

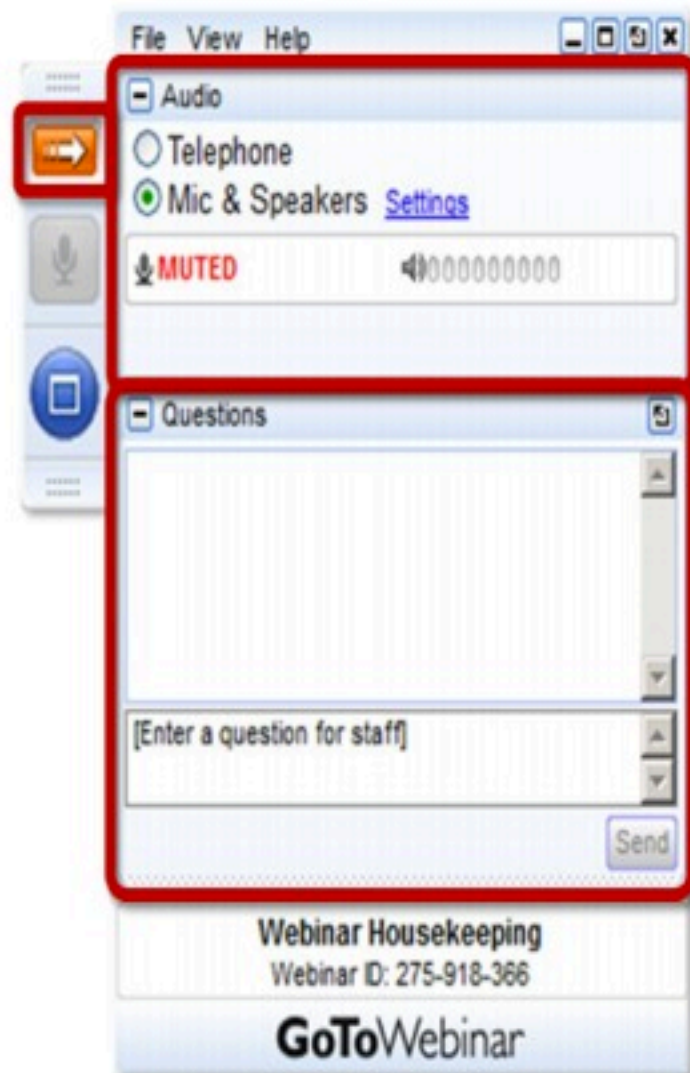


How To  
Explode  
*your*  
*fundraising*  
in

**2017**

*With Pamela Grou*

# GoToWebinar



## Your Participation

Open and hide your control panel

Join audio:

- Choose "Mic & Speakers" to use VoIP
- Choose "Telephone" and dial using the information provided

Submit questions and comments via the Questions panel

GoToWebinar support phone number is 1-800-263-6317

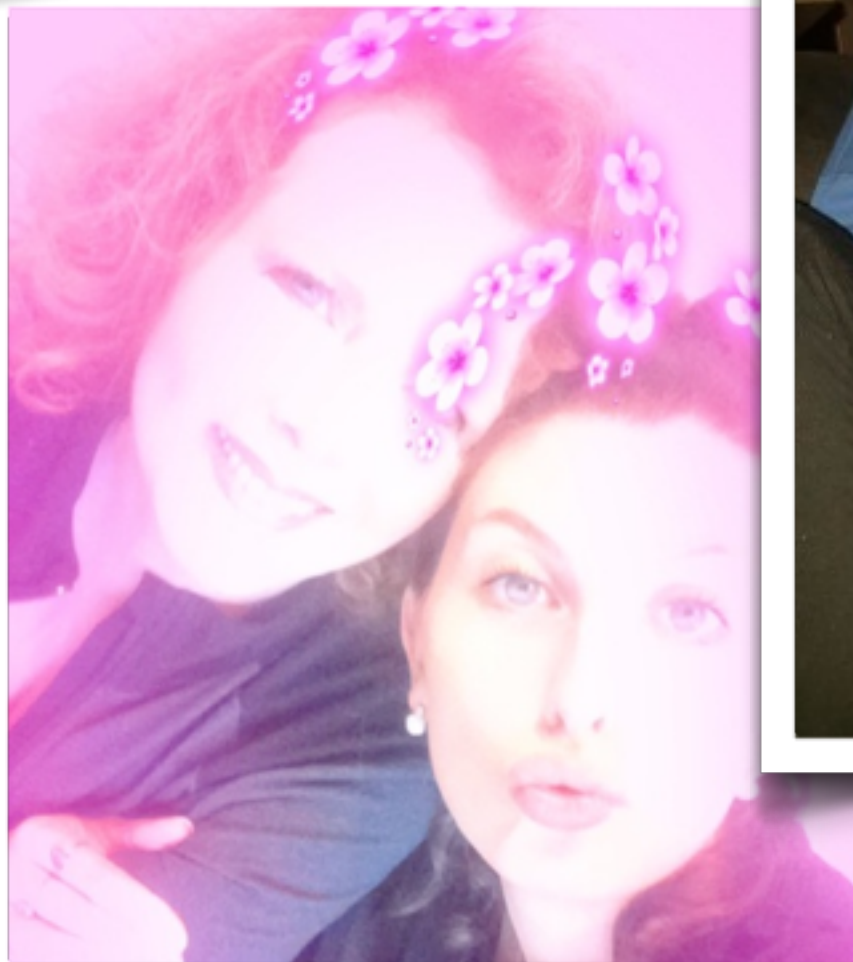
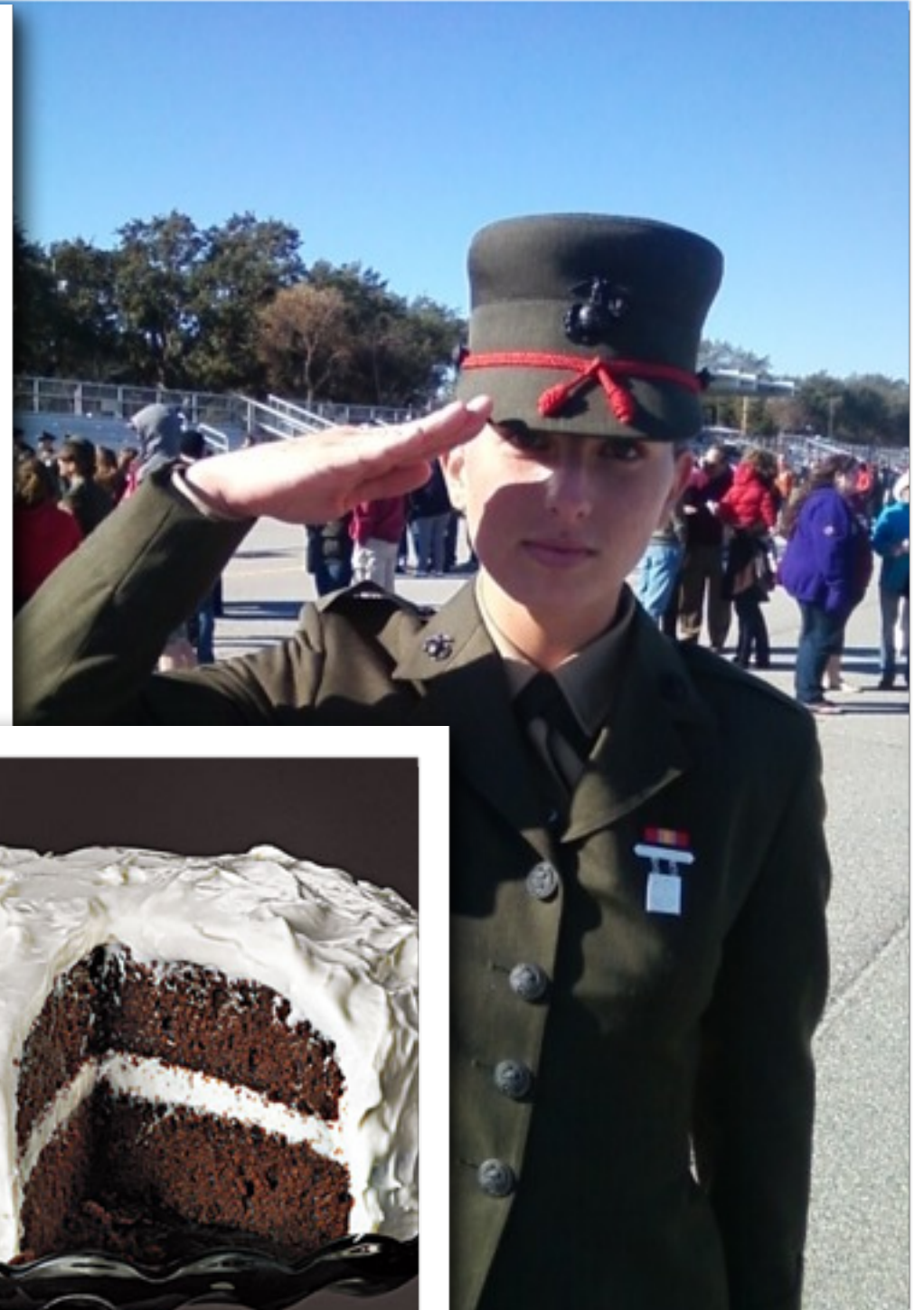


# ABOUT ME





# WHAT GETS ME GOING





# Does this sound like you?

- You were busier than ever last year, but you're not sure what you really accomplished.
- You didn't achieve your biggest goals. You're disappointed and you know there must be a better way.
- You had a fantastic year...but you're not sure you can do it again - you're *exhausted*!



