Fear: false energy appearing real
The *wrong* (and most common) approach

1. “Everyone’s gotta be involved in fundraising!”
2. “We’re not going to make a formal plan – it’s going to happen, have faith!”
3. “We’re barely surviving…we’re a nonprofit!”
4. “We need money!”
5. “Get out there and raise money!”

Role Play

Scared yet?
The right way – no fear

1. Specify involvement and tasks
2. Make a plan
3. Organizations don’t have needs – they serve needs
4. We are a business
5. From fundraising to development

Specify involvement and tasks

- Development Committee
- What roles/tasks are people comfortable with:
  - Administrative
  - Database and contact management
  - Donor Research
  - Event planning
  - PR, Communications
  - Networking, relationship building, giving contacts
  - The ask - closers
Make a plan

1. Determine main 3-5 donor categories (use at least the three below)
   - Individual/household
   - Grantor (separate public and private?)
   - Business
2. Determine what strategic donor groups you want to track.
3. Identify the strategy to pursue all Donations:
   - Campaigns
   - Appeals
   - Events
   - In-Kind (must be tracked, valued and recognized)

Opportunity to help meet needs
The Case Statement

Case Statement

- Evidence of need
- Ability to meet the need
- Track Record
- Org Capacity
- Goals
- History and Mission
- Need
- The ask

The business plan

- Nonprofit is not a business plan!
- Investment model
- Accountability
- Success not distress
Fundraising to Development

- Fundraising
  - Short-term
  - Ad Hoc
  - Event Based
  - Working Harder
  - DISTRESS

- Development
  - Long-term
  - Systematic
  - Relationship Based
  - Working Smarter
  - SUCCESS

Now what about those donors and funders?

Be donor-based…
Development Truths (for more major gifts)

- People give to People.
- You have to ASK for a gift or donation.
- Success comes from meeting the needs of your donors.
- Organizations don’t have needs – they serve needs.
- Relations are more important than transactions.
- Donors give out of self-interest.
- Donors like to see a direct connection with regards to their gift.
- Donors exist across the social and political spectrum.

Approaching Donors

- This is a process not an “event” – build a relationship
- Determine what the donor needs – what is important to them?
- Present clear and concise information tailored to the donor. Case Statement
- Set clear goals for each interaction.
## Types of Donors – know your donors

<table>
<thead>
<tr>
<th>Type of Donor</th>
<th>Characteristics</th>
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<tbody>
<tr>
<td><strong>“Bleeding Heart”</strong></td>
<td>• Just want to help</td>
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<td></td>
<td>• Focus on human impacts, stories, old capabilities vs. new capabilities with gift</td>
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<td></td>
<td>• Tend to think “blue sky” and very positively - inspire them</td>
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<tr>
<td><strong>“All Business”</strong></td>
<td>• Focus on budget, financial responsibility, business plan, feasibility of fundraising plan and project</td>
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<td>• Project diversifies funding - less government support - more self-sufficient</td>
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<td></td>
<td>• “Conservative” at least fiscally</td>
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<tr>
<td><strong>“Services and Operations”</strong></td>
<td>• Want more “hands-on” knowledge of operations - details</td>
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<td></td>
<td>• May have experience with a service organization(s) - may be former athlete or coach (or think of themselves in that way) - want detailed program info</td>
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<td>• At the organization efficient and effective - How do you think your expectations as a quality program?</td>
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<td><strong>“Socialite or Politician”</strong></td>
<td>• Not always large donors, or a donor at all, but can access and influence</td>
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<td>• Want to “connect” to the broader social and political statement</td>
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<td></td>
<td>• Need constant affirmation</td>
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<tr>
<td><strong>“Real Wealthy”</strong></td>
<td>• Hard read - may present as any of the above?</td>
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<td>• Everyone is after their money - they hold cards close to chest</td>
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<td>• Need high degree of trust</td>
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<td>• Wants special access, operate not concerned with recognition, and may not want it</td>
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<tr>
<td><strong>“Other”</strong></td>
<td>• Every donor is unique and has unique needs and perspectives - find out what they are</td>
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<td></td>
<td>• Make a strategy for each donor, and get beyond the stereotypes</td>
</tr>
<tr>
<td></td>
<td>• Know your donors - and get to know potential donors</td>
</tr>
</tbody>
</table>

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**Now let’s try that again…**