



PRESENTS:

Securing More Donors & Dollars (with limited time & budget)

Network  for Good

Nate Nasralla, CFRE
Managing Director



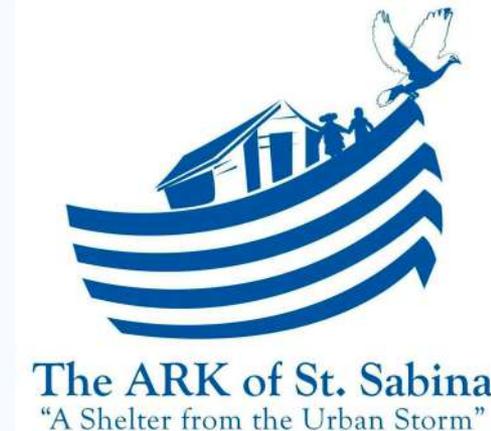


Creating Context



Jocelyn Jones

“Chief Everything Officer”



Today, we'll present and discuss:

-  Creating an impact-driven, donor-centric fundraising message.
-  Developing a right-sized fundraising goal & plan to engage board, staff & volunteers.
-  Incorporating easy, low-cost retention & cultivation ideas.

PART 1

Creating an impact-driven fundraising message
(that gets people to respond to you)

NEXT >



You need to cause an interruption, not just deliver a message. A donor should not only know why they are hearing from you, but anticipate the value of the information you are sharing.



Focus work, creative time to avoid procrastination



Create message that targets donors, not staff



Need to think in terms of characters, not pages



One message manifested in all channels



Make your mission and outcomes the headline(s)

Donors all make gift decisions differently and you must creatively integrate all of them

Rational Reasons (Head): "What I am being asked to do makes sense and I understand why it's important."

Emotional Reasons (Heart): "I identify with this mission and programs because I know someone who...and I want to help."

Transformational Reasons (Halo): "This is a big problem and I want to leverage my resources to fulfill the vision and change the world."

TEMPLATE

Your message needs to embrace the notion that donors give through your organization, not to it.

Donors are hiring you to do the good in the community they want to happen but don't have time to do, directly.

Always answer the question and when you do, become relevant, "Why is your mission important to me?"

The founder or the facility doesn't drive giving or retention, the mission and impact you make does.

TEMPLATE

Don't project your own metrics, needs or milestones into your message – they don't drive giving or retention.

“Our fiscal year ends...” and “Close budget shortfall of...” uninspire, unless your mission is to balance a budget.

“If everyone participates with a gift of...” only demonstrates you can do math, not fulfill the promise of your mission and program.

Opportunity for to create and sustain immediate program impact creates urgency, not months calendar.

TEMPLATE

Tell the story you want donors and prospects tell their friends – that's what matters.

Quantify impact and opportunity, create your Needs Target with three, concentric circles.

Tell a story about someone who benefits from your mission instead of just articulating what you need.

Tell donors and prospects what they become after they support your mission and programs

TEMPLATE

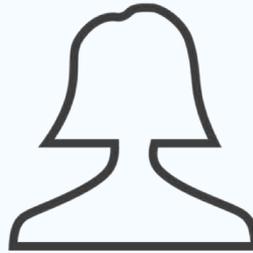
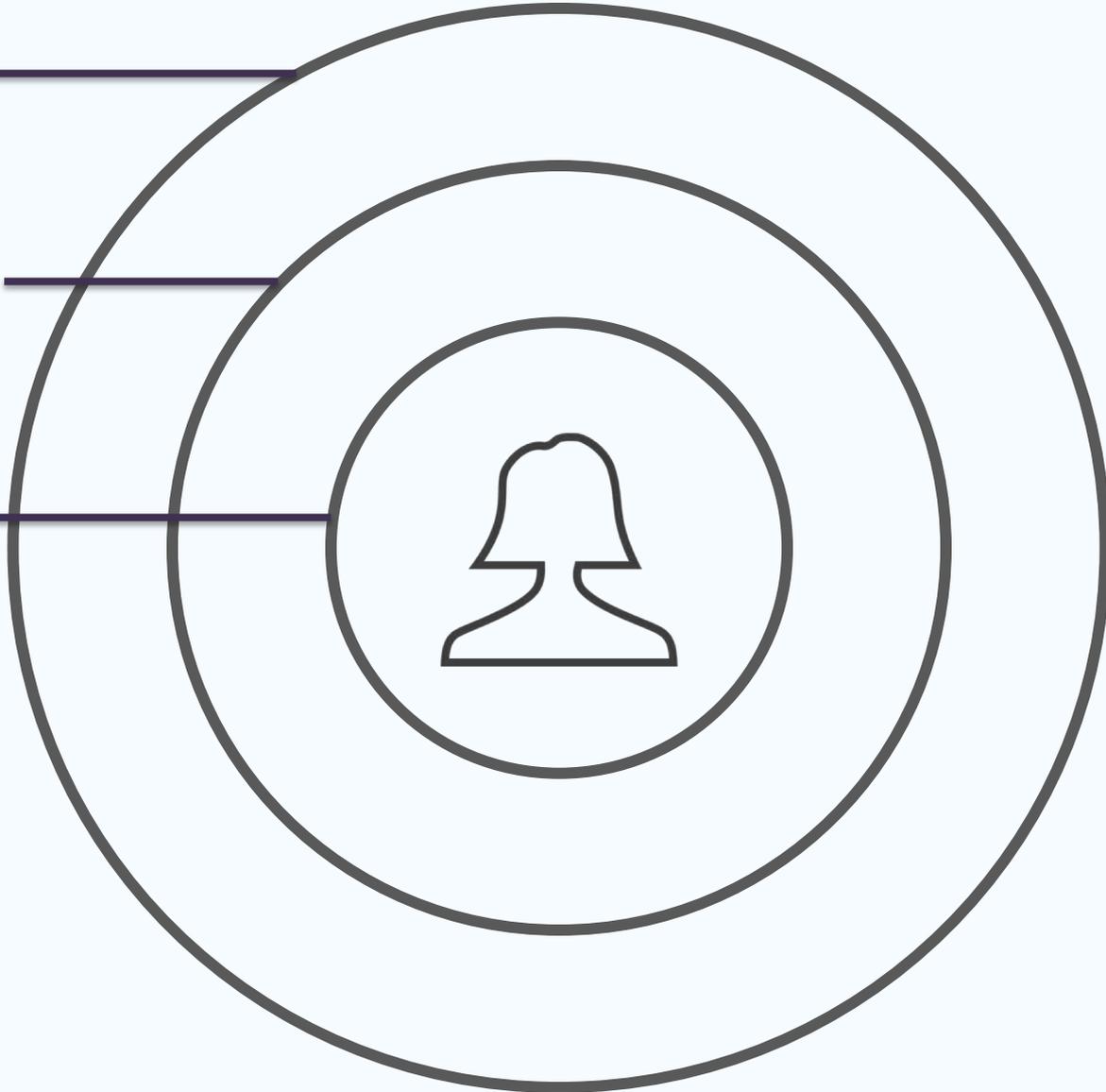
Total



Target



Past



Tax deductibility is already a known fact and it doesn't drive most giving

Only .008% of donors who give gifts under \$1,000 report doing so in order to get a tax deduction

Reminding donors and prospects of deductibility wastes precious communication real estate to communicate impact

Talking about it implies you believe it's important and what motivates people to support your mission.