**Thank You For  
Being Here  
Today!**



# YOU'RE BUSY!

I am working on my BUDGET! The dreaded budget!

Lie

Hi Pamela,

I would love to try and win this book!

I work at Community Nurse Health Center, a Federally Qualified Health Center, providing primary care, behavioral health care to about 4400 low income individuals and families in the Chicagoland area. I do all of the communications, marketing and fundraising.

This is my to-do list for this week:

- This Sunday, our organization turns 95 years old, so I am
    - o Updating our branding standards to include our 95th anniversary logo
    - o Ordering 95th anniversary banners for our three buildings
    - o Ordering printed grocery bags that we can give out to our volunteers, patients, resale shop customers and staff
    - o Designing a 95th lapel pin and getting pricing on them
  - Finalizing a patient newsletter with our printer as soon as I get the address list from Medical
  - Finalizing our monthly organization's e-newsletter (I more article needed!)
  - Finalizing newspaper ads for our resale shop
  - Speaking with our printer about an event postcard mailing, and our impact report which I hope to have sent out in April
  - Finalizing fundraising reports for 2015
  - I had two chamber meetings last week and am still trying to respond to people who requested sponsorship information at those meetings.
- One thing that you might be interested in (that's not on this week's list) is that I'm working on finding a local florist who can do those sales. My goal is to have this up and running just before National Nurses Week celebration.

Right this very minute, I'm finishing my coffee, ready to tell people that my boyfriend of 5.5 years

Hi Pamela,

I am working on 3 things that we are doing this all at the

1. Boring accounting
2. A grant application
3. Creating a week

Cheers,

Phil

Hi Pam!

I'm working on our capital campaign for a new facility. We've just begun the "silent phase" and

During our last meeting, they had mentioned the possibility of hiring someone to assess and

Thank you!!!!

and colleagues which just produces a sequence of tasks though it feels like  
our shelter and supportive living programs.

# HERE'S WHAT YOU'LL LEARN TODAY

- Where philanthropic dollars really come from
- The most important fundraising lesson
- The difference between being 'busy' and being effective
- Why you must be the change
- The habits of successful fundraisers



# STICK AROUND!





**HOW DID YOU BECOME A FUNDRAISER?**






WHAT WOULD  
YOU HAVE  
DONE?

# Here's what I did...

- Thank for past support
- Introduction
- Request for basic feedback

 Sample Loyal Donor Survey Letter

Dear [Name],

*Always lead with gratitude.*

I can never thank you enough for your support of XYZ organization...  
...but I can try<sup>1</sup>.

As I was going through our records recently, I couldn't help but notice that you've been one of our most valued supporters over the years.

That's why, as the new director of development for XYZ, I wanted to reach out to you personally with my deepest thanks.

Because of you, there is hope.... [Follow with a paragraph about what their support is making possible].

*You'll want this short impact paragraph to be as personal as possible. If the donor has supported a particular program, highlight it.*

As you know, the support of friends like you is critical to our work. And, as a new member of XYZ, I'm committed to donor service, and gaining a true understanding our supporters. [Name], I'm eager to know a bit about why you care so much. If you can, please take a moment to respond to this letter by completing the enclosed short survey<sup>2</sup> and returning it in the self-addressed stamped envelope you'll find inside.

I'm honored to be working alongside XYZ and so grateful to know that we have the support of wonderful donors like you. Thank you for your time.

Warmly,

\_\_\_\_\_  
<sup>1</sup> Mercy Corps.  
<sup>2</sup> Limit your survey to three questions and include enough space for writing.

Pamela Grow Copyright 2016



# RESULTS?

- 20 letters
- 18 responses
- Several sent in money
- Three became major donors
- Donor responses formed the basis for my first - and wildly -successful direct mail appeal

# IT'S ALL IN YOUR PERSPECTIVE



The only thing you sometimes have control over is perspective. You don't have control over your situation. But you have a choice about how you view it.

*Chris Pine*

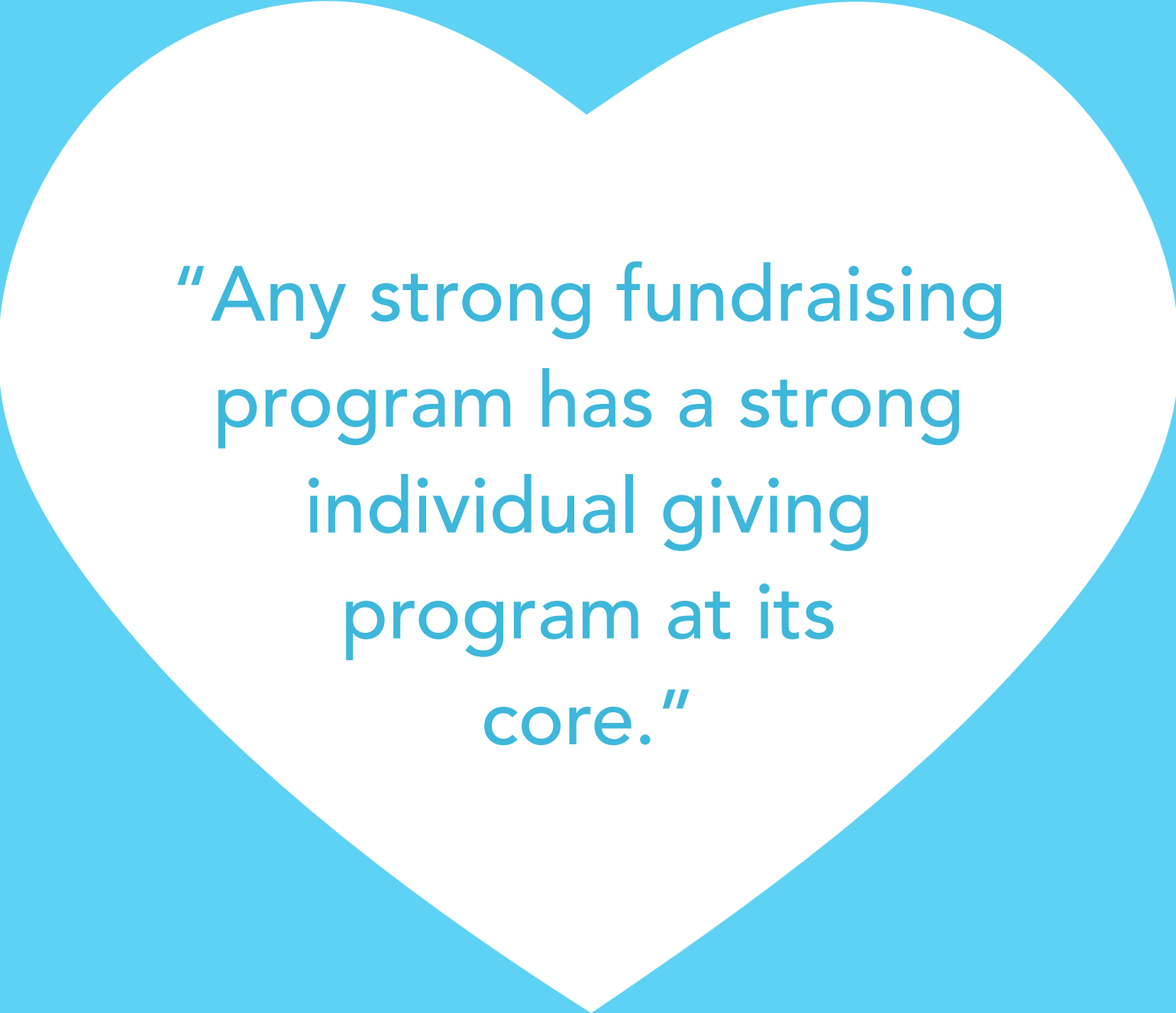
# IS THIS YOUR BOARD?



Text

**SHOW  
ME THE  
MONEY!**





"Any strong fundraising  
program has a strong  
individual giving  
program at its  
core."

