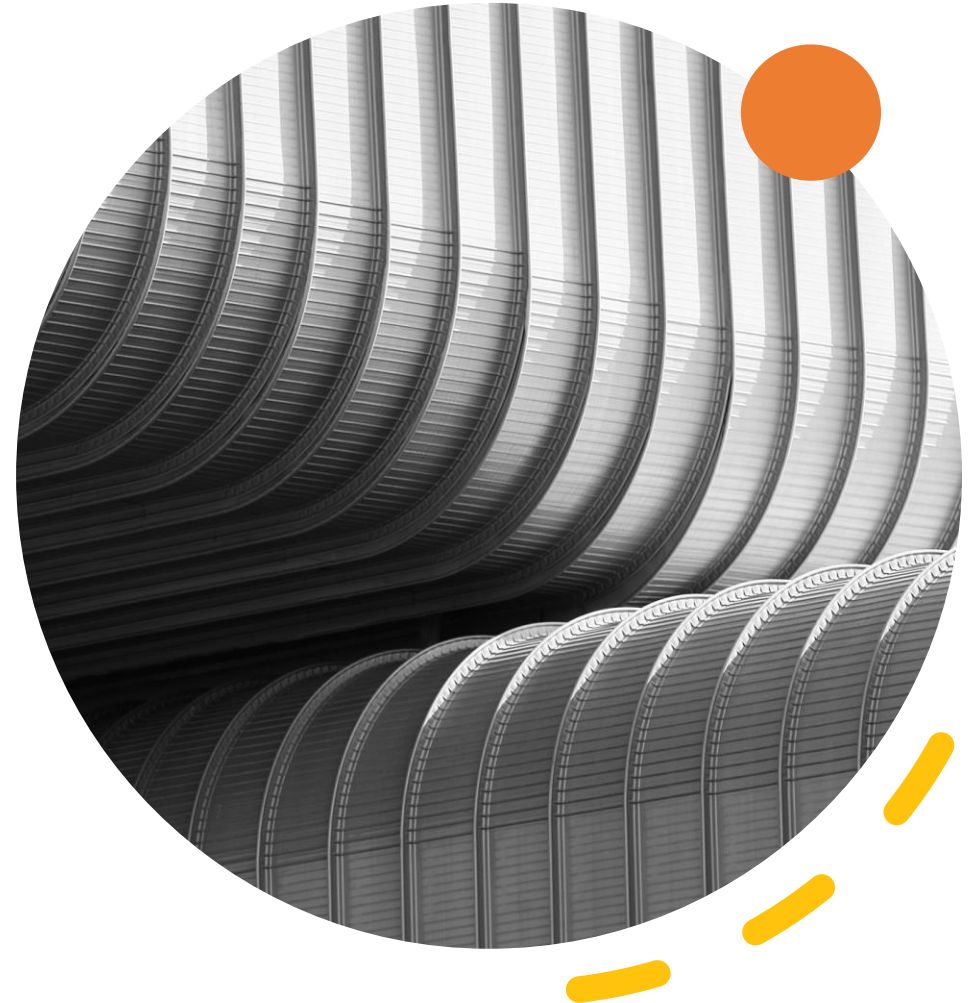
Stewardship
Touches



Social Media
Posts



Content Creation



Tell Compelling Stories

1

Pick topics on the forefront of everyone's mind now

2

Build a list or story bank of articles and videos you know will resonate with people now

3

Use these stories for connection, stewardship, and future solicitations

4

Work with your digital team to share the content online to build awareness and engagement

Know Digital Fundraising Trends

- Mobile optimization - mobile traffic continues to outpace desktop and tablet traffic. Make your website mobile-responsive
- Recurring Giving Options have increased by 17% in 2020. The average recurring donor will give 42% more in one year compared to a one-time donor
- Peer-to-Peer - Great way to leverage existing relationships to help raise funds quickly and easily. Empower donors to help fundraise on your behalf
- Facebook Ads - Set when you want to run your ads and hone in on your targeted audience. Facebook ads are customizable and work with any budget.