TEMPLATE



What do you need to know?

Create one message that targets donors – not staff –
and can be leveraged across all channels, content,
and is counted in characters.

PART 2

Creating a right-sized goal, plan, and recruiting buy-in from board, volunteers, and others



Aligns resources around what's possible & what works.



Allows you to begin managing, not just reacting.



Focuses and motivates a board, volunteer base.



Instills confidence to existing & will-be funders.



Provides structure to ideation & planning.

NEXT >

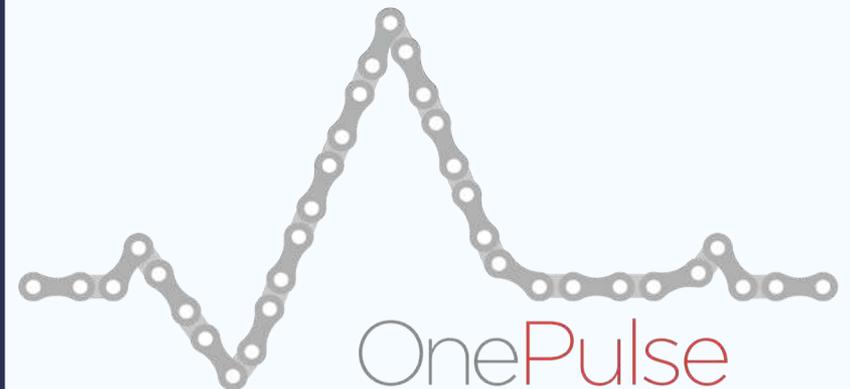


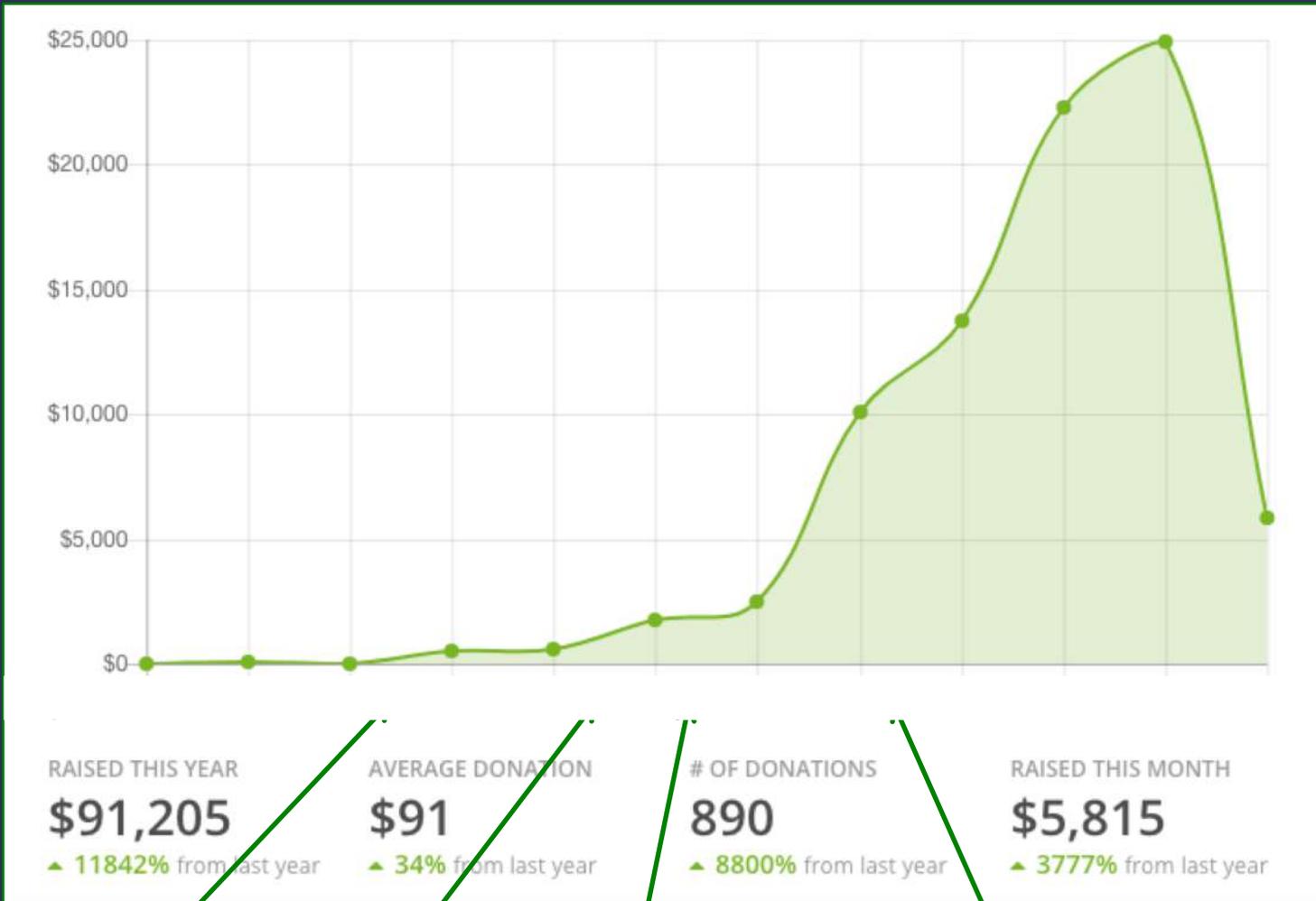
The Value of a Plan



Eric McQuesten

“Chief Everything Officer”