# WHERE DO CHARITABLE DOLLARS COME FROM?

*really*

9%  
Bequests

71%  
Individuals

16%  
Foundations

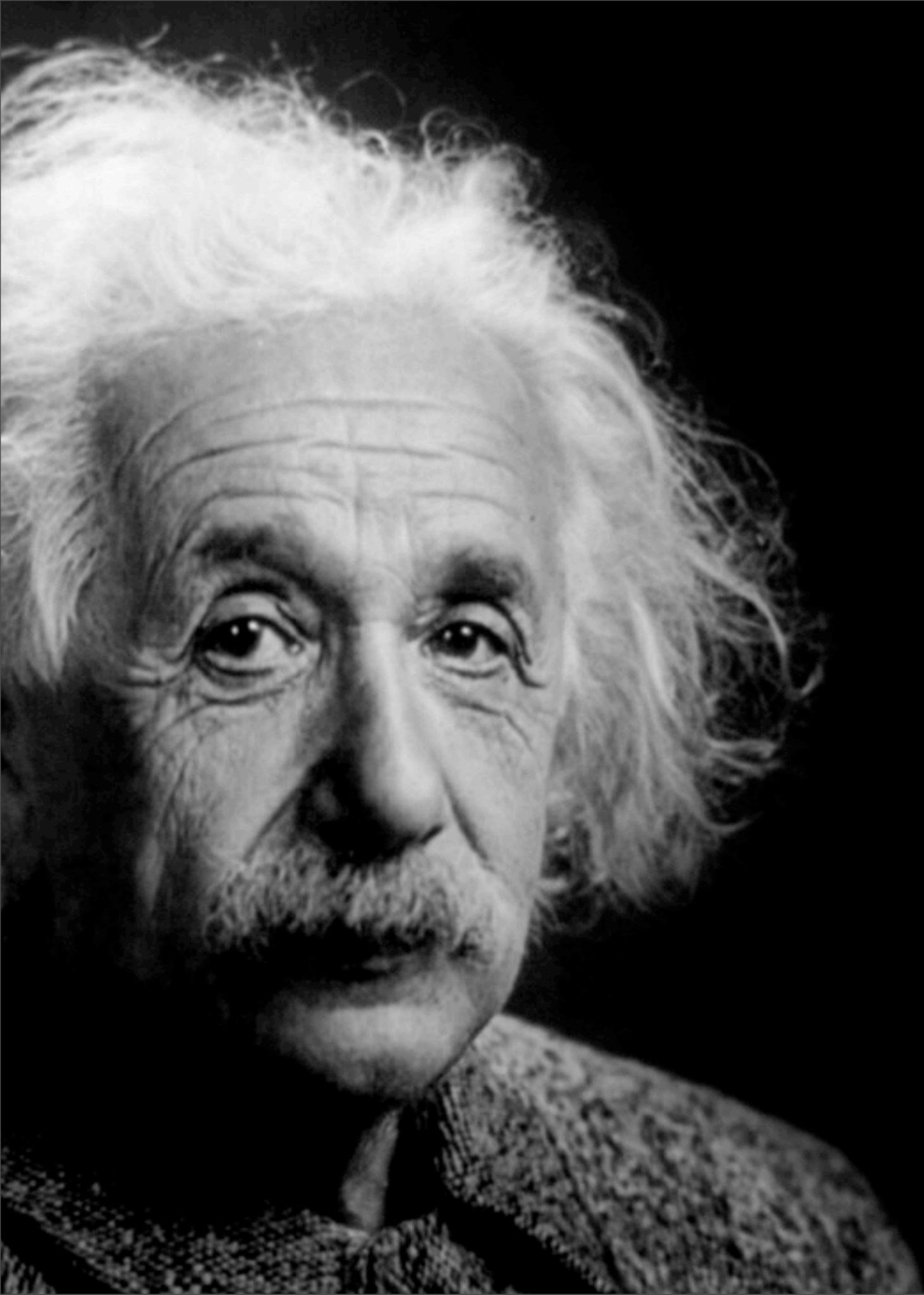
2016

5%  
Corporations

# MOP & GLO

Floor Shine Cleaner





Insanity: doing the same  
thing over and over again  
and expecting different results.

*Albert Einstein*

# THE 'SECRET SAUCE' TO YOUR FUNDRAISING SUCCESS



Aside from your fundraising plan, you need to have a plan in place to **love your donors!**



# YOUR DONOR LOVE FORMULA 101



# YOUR SUCCESS FORMULA

Thank



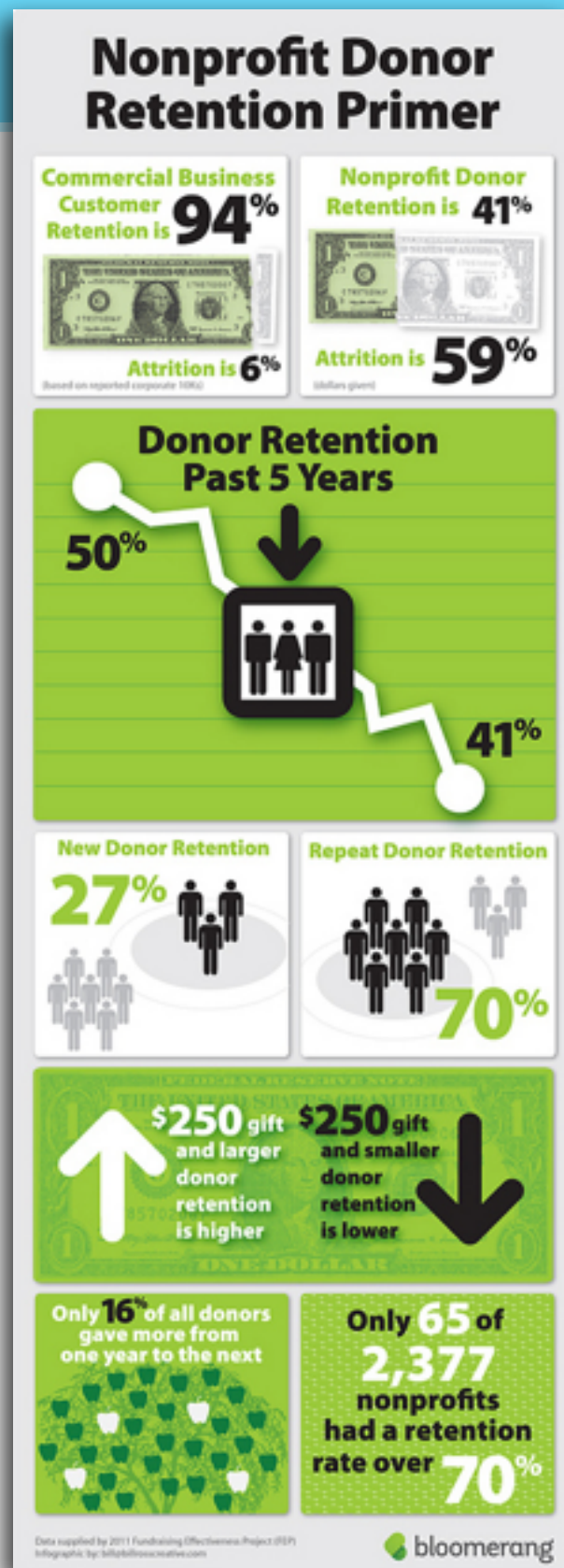
Ask



Report

**Repeat!**

# 1. KNOW YOUR RETENTION RATE AT ALL TIMES.



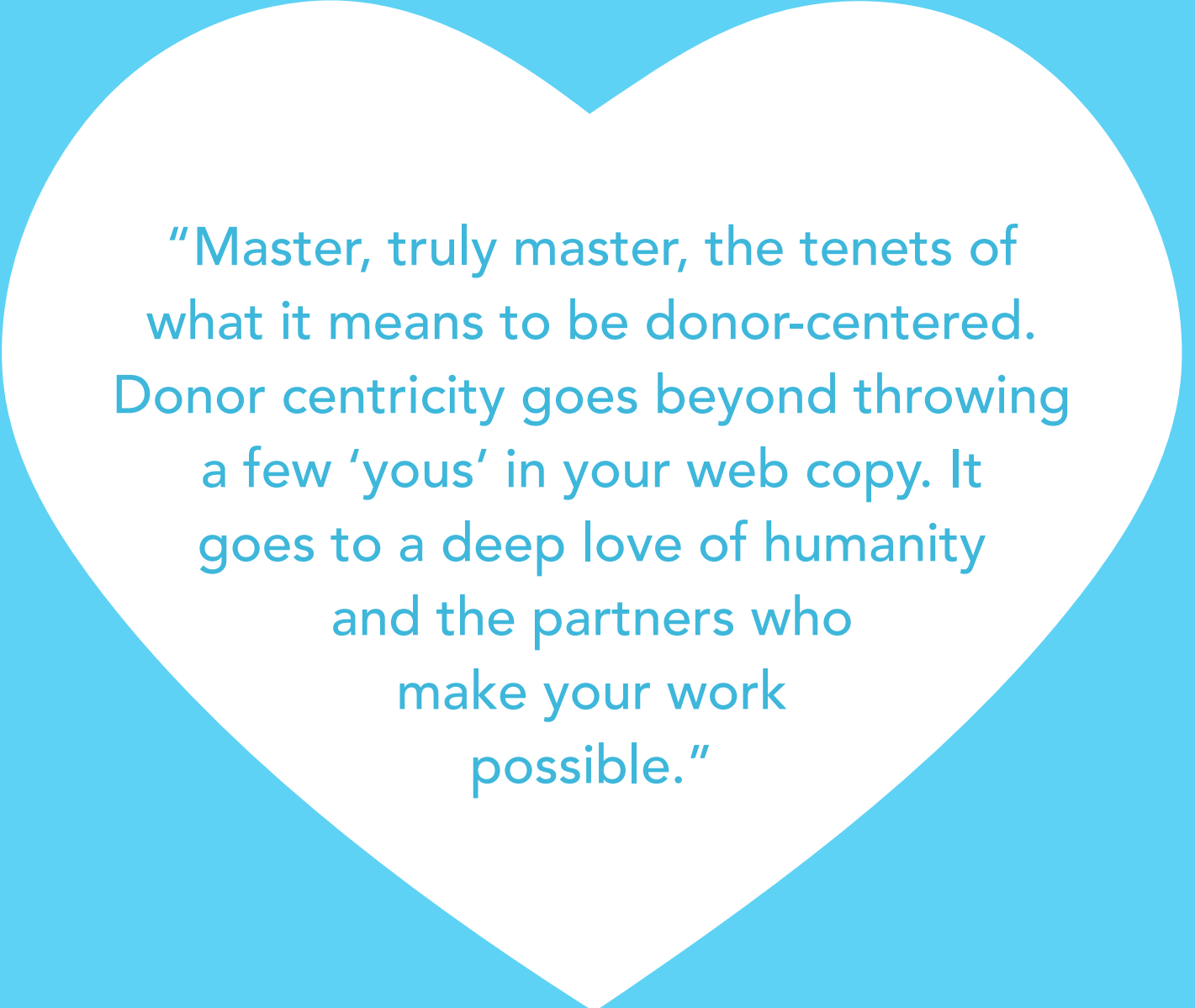
Take the total number of donors who gave in Year 1 and divide it by the total number of those donors who gave in Year 2. Multiply that number by 100 to get your retention rate as a percentage. (You can do a rolling year, e.g. June to June, but it's got to be the same for both calculations.)