HOW TO SUPPORT your favorite nonprofit WITHOUT DONATING ANY MONEY

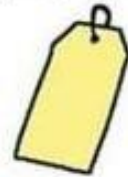
@khuufoundation

SHARE
THEIR
POST



LIKE
THEIR
POST

TAG A
FRIEND



SPREAD
THE
WORD



COMMENT
AN EMOJI

SHOUT
THEM
OUT



COMMENT
SOMETHING
NICE

VOLUNTEER
YOUR
TIME

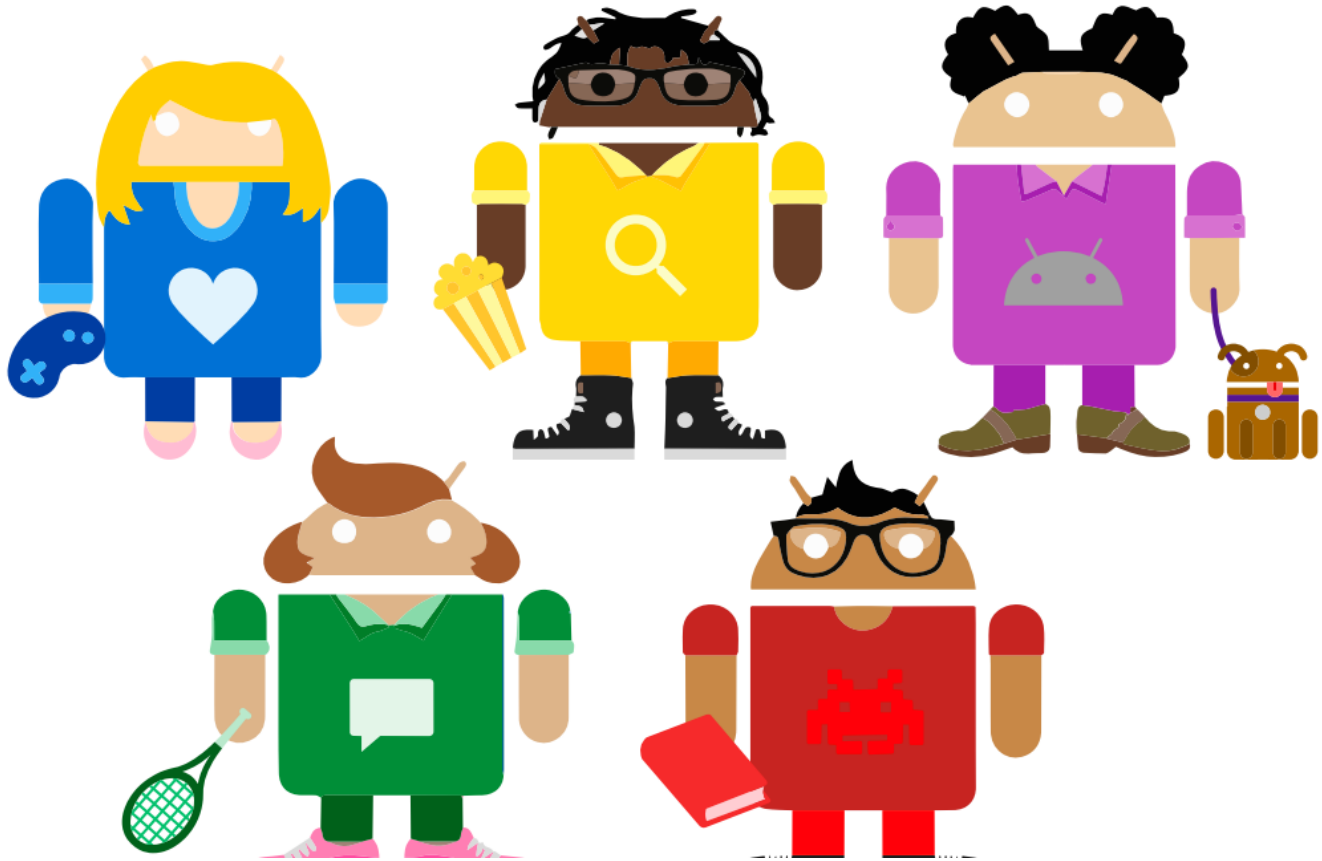


DONOR RETENTION

LOVE THE ONE YOU'RE WITH

Invest In One-On-One
Outreach

Just like Major Gift Officers, the Annual Development Team should also engage in as many one-on-one conversations as possible with annual donors (prioritize first with volunteers and then loyal donors with phone conversations, messages on social media and surveys)