Plan Creation

Board Training

P2P Training

Giving Campaign



**How Did
He Do It?**



OnePulse 2017 Fundraising Plan

\$

Monthly Communications Framework

Individual Donors	Strategy	Number to be Solicited	Average Gift	Estimated Income	Associated Expenses	Net Income	Completion Deadline	Responsibilities
Renewing annual donors	Spring Renewal Campaign w/ donor upgrade strategy - these are donors that haven't given in 300 days. Factor 70% renew at existing level.	215	\$79	\$11,890	\$50	\$11,840	3/1/2017 - 4/30/2017	NFG: Edit campaign message w/ appeal materials, create segmentation rules & level to asks, develop call/thank-you script. Eric: Write message/content emails, create donor lists in CRM, make outreach calls to past donors, send emails/communications, cult match.
Current annual donors	Spring Renewal Campaign, factor in 1/3 donors double down on gifts already made, at existing gifts level.	171	\$59	\$3,329	\$60	\$3,279		
Prospective annual donors	Spring Acquisition Campaign w/ matching gift strategy. These are donors without a donation record, factor 20% response rate, \$30 average gift.	349	\$30	\$2,618	\$50	\$2,568		
SEGMENT TARGET				\$17,836	\$150	\$17,686		
Major Donors	Strategy	Number to be Solicited	Average Gift	Estimated Income	Associated Expenses	Net Income	Completion Deadline	Staff Responsibilities
Prospective Major Donors	Identify and solicit 3 major gifts during summer months, after conclusion of annual campaign. Universe of 41 people who have given over \$200 total in last 2 years, with an average gift size of \$225. Shoot for target gift of \$300.	41	\$225	See Gift Table below with projection, based on existing 41 contacts giving over \$200 in last 2 years.			5/1/2017 - 9/30/2017	NFG: Develop gift levels, prospect selection, gift proposal & pledge forms. Eric: Send outreach, conduct thank-you's, hold cultivation meetings.
	Lead Gift	1	\$1,500	\$1,500	\$200	\$1,300		
	Major Gifts	5	\$500	\$2,500	\$100	\$2,400		
	Mid-Level Gifts	10	\$300	\$3,000	\$100	\$2,900		
SEGMENT TARGET				\$7,000	\$400	\$6,600		

Month	Date	Message	CTA	Owners
May	16-May	Hear Stories from Eric's Scouting Trip, The Needs in Malawi, Expedition Planned	Join Facebook Live Event	Joe - Content Eric - Send
	17-May	Facebook Live Event	---	Eric - Host Event/Speak
	30-May	Hear from Eric and OnePulse Riders/Supporters - Recorded Video	Watch Video	Joe/Eric - Video Production Joe - Content Eric - Secure Quotes, Send
June	15-Jun	Hear from PIH's Chief Medical Officer & Others on the stories from Malawi	Read Update	Joe - Content Eric - Secure Quotes, Send
	30-Jun	Join OnePulse's Expedition, Give Now before the team departs for Malawi	Give Now	Joe - Content Eric - Secure Quotes, Send
July	15-Jul	Get an update from the team in Malawi - sights, sounds, and more.	See Expedition	Joe - Content & Send Eric - Provide Images from Malawi
	30-Jul	Final stretch of Expedition in Malawi - what's been accomplished so far	See Expedition	Joe - Content & Send Eric - Provide Images from Malawi
August	15-Aug	Hear Stories from Summer's Expedition, Needs in Malawi, Work Accomplished	Join Facebook Live Event	Joe - Content Eric - Send
	30-Aug	OnePulse vision for rest of 2017	Read Update	Joe - Content Eric - Secure Quotes, Send
September	15-Sep	Update, your gifts at work, new success stories from OnePulse Community	Read Update	Joe - Content Eric - Secure Quotes, Send
October	15-Oct	Update, your gifts at work, new success stories from OnePulse Community	Read Update	Joe - Content Eric - Secure Quotes, Send
November	15-Nov	Update, your gifts at work, new success stories from OnePulse Community	Give Now	Joe - Content Eric - Secure Quotes, Send
December	15-Dec	Update, your gifts at work, new success stories from OnePulse Community	Give Now	Joe - Content Eric - Secure Quotes, Send

Spinathon Save The Date	Date	Task
	March 20th	Select Banner Image
	March 21st	Combine Image & Content into DMS Email
	March 22nd	Draft Ticket Levels for Spinathon Swag
	March 23rd	Create Event Page in DMS for Spinathon
	March 24th	Link Event Page to Email
	March 25th	Send Test Email to NFG
	March 28th @ 9am PST	Schedule email to ALL Contacts

- GOALS & OBJECTIVES**
- 1) Transition historic rider & donor relationships to OnePulse, the organization, rather than partners or other people.
 - 2) Create monthly, consistent engagement, outside of one-time or one-month expeditions and campaigns.
 - 3) Develop a warm base of donors for more successful appeals and fundraising activities.
 - 4) Further refine the OnePulse message to clearly presents its brand and mission.

Spinathon Reminder/Head's Up Email	Date	Task	Owner
	March 30th	Select image of Malawian kids from PIH	Eric
	April 1st	Overlay campaign text onto image	Eric
	April 1st	Create list of all contacts	Eric
	April 3rd	Draft email in NFG DMS with CTA: "Give Now" (Give Eric a head start)	NFG & Eric
	April 4th	Send Test Email to NFG	NFG
	April 5th	Schedule email for morning of Spinathon	Eric
	April 7th @ 9am PST	Email Sent!	Eric

HEADER IMAGE

Before you get your day started, you can make it great day for someone else.

We are already fighting this morning.

Before sunrise, we were awake, setting up Eric's bike trainer on Santa Monica beach. Starting now, he's going to be riding nonstop for 12-hours, asking our community to join **OnePulse** in raising the resources to provide health-care to kids in Malawi, in desperate need.

Eric needs you, but thousands of kids need you more.

Already, generous supporters like you have given to **OnePulse**, to help our team serve more kids during our cross-country bike expedition for health-care in Malawi.

With a small gift, you can make a big difference in the lives of kids (and Eric's energy levels!).