Commercial  
**businesses** retain  
**94%** of their  
customers while the  
**nonprofit sector**  
retains only **41%** of  
its donors.



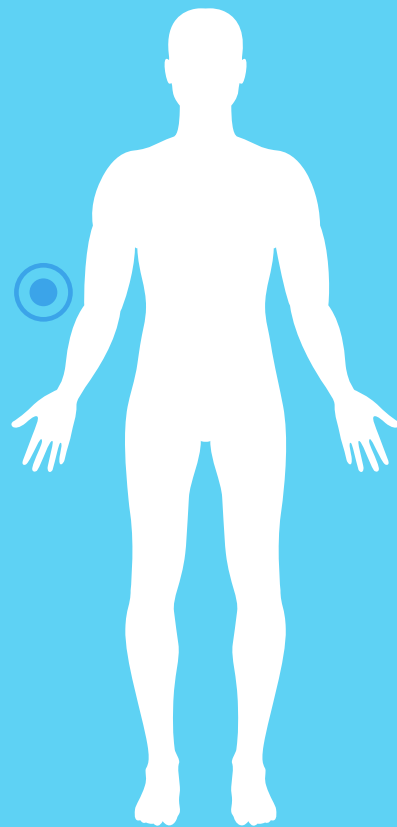


## 2. MASTER THE TENETS OF DONOR-CENTRICITY.



"Master, truly master, the tenets of what it means to be donor-centered. Donor centrality goes beyond throwing a few 'yous' in your web copy. It goes to a deep love of humanity and the partners who make your work possible."

# YOUR DONORS ARE HEROES



“Fundraising is about waking up an army of heroes to join you in your mission.

It’s about inviting people in by letting them sense their own power.”

*Mary Cahalane*

**Veritus**  
GROUP™

f in t

[Blog](#)A gold-colored circular seal with a serrated edge. The outer ring contains the text "Fundraising Success Magazine". The inner circle contains the text "Fundraising Professionals of the Year Awards". A red ribbon banner across the center reads "Best Fundraising Blog" in white text. Below the banner, the year "2014" is inscribed in gold.

★ indicates required

\_\_\_\_\_ ★

\_\_\_\_\_

\_\_\_\_\_




## A 3D illustration of wooden blocks spelling out 'STRATEGY' and 'THINK'. The word 'STRATEGY' is spelled horizontally with blue blocks, and 'THINK' is spelled vertically with white blocks, intersecting at the letter 'T'.

After the initial shock wears off and denial turns to acceptance, the enormity of the task. It is HARD work. We realize that. I mean, if it were easy, everyone would be doing it. But they are not. And this is one of the reasons that MGOs, and ultimately

[illegible]

Wednesday, January 25, 17



"You'll achieve your full fundraising potential once you recognize that your donors absolutely share your goal of wanting to create a positive difference in the world — and understand that your job is not to educate, **but to delight and inspire.**"



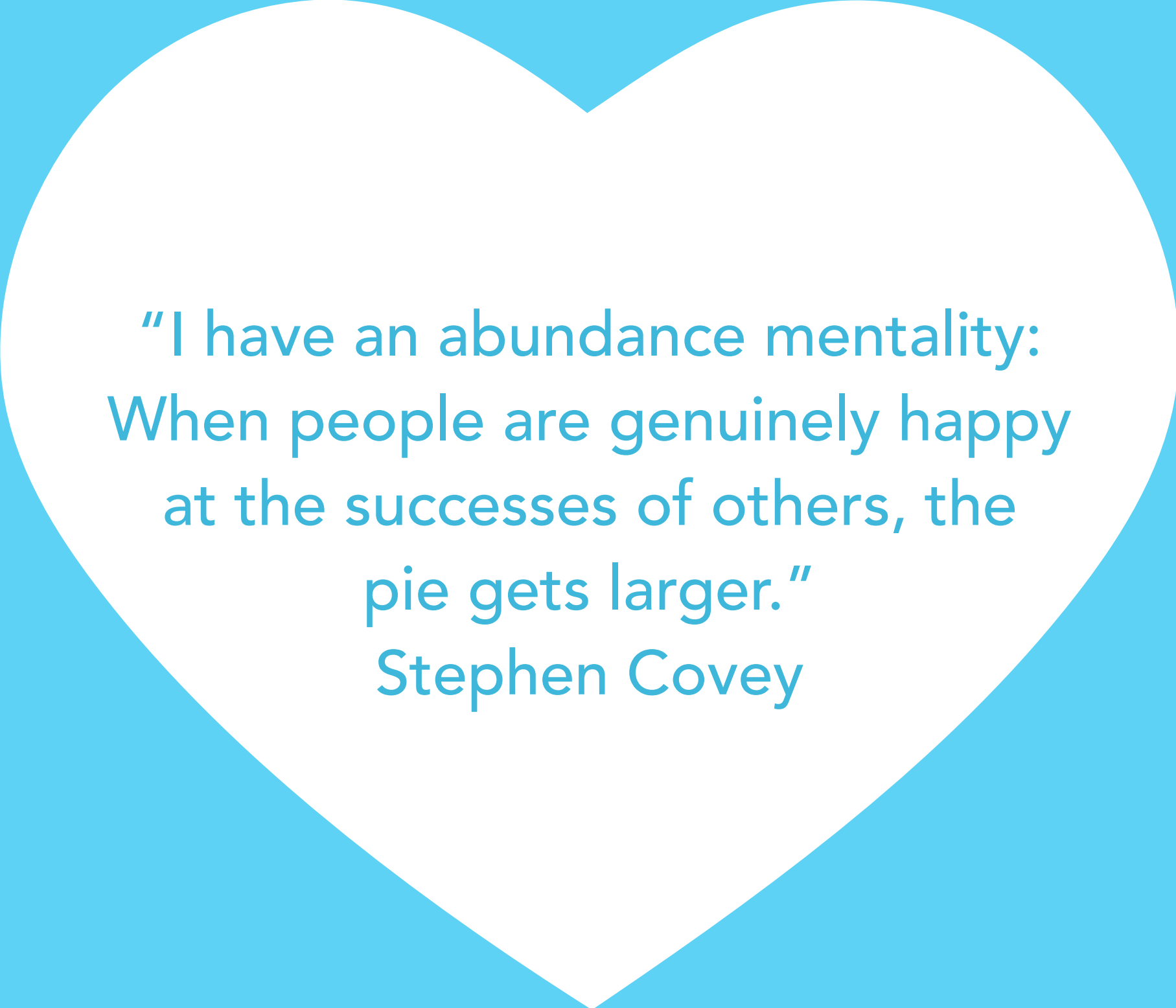
# 4. MAKE GRATITUDE A DAILY HABIT







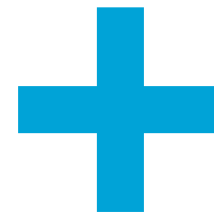
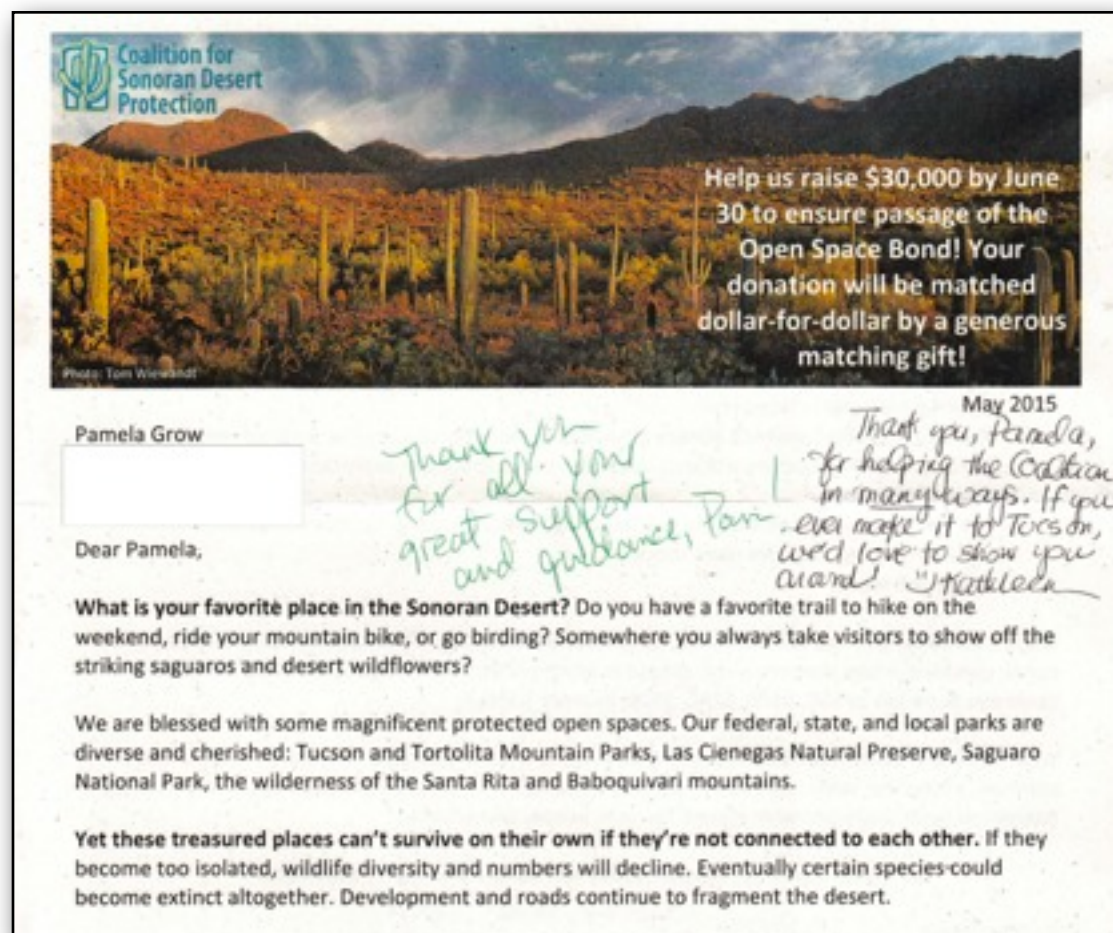




