

Intentional Fundraising for Small Organizations:

Building an Annual Plan

NAMMA Conference
Wednesday, August 14, 2019



Who do we ask?

- Current donors
- Local community
- Industry
- Trustees
- Volunteers
- Church community
- Foundations



How do we ask?

- Personal solicitations
- Special events
- Direct mail
- Newsletters
- Special campaigns
- Social media
- Grant proposals
- Unsolicited



Annual Fund

- **Purpose** - seek donations on a recurring annual basis for programs and services
- **Source** - everyone (all markets - individuals, corporations, foundations, churches)

Annual Fund

Functions & Benefits

- Ensures annual income
- Develops and expands donor base
- Identifies future sources of funding with giving patterns
- Maintains awareness of your work and value

Annual Fund

- Funds current operations
- Creates a habit of giving with donors
- Helps identify your most engaged supporters
- Provides the opportunity to educate supporters and prospects about your mission
- Stewardship

Annual Fund

What makes
it up?

- Revenue from Direct Mail
- Revenue from Special Events
- Unsolicited gifts made to organization
- Income from successful grants
- Legacy gifts
- Any revenue that supports general operating of organization

Annual Fund

Creating a plan

- Organizational budget – know your goal
- Create a gift chart to guide you
- Create a calendar with activity (direct mail, special events, social media posts, etc.)
- Quarterly reviews of financials with forecasting
- Engage your board (if you have one)
- Follow up: plan and schedule
- Thank donors (write personal notes, call)

Direct Mail

- Mailhouse vs.
in-house production
- Who do you send to?
- How often should you send?
- How do you manage costs?

Direct Mail

Purpose &
Benefits

- Renew annual support from current donors
- Acquire new donors
- Build constituency and broaden donor base
- Build awareness of your work & your brand
- Provide a source of income that is renewable and dependable

Direct Mail

How to get started?

- Set a goal
- Set a target delivery date
- Work backwards from target date to create a schedule and workplan
- Stick to your plan!
- Decide on a message or theme you want to focus on
- Evaluate past performance
- Use what you have and build from there

Direct Mail

How to get started

Consider

- Where is your list coming from?
- Are you using a mailhouse or producing in the office?
- If producing in-house, how much help do you have?

Direct Mail

Components

Envelope – First impression

- What will make someone open your letter?
- Color, size, message banner

Letter

- Create sense of urgency
- Clearly state your need and how your organization will meet that need
- Ask for specific amount based on past giving
- Call to action

Response Device

- Opportunity to ask if interested in monthly giving or planned giving

Direct Mail

The Letter

- Creates an interest – tells a story
- Creates a sense of urgency
- Connects with the audience
- Communicates a need
- Demonstrates how your organization is uniquely positioned to help
- Asks for something specific
- Includes a call to action
- P.S. is opportunity for final appeal

Direct Mail

What makes a good letter?

- Decide on a topic or a specific story or theme
- Edit yourself. You don't need to tell everything your organization does in one letter
- Be genuine
- Give specifics (not just stats)
- Tell how your organization will address the stated need
- Ask for something specific
- Let them know how they can be part of the solution

Direct Mail

The List

- Size of mailing, staffing and budget will determine if produced in-house or at mailhouse
- Target list vs. everyone
- Personalized vs. general
- Specific ask for specific donor

Direct Mail

The Targeted List

- Lapsed Donors
- First time donors to secure renewal
- Board of Trustees and former trustees
- Donors who have given at a certain level
- Local businesses

Direct Mail

Tips

- Proofread multiple times
- Tailor your message to intended audience
- Get the salutation correct
- Check your data
- Inspire confidence in the great work you do
- Don't be afraid to connect personally
- Evaluate the performance
- Be creative! It doesn't always have to look the same
- Timely acknowledgements

Conclusion

- There is no magic bullet in fundraising
- The only guarantee to fundraising success is to make a plan with activity and timelines and FOLLOW the plan
- Follow up! Follow up! Follow up!
- Evaluate the work ASK – if you don't ask, you will not get
- Be thankful and be sincere
- Schedule time to do the fundraising activity