



Mastering the Fund Development Process
Sponsored by OCCUR
With Kim Klein

KLEIN & ROTH CONSULTING
Real money. Real people. Real change.

Goals for our time together

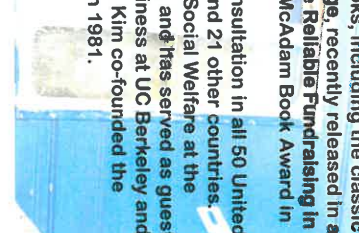
Participants will build on their skills to:

- Develop long term fundraising strategies
- Create a profile of a prospect
- Identify new prospects
- Expand their Fund Development Plan
- Continue to be more comfortable asking for money
- Have fun

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About the Presenter

Kim Klein is the author of five books, including the classic text, **Fundraising for Social Change**, recently released in a SEVENTH edition. She also wrote **Reliable Fundraising in Unreliable Times**, which won the McAdam Book Award in 2010. She has provided training and consultation in all 50 United States, five Canadian provinces and 21 other countries. She is a lecturer at the School of Social Welfare at the University of California, Berkeley, and has served as guest faculty at the Haas School of Business at UC Berkeley and Concordia University in Montreal. Kim co-founded the Grassroots Fundraising Journal in 1981.



People Who Give:

- ▶ **Most people:** 70% of adults give away \$\$
- ▶ Give to 5-10 organizations each year, most of which are fairly similar.
- ▶ Equal numbers of men and women.
- ▶ # 1 reason people make a donation: someone asked them.
- ▶ #1 reason people don't give: they say they were not asked.

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Move into an "EXCHANGE" Frame

Go from this:
"Please, please, please..."



To this:
"I think you would be interested..."



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Make Sure Every Entry Point Invites a Donation

If I found out about your organization from

- your website,
- your e-newsletter
- a friend
- a special event
- dropping by your office



Would I know that you raise money from people like me?

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Evaluating your Relationship Building Efforts

1. We invite people to make their first gift through: *(ie events, direct mail, door to door, on-line)*
2. We invite people to give a second, third, fourth gift by: *(ie thank you notes, newsletter, fall appeal, gala)*
3. We ask people to consider increasing their gift by: *(ie upgrading campaigns)*

Donors are on a Trajectory "This is one of the organizations I support"



"I like this organization a lot"



"This is one of my top three giving priorities"



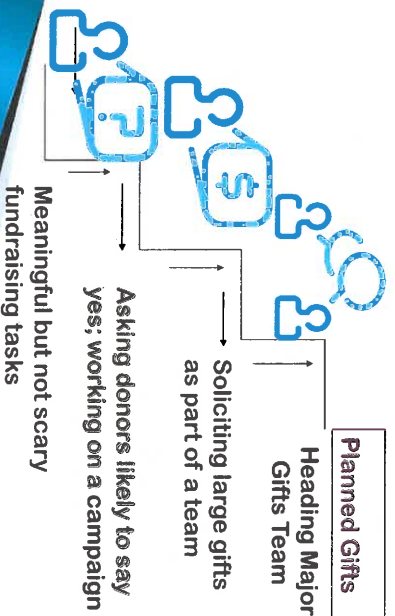
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Know What You Need to Raise



Build a Fundraising Team



A Simple Chart

Goal: \$50,000

# of gifts	size	# of prospects*
2	\$5000	8
4	\$2500	16
10	\$1000	30
20	\$500	40
40	\$250	80

76 gifts X 2 = 152 prospects

* You will need 2 times the number of prospects as the number of gifts

Every Fundraising Team Needs:

- ▶ A way for everyone to participate. Some:
 - ▶ will ask for money and some won't
 - ▶ love events, and some don't
 - ▶ enjoy working alone, others in teams
 - ▶ prefer approaching strangers
 - ▶ prefer working with institutions
- Who are you?
- Is your team balanced amongst all the styles?

Every Team Member Should be Able To:

1. State a one sentence, easy to remember mission or vision statement
2. Name three important accomplishments from the previous year
3. Name three goals for the current year
4. Know the total budget and some budget detail
5. Talk about how the organization raises \$.

What Are Your Challenges?

We do these things very well:

We do these things adequately:

We need to improve:

This is what we will focus on:

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Identify Triple A Prospects

Access:

Prospect knows you or someone who knows you.

Ability:

Gives away money

Affinity:

Cares about this cause or something similar



Affinity for the Cause is Critical

Sounds great. I think it is fantastic.

I want to be part of this. Here is my gift.



I wish you well

I will give money

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Focus on Back end Requirements

- Send a thank you note within 72 hours
- Record the donation in a database
- Personalize whenever possible
- Send the donor information 3+ times a year: newsletter, Annual Report, special appeals, e-newsletter
- Maintain a social media presence
- Keep your website up to date

Simple Ways to Build Your List

The Lowly Business Card

Have them
Hand them out like candy
Take them from others



Build your email list



- ✓ Collect addresses on website, & from offline donors and constituents
- ✓ Plan for churn / unsubscribe rate of 19%
- ✓ Ask people to forward emails to their contacts
- ✓ Use social media: Run regular 'join our email list' asks and drives via Facebook, Twitter, etc.

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Signs Everywhere:

Name
www.goodcause.org

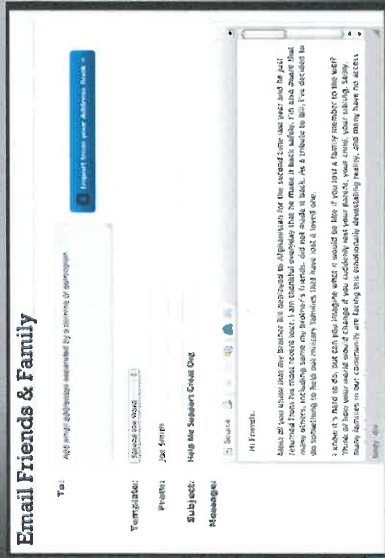


Visible signs



Signature on E-mail

Ask your Donors to Forward E-mails



Use Events Correctly

What are events for?