[You too, can be a part of change, today.](#)

<<MAKE YOUR GIFT>>

Spinathon Day-Of Campaign Email	Date	Task	Owner
	March 30th	Select image of Malawian kids from PIH	Eric
	April 1st	Overlay campaign text onto image	Eric
	April 3rd	Create list of all contacts, removing anyone donating or purchasing tickets after MAR 28 email.	Eric
	April 4th	Draft email in NFG DMS w/ CTA: "Give Now"	NFG & Eric
	April 5th	Send Test Email to NFG	NFG
	April 6th	Schedule email for morning of Spinathon	Eric
	April 8th @ 9am PST	Email Sent!	Eric

Progress Update to Participating Contacts	Date	Task	Owner
	April 9th	Total \$\$ raised during Spinathon and online.	Eric
	April 10th	Create "Progress Update" email content to thank current donors	NFG & Eric
	April 11th @ 9am PST	Send progress update to list of all donors giving/purchasing tickets. Try to make thank-you	Eric

STEP 0

(Before planning) make a commitment.

NEXT >

Critical Success Factors



100% of the board & staff must make a gift

Support the organization according to means and motivation



100% of the board & staff must engage

Thank donors personally to improve retention



Complete everything to which you commit.

Don't commit to anything you can't start or complete on time



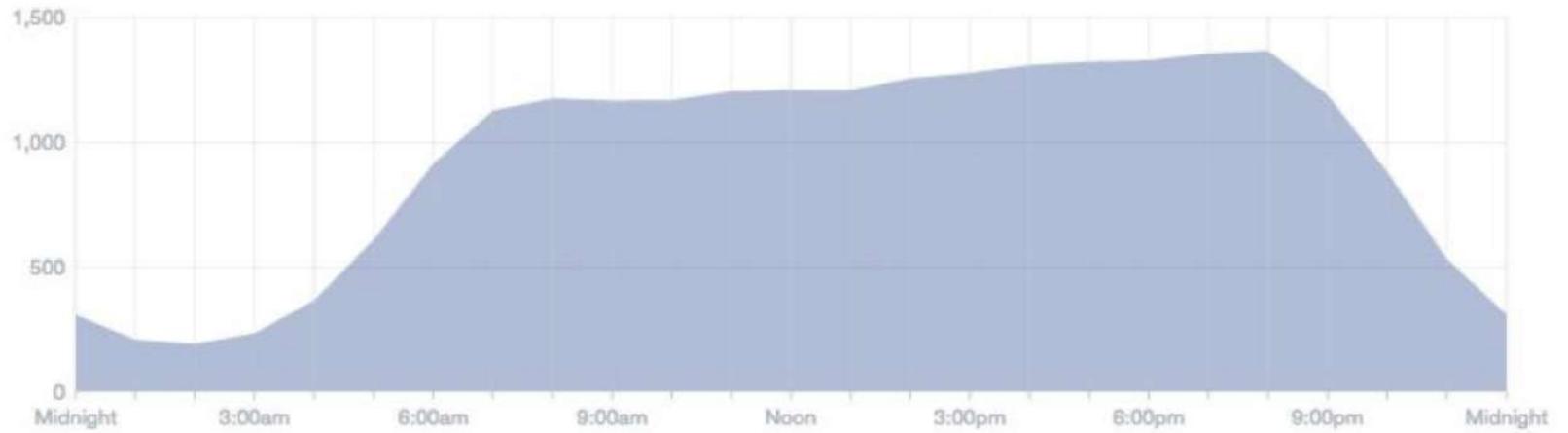
Make a consistent effort (not a big one-time)

Success isn't about earth-shaking effort, it's about consistency

DAYS



TIMES



STEP 0.5

Calculate donor retention rates & focus on gift retention before acquisition.

NEXT >

"TAKING POSITIVE STEPS TO REDUCE GIFT AND DONOR LOSSES IS THE LEAST EXPENSIVE STRATEGY FOR INCREASING FUNDRAISING INCOME."

The Donor Funnel



STEP 1

Select goals – dollars, donors, awareness –
in a written development plan.

(yes, write it down)

NEXT >

Prospects	Mail	Email
Households	100	100
Participation rate	15	17
Average gift	\$50	\$20
TOTAL	\$750	\$340

Donors	Mail	Email
Households	100	100
Participation rate	25	20
Average gift	\$80	\$25
TOTAL	\$2,000	\$500

Board	Form
Members	10
Participation rate	100%
Average gift	\$500
TOTAL	\$5,000

TEMPLATE

FORMULA

Previous Year Total X 70% = Renewable Base

$$\$50,000 \times .70 = \$35,000$$

TEMPLATE

FUNDING SOURCE									
Individual Donors	Strategy	Number to be Solicited	Average Gift	Estimated Income	Associated Expenses	Net Income	Completion Deadline	Staff Responsibilities	Board Dependencies
Renewing annual donors			\$	\$	\$	\$			
Prospective annual donors			\$	\$	\$	\$			
Major Donors	Strategy	Number to be Solicited	Average Gift	Estimated Income	Associated Expenses	Net Income	Completion Deadline	Staff Responsibilities	Board Dependencies
Renewing annual donors			\$	\$	\$	\$			
Prospective annual donors			\$	\$	\$	\$			
Board Giving	Strategy	Number to be Solicited	Average Gift	Estimated Income	Associated Expenses	Net Income	Completion Deadline	Staff Responsibilities	Board Dependencies
Individual cash commitments			\$	\$	\$	\$			
Special Events	Strategy	Number to be Invited	Ticket Price	Estimated Income	Associated Expenses	Net Income	Completion Deadline	Staff Responsibilities	Board Dependencies
Event name			\$	\$	\$	\$			
Event name			\$	\$	\$	\$			
Private Foundations	Program Officer	Date of Meeting with PO	Target Ask Amount	Estimated Income	Associated Expenses	Net Income	Application Deadline	Staff Responsibilities	Board Dependencies
Foundation name			\$	\$	\$	\$			
Foundation name			\$	\$	\$	\$			
Government Grants	Contact/Liaison	Date of Meeting with Liaison	Target Ask Amount	Estimated Income	Associated Expenses	Net Income	Application Deadline	Staff Responsibilities	Board Dependencies
Agency/Department name			\$	\$	\$	\$			
Agency/Department name			\$	\$	\$	\$			
Business Donors/Sponsors	Strategy	Number to be Solicited	Target Ask Amount	Estimated Income	Costs	Net Income	Proposal Deadline	Staff Responsibilities	Board Dependencies
Small & local businesses			\$	\$	\$	\$			
Sponsorships			\$	\$	\$	\$			
Corporation name			\$	\$	\$	\$			
Corporation name			\$	\$	\$	\$			
Earned Revenue	Strategy	Point of Sale Location	Item Price	Estimated Income	Associated Expenses	Net Income	Completion Deadline	Staff Responsibilities	Board Dependencies
Ticket sales			\$	\$	\$	\$			
Merchandise sales			\$	\$	\$	\$			
Concessions			\$	\$	\$	\$			
Volunteer groups			\$	\$	\$	\$			
TOTAL			\$	\$	\$	\$			

STEP 2

Create your calendar for
the fall & year-end.