"I have an abundance mentality:  
When people are genuinely happy  
at the successes of others, the  
pie gets larger."  
Stephen Covey

# 5. INTEGRATE PRINT AND EMAIL

92% are driven to online or digital activity;  
87% are influenced to make online purchases;  
54% engage further via social media; and,  
43% download something.





# 5. WORK YOUR MONTHLY GIVING

“...online monthly giving grew by 32% in 2014, compared to just 9% for one-time giving.”

2015 M+R Benchmarks study



"Based on the excellent advice presented in your Monthly Giving course, we've increased our monthly donors by 242% in just 7 months! We're excited to keep building on this success in the coming school year."

Rachel N. Rodriguez, MPA, MSW  
Development Director, Mountain Mahogany Community School





75% of charitable bequests now come from monthly donors. A bequest is 7 times more likely from a monthly donor.

Erica Waasdorp, The Sleeping Giant



# Join Audubon's Cardinal Club

Help provide urgent support for birds and their habitats by becoming a member of Audubon's *Cardinal Club*.

Your reliable monthly support will ensure we have the resources to protect Important Bird Areas, advocate on behalf of birds and other wildlife, and continue to be the nation's premier force for bird conservation.

My gift supports:

*Please select a monthly pledge amount:*

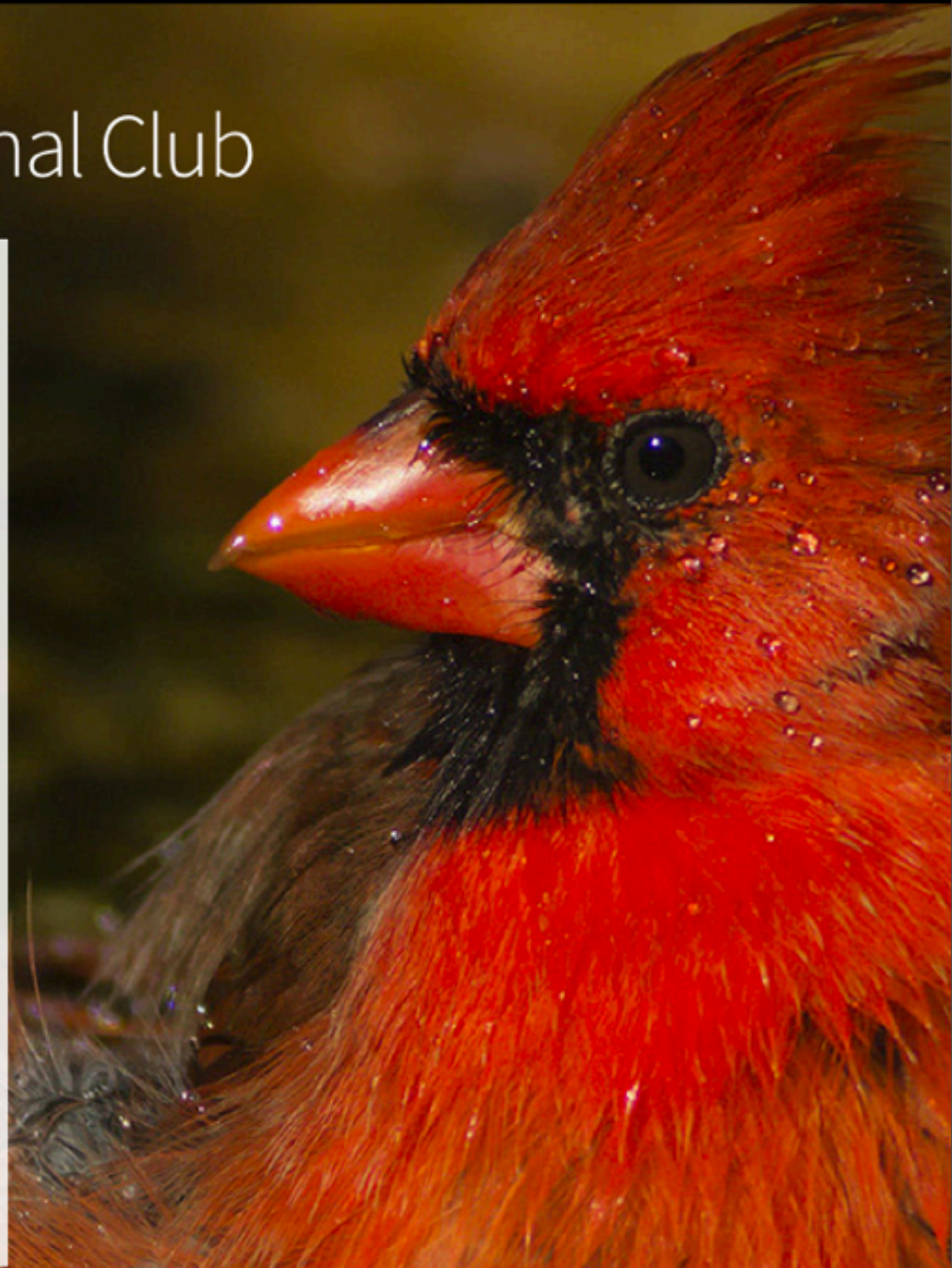
\$10

\$15

\$25

\$50

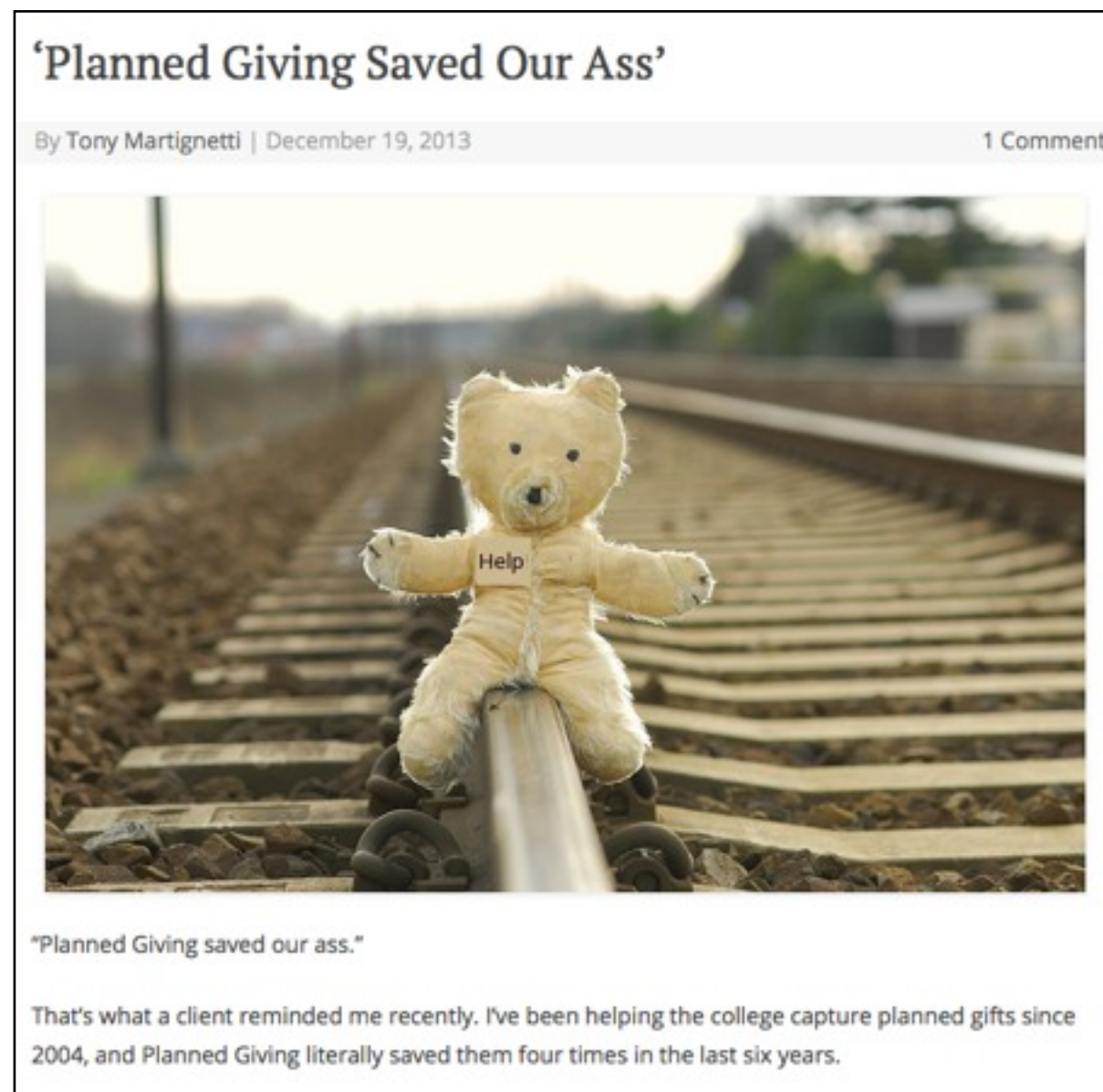
Other Amount





## 7. FIGURE OUT HOW TO COMMUNICATE THAT YOUR BEQUEST PROGRAM EXISTS

# “Planned Giving Saved Our Ass!”





# REMEMBER...

‘....dead people, through their estates, give away more money year after year than all US corporations combined.’