Gen Z
Women
Donors of
Color

Segment Your Donors

Segment Your Donors Gen Z



AKA
"Philanthrokids"



THEY'LL
MAKE UP **40%**
OF ALL CUSTOMERS³⁰



26%
OF THOSE
AGED 16-19
VOLUNTEER³¹



60%
WANT THEIR
WORK TO MAKE
A DIFFERENCE³²



76%
ARE
WORRIED
ABOUT THE
PLANET³³



30%
HAVE ALREADY
DONATED TO AN
ORGANIZATION³⁴



JUST OVER
1 IN 10
WANT TO START
A CHARITY³⁵



PREDICTED TO
PREFER MOBILE
APPS FOR GIVING³⁶



Segment Your Women Donors

- Women, regardless of wealth, outpace men at similar income levels when it comes to charitable giving
- 64% of all charitable donations are made by women
- 93% of wealthy donors to women's and girls' funds are female
- 75% of millennial women give because of empathy (crowdfunding and work place fundraisers more than baby boomers)
- Super involved in board service and volunteering –"go all in" integrated into their lives
- Giving Circles are attractive options



Segment Your Asian Donors

- 60% of donors are female
- 40% have a college degree
- 43% have a post graduate degree
- Most technologically connected and willing to use alternate giving channels
- Plan and research giving in advance
- Emergency relief is a great motivation for giving
- Give to health (36%) and children's organizations (35%)

Segment Your African American Donors

- 14% of US millionaires with \$1 million dollars of cash on hand are people of color
- Two thirds of African American households give to charity and yet 48% report household incomes below \$50k per year.
- More than 30% give because of family tradition and to support their unique heritage and tradition
- 41% report plans to increase their giving in the next 3-5 years.
- Many give because of the trust relationship they have with the person asking.
- One in five say they would support more organizations if asked more often.





Segment Your Latinx Donors

- Largest minority in the nation with more than 50 million Latinos in the United States, with projections to be 106 million by 2050
- Many nonprofits neglect Hispanic donors, which accounts for lack of participation in conventional forms of philanthropy (Cortes 2003.)
- Hispanics are under-represented on nonprofit governing boards (Seaworth 2016.) Data found national average Hispanic board representation was 3.5% Cultural traditions of informal mutual assistance are common in Latino/Hispano tradition; yet, professional fundraising has not yet translated that into engaging these constituents
- 63% of Spanish speaking households gave to charity in 2015 (Norris 2016)
- Blackbaud's 2015 *Diversity in Giving Study* found that Latino households primarily give to places of worship, children's charities, and health, but that the majority of giving is informal rather than directed to organized nonprofits.




Recognize the Localization of Philanthropy

- More ordinary people came together in the spirit of solidarity to engage in mutual support to protect the most vulnerable in their community
- US households prioritized giving to meet the pressing needs of those in their area.
- Environmental, education, arts and culture organizations are least likely to get gifts while giving for social services remains steady.
- Organizations not providing direct COVID-19 relief must communicate effectively with donors regarding the interconnectedness between their missions and the challenges we are all experiencing
- COVID-19 has driven a surge in “localism” around the world, bringing increased attention to pressing needs within our communities and the responsibility to take care of one another.



Donor Care Plan

Month	Strategy	Method	Idea	Action	Resources	Who	Cost
Jan	Stewardship	Email	HNY E-Card	Order cards	\$\$ to purchase	Dev Dir	
Feb	Exposition	Web, email	Report/video	CEO video	\$\$ for video	Dev Dir	
March	Impact	Social Media	Story/Volunteer	Write story	SM platforms	Marketing	
April	Stewardship	Virtual	Vol App Event	Plan event	Zoom	Dev Dir	
May	Stewardship	Phone calls	TU 4 Giving	Make calls	Script	DD/ Marketing	
June	Stewardship	Direct Mail	Trinkets mailed	Order trinket, envelopes	\$\$ for trinket, postage	Dev Dir	
July	Impact	Direct Mail	Notes from board or FELT	Prepare notes	Note cards, postage	Dev Coord	
August	Impact	Email	Invite to Town Hall w/CEO	Get invites out	Enticing language	Marketing	
Sep	Stewardship	Email	Back To School	Content	Campaign	Marketing	
Oct	Ask	Email, SM	GivTues launch	Create/camp	Committee	DD/Committee	
Nov	Stewardship	Email	Ecard	Order/Mess	\$\$ for cards	Dev Dir	
Dec	Ask	Direct, Email, SM	 Holiday mess	Mess/CEO	Holiday logo	Dev Dir	