NEXT >

Your plan is more than strategies and goals, it also is a calendar, sequencing all of the interdependent steps.

1. Create timeline
2. Secure board commitment
3. Create content & channels
4. Create challenge grant
5. Create segments
6. Ready website
7. Move to production
8. Configure automated acknowledgment
9. Deploy campaign
10. Send acknowledgments

One email or post does not a campaign make.

(and no, you won't annoy people)

CHANNEL & POST TIMING	Email	Social	Board/Staff
Day 1, Morning	X	X	X
Day 2, Afternoon		X	
Day 3, Morning	X	X	X
Day 3, Afternoon		X	
Day 3, Evening	X	X	

Remember, there's no bad time to raise money.

Send one email at 2:00 p.m...

when readers are back from brunch or errands and are at home, presumably preparing for the evening;

Send one at 5:30 p.m...

when readers are in-waiting to begin evening plans and might not have much to do, excepting passing time on their phone; and

Send one at 8:30 p.m...

when readers are back home from dinner and either settling in for the evening or again, waiting to join friends, family.



Do you have a plan in place
to communicate the impact
of each gift to your mission
& programs?

STEP 3

Determine segments.

NEXT >

Renewed donors	Made a gift in the current fiscal year	Second gift, upgrade/ special program appeal
Event donors	Attended an event in the current fiscal year, but has not made an annual gift	First gift, flat amount of \$25-\$40 for a special program
Current donors	Made a gift in the last fiscal year, but not yet in the current year	Last gift amount + 50% more; or recurring/ monthly giving program enrollment
Lapsed donors	Made a gift two years ago, or prior, but not since or in the current fiscal year	Last gift amount, special program appeal
Non-donors	Prospects for whom you have a mailing or email address, but have not ever made a gift	First gift, flat amount of \$25-\$40 for a special program

Create a "segment of one" with an appropriate ask.

STEP 4

Select communication channels.