*Andy Robinson*


# Planned Giving

## Your Legacy for Birds



Photo by Gerrit Vyn

 Print

 E-mail

AAA Decrease

AAA Increase

### Planned Giving

▸ [How to Give](#)

▸ [What to Give](#)

[Compare Gift Types](#)

[Sapsucker Woods Society](#)

[Success Stories](#)

[Life-Stage Gift Planner™](#)

[FAQs](#)

[Newsletter Sign-Up](#)

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 eBrochures

## Success Stories



**Bird Cams Inspire  
Gift in Will**



**Sandy and Jeff Bricker:  
Passionate Birders  
Put Lab in Their Plan**



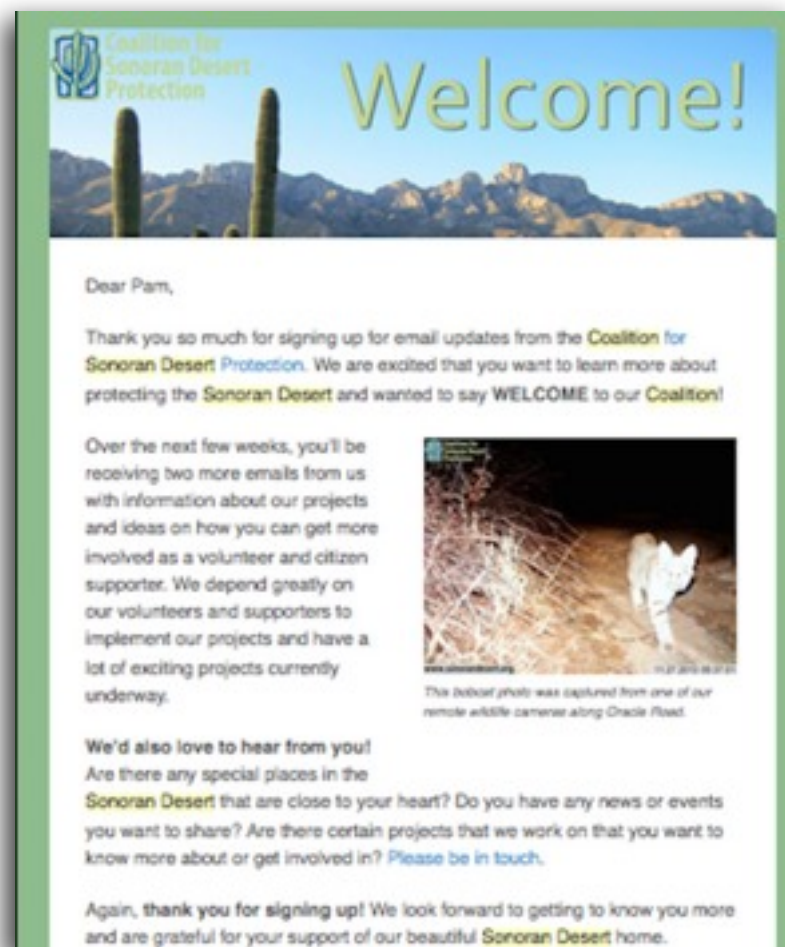
## 8. ZERO IN ON ACQUISITION

“What if I told you Starbucks spends \$1,400 to acquire a customer who starts off by spending \$4.25 for a Caramel Frappacino®. You’d say Starbucks is foolish — until you learned that the **20 year Life Time Value of a Starbucks customer is \$14,099**. That’s why, for the same reason, Amazon spends \$240 to acquire a customer for its \$69 Kindle ... why insurance companies pay more than 100% of the first year’s premium to acquire a policy holder ... and on and on. If consumer companies didn’t invest this way — plus make the additional investment required to hold on to these new customers and convert them to long-term, committed customers — they’d be out of business.”

Roger Craver



# INEXPENSIVE ACQUISITION



Welcome Message (or series)



Event followup (turning ticket buyers into donors)

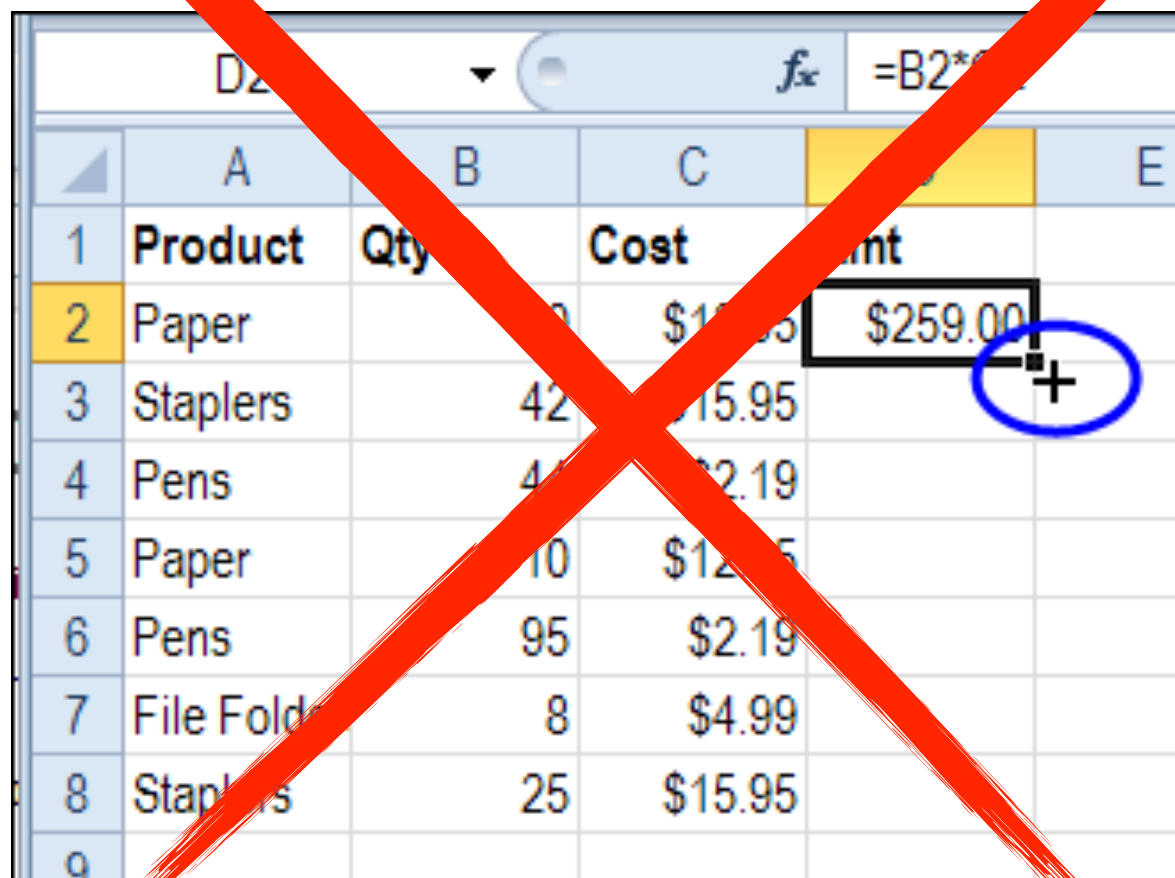


Create a system for welcoming new donors.