Prioritize Authentic Stewardship



Stewardship and donor relations needs to be at forefront – connect with them like family



Nurture relationships, check in with donors, ask about health and well-being



Treat fundraising like a relationship business, not a transactional one



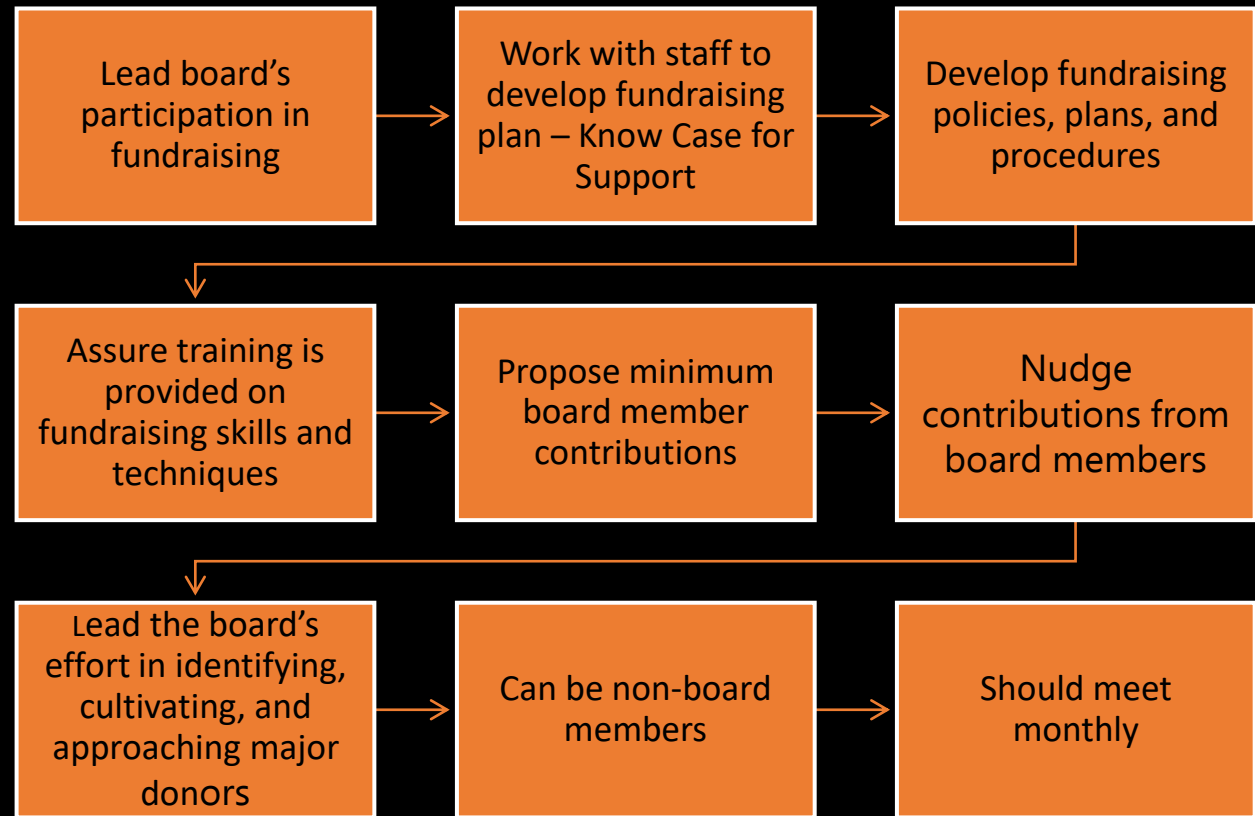
Thank donors for their support, show them how their invested funds are being put to use during this crisis



Take donor stewardship segmentation to the next level. Thank them by sharing stories that align with their interests.