NEXT >





GENERATION Y

Age 18-32

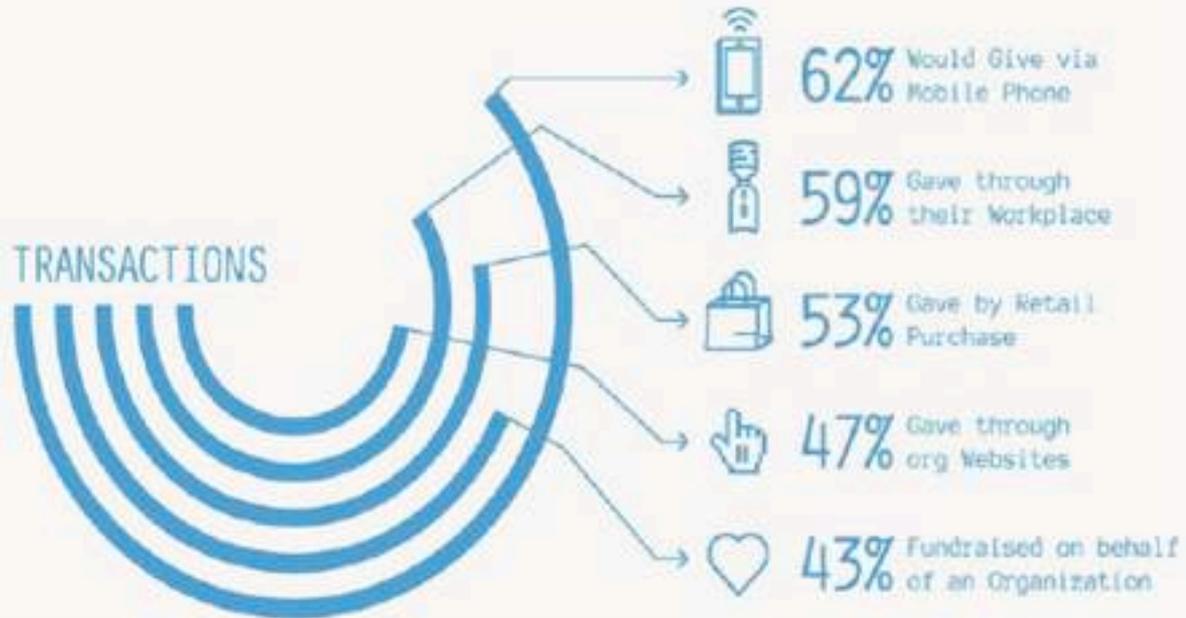


60% in this generation give an average of \$481 per year across 3.3 charities

Gen Y represents 11% of total giving



TRANSACTIONS





GENERATION X

Age 33-48

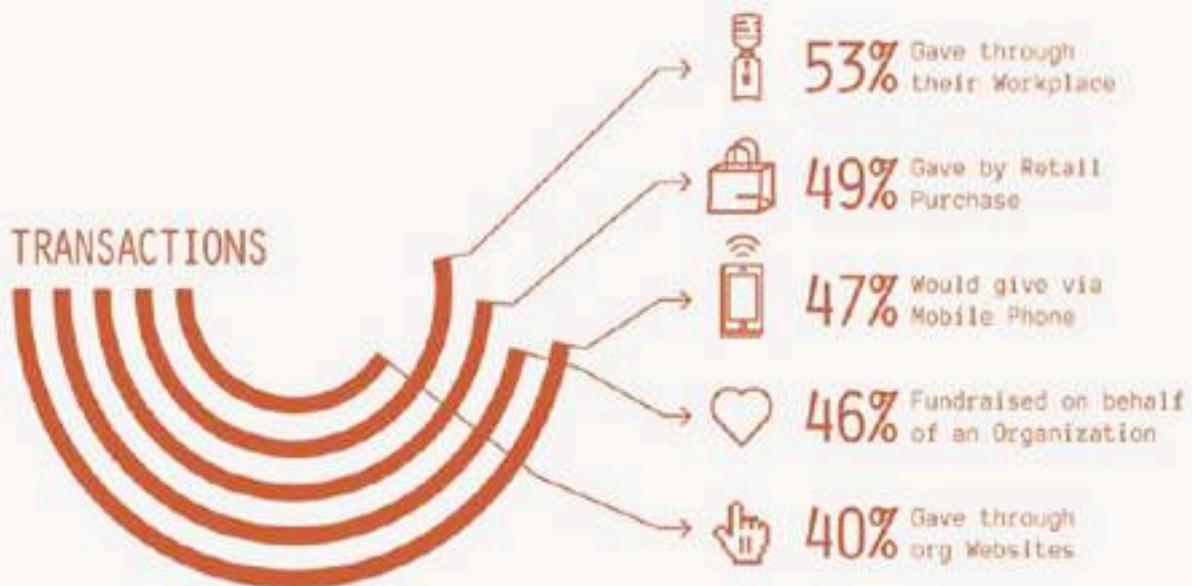


50% in this generation give an average of \$732 per year across 3.9 charities

Gen X represents 20% of total giving



TRANSACTIONS





BABY BOOMERS

Age 49-67

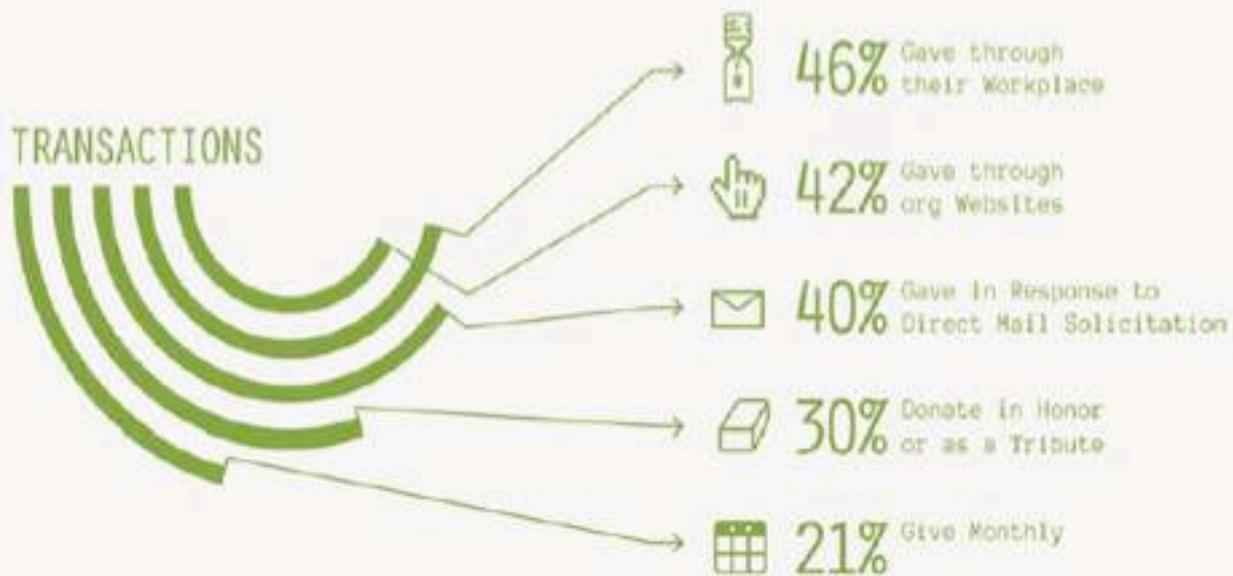


72% in this generation give an average of \$1,212 per year across 4.5 charities

Baby Boomers represent 43% of total giving



TRANSACTIONS





MATURES

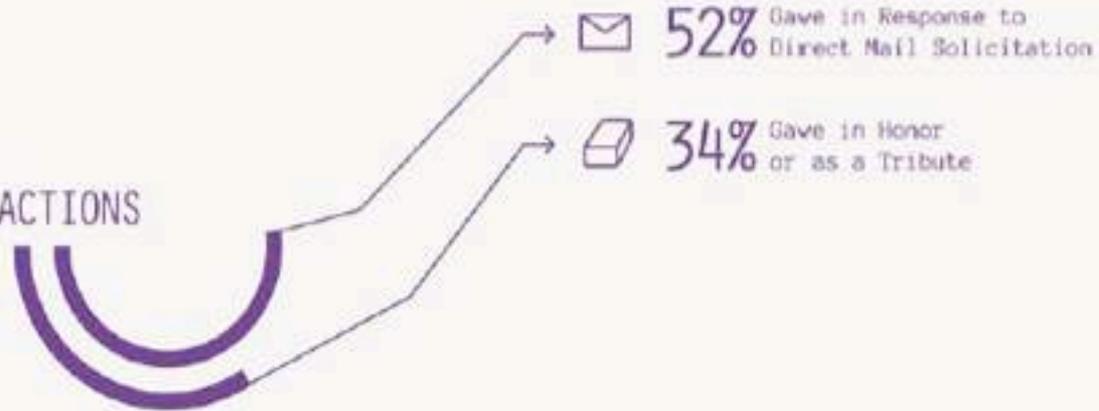
Age 65+

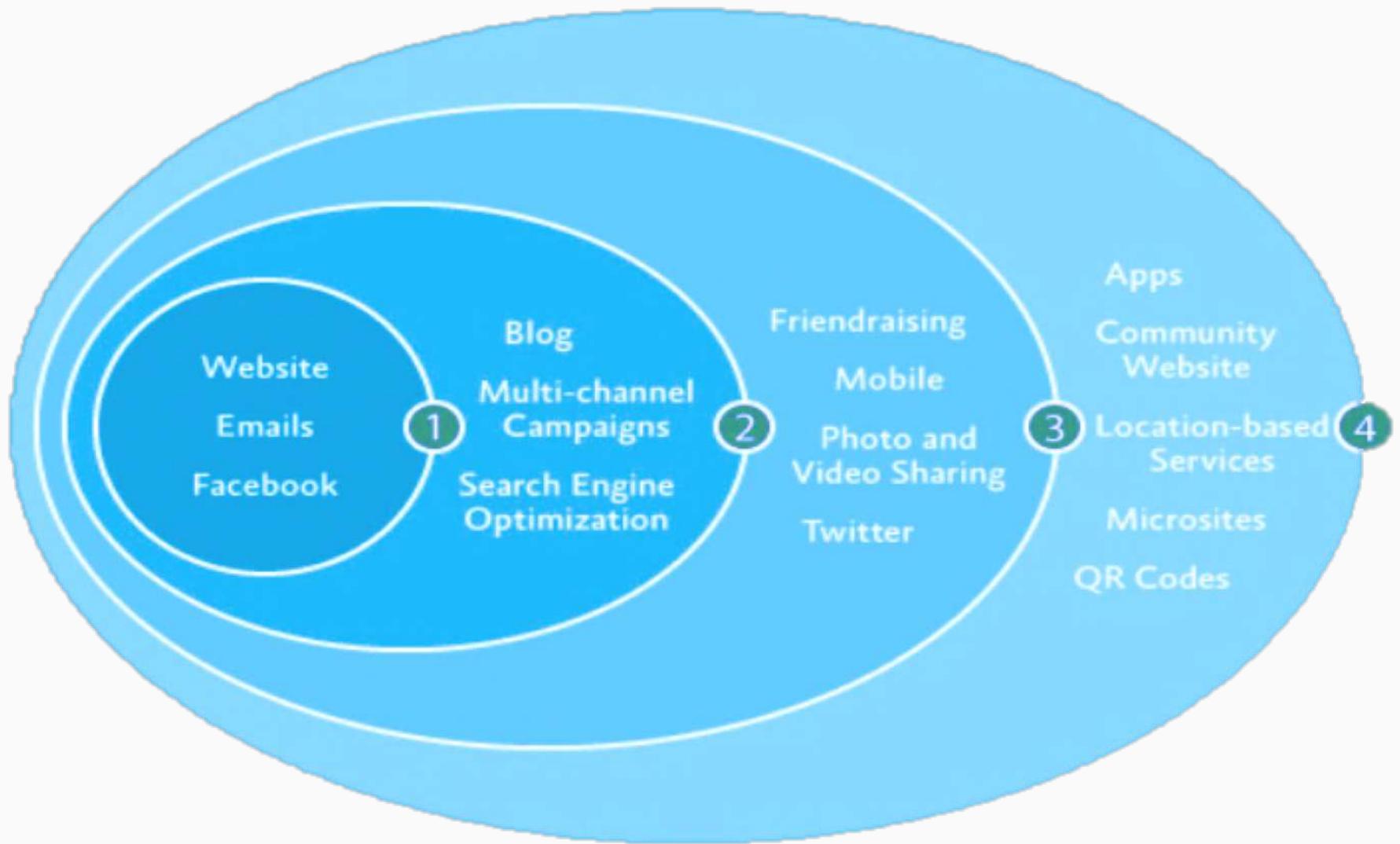
Matures represent 26% of total giving



88% in this generation give an average of \$1,367 per year across 6.2 charities

TRANSACTIONS







You have to do a little bit of everything to reach everyone, but start with channels that can reach the most for the lowest cost.

STEP 5

Leverage technology.

NEXT >

Create Giving/Campaign Pages

My Campaigns

[+ Add Peer to Peer Campaign](#) [+ Add Everyday Giving Campaign](#) [+ Add Event Campaign](#)