Nonprofit Crowdfunding

# CREATE YOUR SYSTEMS AND INVEST IN TRAINING



	A	B	C	D
1	Product	Qty	Cost	Amt
2	Paper	10	\$15.95	\$259.00
3	Staplers	42	\$15.95	
4	Pens	41	\$2.19	
5	Paper	10	\$12.95	
6	Pens	95	\$2.19	
7	File Folders	8	\$4.99	
8	Staplers	25	\$15.95	
9				

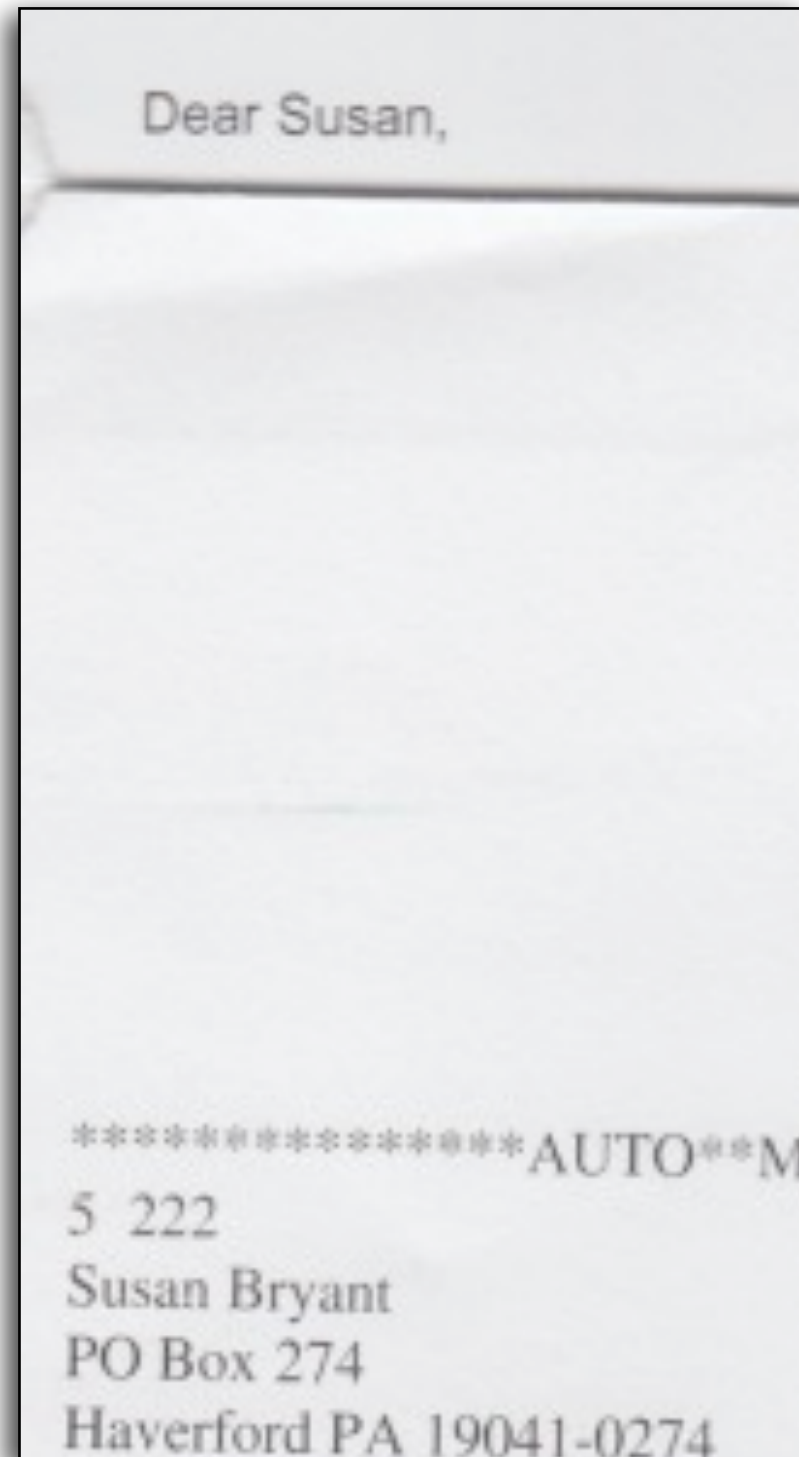
*Excel is not a  
database*

# YES, IT'S TRUE!

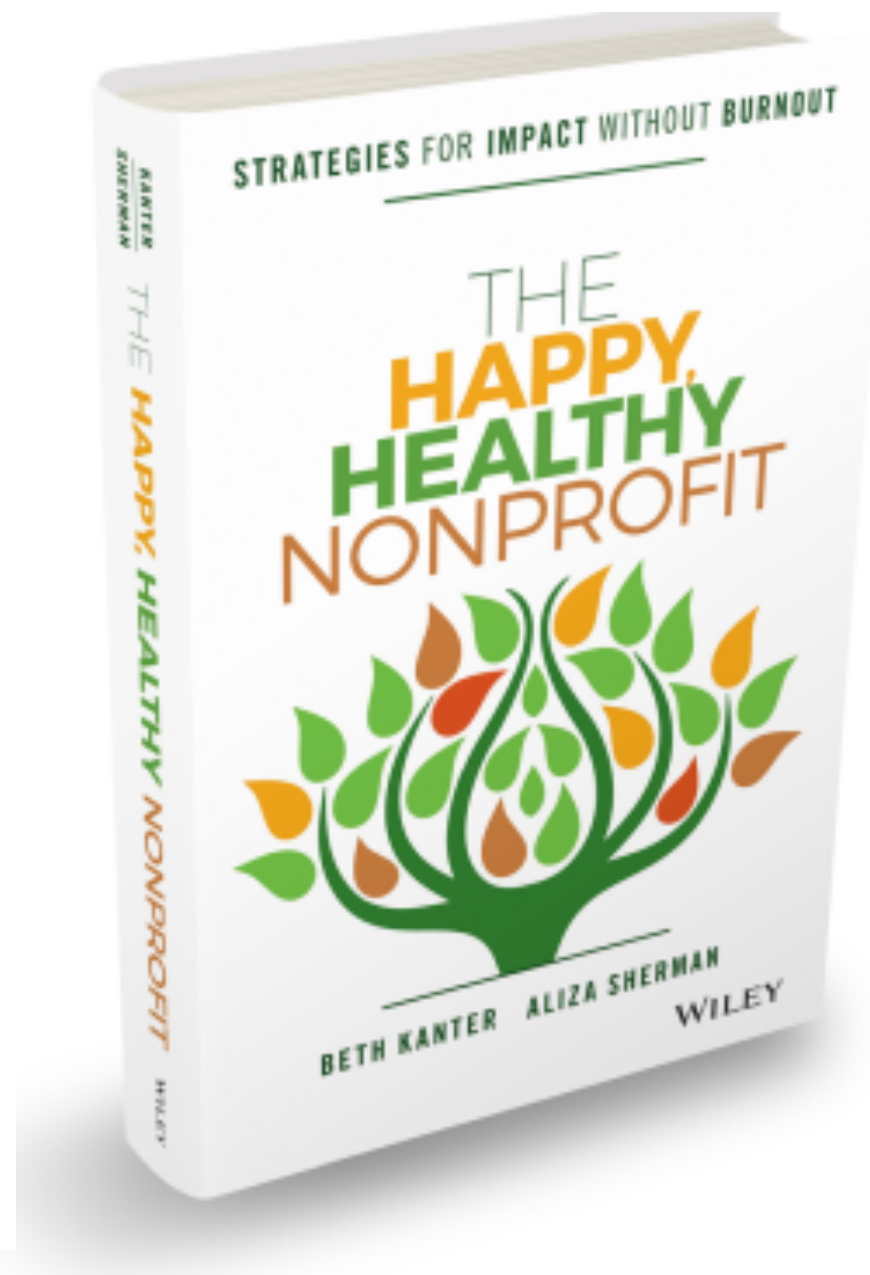
“Fundraisers getting training raised \$37,000 more in major gifts for each training they got.”



# MY NAME'S NOT SUSAN



# 10. TAKE GOOD CARE OF YOURSELF!





# NONPROFIT WITH BALLS

January 25, 2016

## 10 classic movies that could have been about nonprofit work

[Like](#) 779 [Tweet](#) [in](#) [g+](#) [Share](#)



Despite the awesomeness and complexity of our work, and the fact that we employ 10% of the work force, and the fact that independent studies that I have commissioned found that we have the most attractive professionals among all the sectors, nonprofit is still neglected by the




Search ...



Follow NWB by email. Make Mondays suck less.

Enter your email address below





“Faith is taking the first step even  
when you don't see the whole  
staircase.”

Martin Luther King, Jr.



“How lucky I am to have something  
that makes saying goodbye so hard.”  
A.A. Milne, Winnie the Pooh