Put the Board Fundraising Committee to Work



Know Roles In Annual Development Planning



Board Members	Staff	Volunteers	Donors
Post on Social Media	X	X	X
Author a letter		X	X
Write thank you notes	X	X	X
Send thank you videos	X		
Stuffing parties	X	X	X
Attend events	X	X	X
Ask networks to give	X	X	X

Create an Annual Development Calendar

January	February	March	April
Happy New Year emessage Lapsed Donor Appeal Board Day of Giving Challenge	Happy Valentine's Day Black History Month Calls to Lapsed Donors	TU calls to monthly donors Get To Know Your Donor Survey	Spring Day of Giving Volunteer Appreciation Event
May	June	July	August
Happy Mother's Day Graduations/Memorial Day Mental Health Month Annual Report on website	Mid Year Appeal and Video We Serve Family Walk	TU calls to monthly donors Happy Hour Brewery Event	Back to School Fall Video Featuring a loyal donor Call for Volunteers for Gala
September	October	November	December
Virtual Town Hall with CEO and HNWD donors Hispanic Heritage Month	Gala Event Breast Cancer Awareness Month	Giving Tuesday Thank-A-Thon Thanksgiving Message	Year-End Messages Happy Kwanzaa

Don't Forget Year-End Giving



01

A strong year-end push can set your organization up to start the next year stronger than ever

02

Reinforce your message with multiple appeals. It takes 2-3 exposures of your message for a person to make a decision

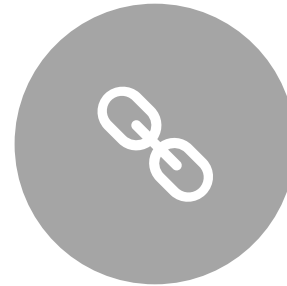
03

Schedule text messages for consistency. Include metrics on your donation page so donors can see how their gifts are being used

Use a Communication Plan For December



December 3 Direct Mail
(Christmas/holiday) (Ask)



December 10 Social Post
(Video Link) (Ask)



December 24 Text (Ask)



December 31 Email and
or Social Media (Embed
Image or Video) (Ask)

Don't Be Afraid To Ask For What You Need

Be sensitive but
not timid. Know
what you need
and ask for it

Create tactful
solicitations for specific
program needs and staff
support

Modify Days of Giving or
pre-virus fundraising
campaigns based on current
and caused based needs

Embed ways
to stay
engaged in
external
messaging

How 2020 Changed the Future of Fundraising

- No matter what season we are in, no matter what kind of crisis we are facing, your donors want to know that you are making an impact. Show them how your work has changed, positively and/or negatively, since the pandemic flipped the world upside down. **Julia Campbell, Social Media Strategist**
- As time goes on, I predict we will see many more major gift solicitations performed virtually. This will happen once we are on the other side of COVID because donors want to save travel time, save organizational resources, and in many cases convenience. **Ryan Woroneicki, VP Strategic Partnerships, Donor Search**
- We're at a turning point - not just in terms of before and after the pandemic - but also in terms of race relations and understanding what equality really means. I think we'll start seeing a lot more nonprofits really taking a hard look at how they center the communities they serve in their fundraising and marketing materials, and hopefully begin to see the end of white supremacy culture in nonprofits. **Karen Hopper, Senior Data Strategist at M+R**
- If 2020 has taught us anything, it's that nothing is predictable. Pivot and adapt to the new normal. **Sara Hoshooley, Founder of Charity Shift Consulting**



FUNDRAISING
IS MINISTRY
HONORING THE VOCATION
OF ASKING & GIVING



Moderated by
Christal M. Cherry,
The Board Pro

Friday, April 23, 2021

2pm EST
Cost \$20

REGISTER ON EVENTBRITE

www.theboardpro.com



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Senior Pastor,
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Juanita Sheppard, M.Div, CFRE,
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CEO, Wanda Scott
& Associates



Marc Pitman
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