● Active ● Pending ● Incomplete ● Closed | ★ Giving Site Homepage ([change](#))

Campaigns **18** Closed Campaigns **2**

PAWS CHICAGO ★
EVERYDAY GIVING



RAISED: \$14,575 GOAL: \$25,000

 20	 290	 2768
Recurring Donors	Donations	Visits

 LAST DONATION: \$50.00 ON 9/21/2017

[View Campaign Page](#) [Campaign Dashboard](#)

A New Surgical Suite ●
PEER TO PEER



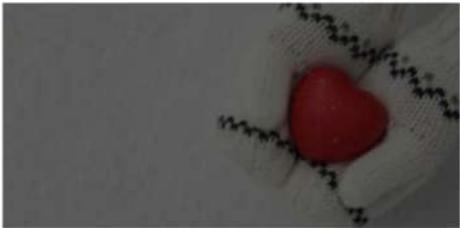
RAISED: \$19,475 GOAL: \$36,500

 19	 33	 0
Fundraisers	Donations	Days Left

 NO PENDING FUNDRAISER PAGES (YET!)

[View Campaign Page](#) [Campaign Dashboard](#)

Giving Tuesday!!! ●
EVERYDAY GIVING



RAISED: \$5,600 GOAL: \$10,000

 1	 27	 114
Recurring Donors	Donations	Visits

 LAST DONATION: \$100.00 ON 9/25/2017

[View Campaign Page](#) [Campaign Dashboard](#)

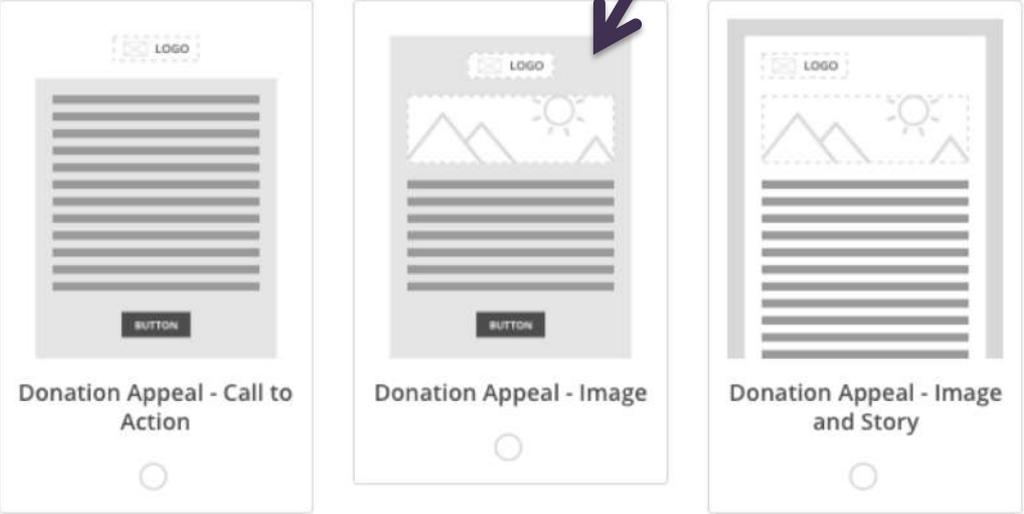
Create & Schedule Emails

Purpose > **Layout** > Build > Setup > Recipients > Review

[← Back](#) **Layout** [Next →](#)

Recommended All Layouts

These recommended templates have been designed specifically for this purpose. If you prefer to start from something more basic click "All Layouts."