1. To get publicity
2. To increase visibility
3. To raise money (and not always)



Visibility Score

Of all the people who should know about you, what percentage actually do?



Who doesn't?
 What will they come to?
 What will attract them?

Monthly Donor Programs



Advantages of Monthly Donor Programs

- ▶ Create reliable year round income
- ▶ Take advantage of “donor inertia”
- ▶ Low processing costs
- ▶ Monthly donors give 42% more than other regular donors (source: Network for Good)
- ▶ Great way to upgrade donors
- ▶ Creates a great list of people who will volunteer or take other action



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Your Program Needs a Name

- Guardians of Liberty (ACLU)
- Humane Hero (Humane Society of the USA)
- Hope Builders (Habitat for Humanity)
- Conservation Champion (Nature Conservancy)



- ✓ Getting it started
- ✓ Keeping up with credit card expirations
- ✓ Thanking donors appropriately
- ✓ Segmenting properly
- ✓ Continuously marketing the program
- ✓ Transferring knowledge to new staff

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Sample Monthly Donor Pages

Become a Monthly Donor


Join Pipeline with a monthly donation and help keep the water flowing

<p>35</p> <p>Monthly Donation</p> <p>Starts with \$50</p>	<p>50</p> <p>Monthly Donation</p> <p>Starts with \$75</p>	<p>100</p> <p>Monthly Donation</p> <p>Starts with \$100</p>
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Not ready to get started?

[Learn More](#)

Focus on asking



A photograph showing three people in a meeting. A man in a dark jacket is seated at a table, looking at a laptop. A woman in a black top is leaning over the table, and another man is partially visible. The setting appears to be a modern office or meeting room with large windows in the background.

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Keep in Mind

1. Success is asking



A photograph of a man in a dark suit and tie, smiling and gesturing with his hands as if in conversation. He is looking towards the right of the frame. The background is slightly blurred, suggesting an indoor setting.

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2. Be OK with no



A photograph of a man and a woman in a meeting. The man, wearing a striped shirt, is seated and looking towards the woman. The woman, wearing a white top and a dark jacket, is leaning over a table and looking at a laptop. The setting is a meeting room with large windows.

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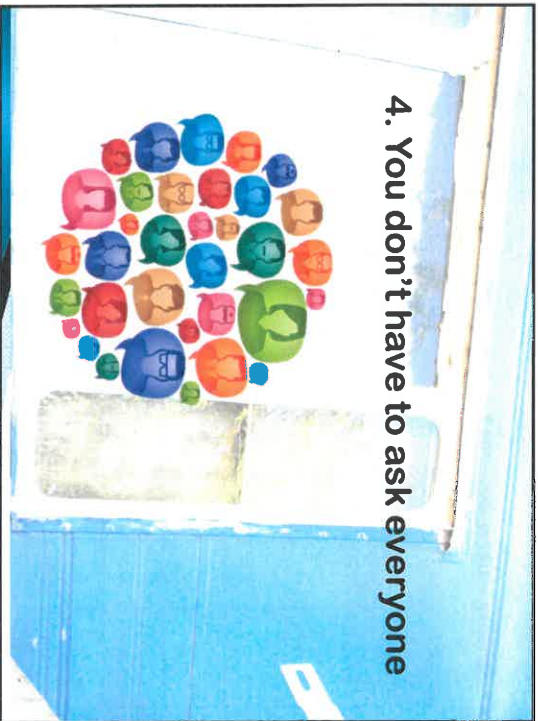
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**3. Focus on what you believe,
not what you fear.**



A composite image featuring a woman's face on the left and a circular sign on the right. The sign contains a photograph of a man in a blue shirt flexing his arm, with the text "HEALTHCARE IS A HUMAN RIGHT" around the perimeter. Below the sign is a small image of a pill bottle.

**LEARN
THE SIGNS
TO END
TRAFFICKING**



Preparation

Have ready:

- ▶ Stories
- ▶ Statistics, including comparisons
- ▶ Philosophical reasons why this is important
- ▶ Responses to common objections and questions
- ▶ Budget and fundraising success so far



Don't do all the talking...

Ask different types of questions:

- How did you first hear about us ?
- How long have you lived here?
- How is that donut shop that just opened?
- What is most compelling about this issue to you?

Tell Your Own Story

I got involved in this because....

The most surprising thing to me about this issue is....

I loved meeting people who have been giving for a long time because....

I have a dog, too....

Fundraising Plan for _____

January – December, 2017

STRATEGY GOALS	Audience or Prospects	WHEN	LEAD PERSON RESPONSIBLE	Role of Board	Comments

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What Are You Going to do Now?



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By June 1, we will:

Examples:

1. Do one on-line appeal
 2. Make sure that we always invite donations
 3. Expand our fundraising team
 4. Ask three people to increase their giving
 5. Set a goal
 6. Clarify our prospect profile
 7. Rethink our events
- Create your own plan. Make it reasonable.

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Helpful Resources from Kim Klein

Magazine and e-newsletter

Grassroots Fundraising Journal

www.grassrootfundraising.org

Books by Kim Klein

Fundraising for Social Change, Seventh Edition

Reliable Fundraising in Unreliable Times

<http://www.wiley.com/buy/119209773>

Sign up for our free e-newsletter:

<http://www.kleinandroth.com/newsletter-sign-up>