The image shows three mobile email templates for donation appeals. Each template features a 'LOGO' placeholder at the top, a central image area, and a 'BUTTON' at the bottom. The first template, 'Donation Appeal - Call to Action', has a solid background with horizontal lines for text. The second, 'Donation Appeal - Image', has a light background with a mountain and sun image. The third, 'Donation Appeal - Image and Story', has a light background with a mountain and sun image and horizontal lines for text. A dark arrow points to the 'Image' template.

Donation Appeal - Call to Action

Donation Appeal - Image

Donation Appeal - Image and Story

STEP 6

Execute!!

(and make sure your board does, too)

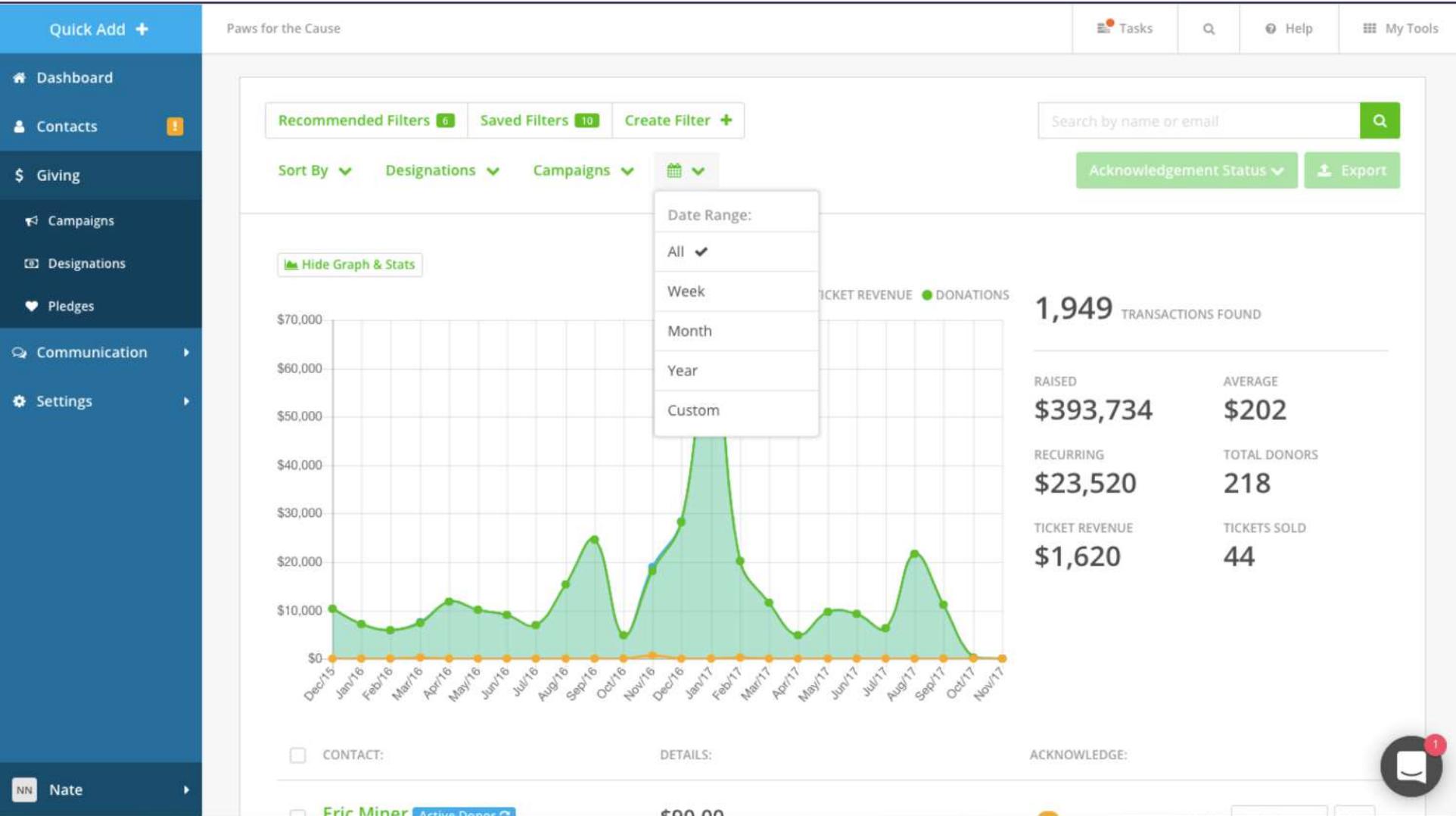
NEXT >

STEP 7

Measure results.

NEXT >

Measure results – can take a variety of forms.



STEP 8

Thank donors.

NEXT >

PART 3

Incorporating easy, low-cost retention & cultivation ideas.

Overlaying national averages, gift attrition of 63%,
gift increases of 12%...

YEAR	DONORS	AVG GIFT	REVENUE
2017	100	\$200	\$20,000
2018	41	\$224	\$8,960
2019	16	\$251	\$4,016
2020	6	\$282	\$1,692
2021	2	\$315	\$630

NEXT >



Follow donors, prospects on social media

Allows you to comment on news and stories for which you have subject matter expertise

Builds your network for #GivingTuesday and easy outreach thereafter (for future efforts)

The simple act of following suggests you're thinking about the donor or prospect and you value what they say to their networks



Conduct a virtual briefing or town hall

Respond to an emerging need or news story that relates to your mission, invite donors and prospects to call- or dial-in

Have someone who benefits from your mission and programs speak about their experience

Outline your plan to address the opportunity or need – how you're going to take action



Create a simple, clickable newsletter

Find a story or online content that addresses between 2-4 programs in your mission

Embed links in an email with an appealing image that drives a click or shows the program in action

Review which donor, prospect clicked on which link/story to make a first-pass assessment of what's most important to them



Invite them to see or tour a program in action

The simple act of inviting is a powerful gesture, even if they do not attend

Those that attend are truly interested in your programs, services – and not wine and passed hors d'oeuvres

Demonstrates to invitees that their dollars support programs and impact, not entertainment.



Send an update email

Tell donors and prospects what you achieved this summer and what's ahead this Fall

Preview themes and/or messages you want to integrate into the appeals you'll eventually make

Keep it under 100 words, use an image that shows their dollars/your programs at work.



Conduct a donor thankathon

Who doesn't like to be thanked for making a gift, given the primary reason for giving is how it makes a donor feel?

Easy way to engage the board in fundraising – an activity for which they don't feel pressure to ask for money

You only need to prepare a simple script, leaving voicemails, and can do this at a board meeting you extend by 30 minutes

Questions & Next Steps