# YOUR WORD FOR 2017

Words  
have  
Power



# MAKE YOURS LEADERSHIP





don't make  
resolutions,

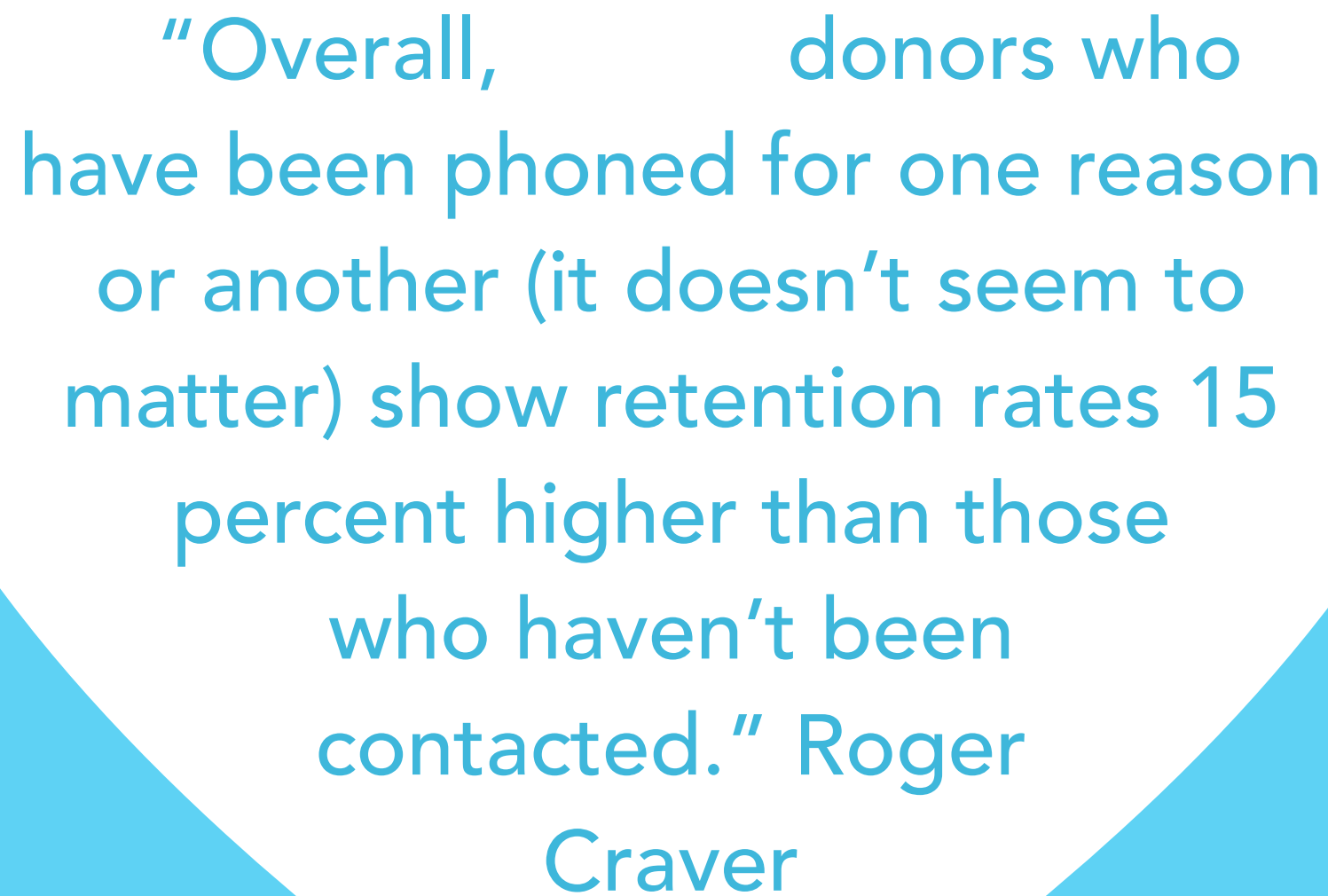
create  
habits



# DAILY







"Overall, donors who have been phoned for one reason or another (it doesn't seem to matter) show retention rates 15 percent higher than those who haven't been contacted." Roger Craver

# BRITTANY'S HOPE



The screenshot shows the homepage of Brittany's Hope. At the top, the logo "Brittany's HOPE" is displayed with the tagline "Aiding Abandoned Children Worldwide". Navigation links include "Adoption Grants", "Child Sponsorship", "Orphan Care", "Fundraising Events", "Donate", "Contact Us", "About Us", "Info", "Site Map", and "Mailing List". A search bar and a "Donate Now" button are also present. The main banner features the text "Adoption is just one way to love a child" and a "Sponsor a Child Today" button. Below this, a paragraph states: "Brittany's Hope is a 501(c)3 non-profit organization dedicated to aiding abandoned children around the world." To the right of this text is a "Make a Donation" button. On the left, there is a "See Hope In Action" section with a sign-up form for updates, including fields for "Email Address", "Name" (First and Last), and a "Sign Up" button. To the right of the form are three images with captions: "Adoption Grants" (a family photo), "Child Sponsorship" (a child holding a cup), and "Orphan Care" (a group of children).

From \$11,000 a year  
to \$160,000 a year online!

# MAKE KNOWING YOUR NUMBERS A HABIT

## The 'Beyond Cash' Fundraising Management Dashboard

Date Completed:

\_\_\_\_/\_\_\_\_/\_\_\_\_  
Month / Day / Year

This dashboard is designed to help nonprofit boards of directors achieve fundraising excellence year over year.

Each indicator is critical. However, if an organization prefers to implement this resource gradually, priority should be assigned from left to right, beginning with Retention Rate and ending with Future Commitment. *See reverse for additional information.*

Example Indicator	Retention Rate	Engagement Index	Median Gift Size	Non-Ask Ratio	New Donor Number	Brand Strength Rating	Future Commitment
GOAL							
CURRENT YEAR							
2 YEARS PRIOR 1 YEAR PRIOR							
Enter your goal (e.g. %, \$, \$) in the top box. Enter actual data for the current year and prior two years in the boxes below the goal.  Below is an example of how that might look.	Measures % of donors retained from prior year.	Determines % of new donors who report having learned of organization through an existing donor or volunteer.	Identifies dollar amount of median (not average) gift in total donor base.	Indicates ratio of non-ask contacts (e.g., gratitude, evidence of impact, or general warmth and kindness) to solicitation contacts.	Counts number of new donors introduced per year.	Reflects, in aggregate, the confidence of board and staff in the strength of the organization's brand – both internally and externally.	Quantifies gift commitments for future years – excluding current year.
Example Indicator	INSTRUCTIONS	INSTRUCTIONS	INSTRUCTIONS	INSTRUCTIONS	INSTRUCTIONS	INSTRUCTIONS	INSTRUCTIONS
85%	Calculate percentage of prior year's donors who gave in subsequent year (e.g., from 2008 to 2009).	Determine % who report being inspired by a volunteer or donor to initially make their gift or become involved with the organization.	Calculate median of all gifts per year. Do not confuse with mode or mean. See reverse for review of the distinction between mean, median and mode.	It is acceptable to set a goal ratio for non-ask contacts and use this as a benchmark, instead of measuring every single contact.	Count number of new donors added per year.	Twice a year, have all board and staff members answer the following: "On a scale of 1 to 10, how confident are you that we consistently & compellingly explain what we do and why we do it?"	List dollar amount of current pledges to become payable over the next three (or five) years.
70%							
67% 68%							
	FOR GREATER DEPTH	FOR GREATER DEPTH	FOR GREATER DEPTH	FOR GREATER DEPTH	FOR GREATER DEPTH	FOR GREATER DEPTH	FOR GREATER DEPTH
	Only after retention rate is adequately measured and managed, determine % of retained donors who increase, decrease or maintain gift size. Additionally, segmenting retention per gift range is very helpful.	Ask what inspired first-time donors to become involved or give. Identify whether the reasons change over time and build on these strengths in programming and marketing.	Set annual goals regarding increasing median gift size. Be conservatively ambitious.	Be creative, innovative and strategic with increasing quality contacts with donors that do not involve asking for money.	Segment new donor numbers for relevance – whether by gift size, geography, or program area.	Once a year, conduct an inventory to see how/ if brand and marketing tools such as logo and messaging are used in materials, both on & off-line. Make them consistent.	Set goals regarding the number of additional pledges to be made annually – then measure and manage performance.

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[Pamela@PamelaGrow.com](mailto:Pamela@PamelaGrow.com)



WEEKLY

*Get out there*



# TIP

Focus on building relationships with individual donors. **Here's a rule you can use each and every week:** don't write a grant, plan an event or send out an appeal until you've set up at least one lunch or coffee meeting with a donor.



# QUARTERLY

*Redo your  
thank you  
letters.*

## Basic Thank You Letter Template

Date Use Times New Roman, 12 or 13 point font.

Fname Lname  
StreetAddress  
City, State Zip

*Jean,  
Your support over the years has  
been invaluable. Thank you so much!  
Lisa*



Dear Fname: Personalized. No exceptions.

**Opening sentence/headline/paragraph.** *Make your donors feel the love!*

*Sample:* You're making real change possible!

Amazed. Inspired. Grateful. That's how your generosity makes me feel.<sup>1</sup>

**Thank.** Do you need to thank them for something specific? Have they made an "in memoriam" gift, or responded to an emergency appeal? Reference the amount.

*Sample:* May it give you comfort to know that your recent donation of \$\_\_\_ to honor the memory of [NAME] will make a difference in the lives of thousands of seniors and their family caregivers across York Region and Bradford West Gwillimbury.<sup>2</sup>

**Show impact.**

*Sample:* Thanks to you, Destiny will be the first in her family to graduate from college.

**How will you be in touch in the future? Include a contact.**

*Sample:* If you'd like to stop in for a tour of our new facilities, give Mary Development a call at 555.555.5555.

**Thank again.**

**Closing**

Sincerely, Handwritten signature please.  
Warmly,  
With gratitude,

*Lisa Richardson*

For the best Thank You letter examples, visit  
Lisa Sargent's clinic on [SOFT](#)

**PS: Thank again...or use the PS for further engagement** - *Sample:* Fname, if you have a few minutes, we'd love to get your thoughts. What would you like to hear more about? How often would you like to hear from us? Let us know by completing the enclosed survey.

Tax deductible language

<sup>1</sup> Sharon Doolittle. <http://socialrazoo.com/2012/07/22-delightful-ways-to-say-thank-you/>

<sup>2</sup> Lisa Sargent. <http://www.soft.org/node/699>



REGULARLY

*Swipe*

# WHY DID YOU SHOW UP TODAY?

- You know you need to do fundraising better, but you don't know what you need to do to get things started.
- Maybe you're frustrated with all the different 'gurus' out there and the glut of fundraising information.
- You just want to learn exactly WHAT to do and HOW to do it to see real fundraising results now... **and long-term.**

# THE OBVIOUS QUESTION...

How do I make all of this work, so I can get things up and running quickly?



# OPTION ONE

*Complicated  
and Confusing*

# OPTION TWO

*Simple and  
Strategic*

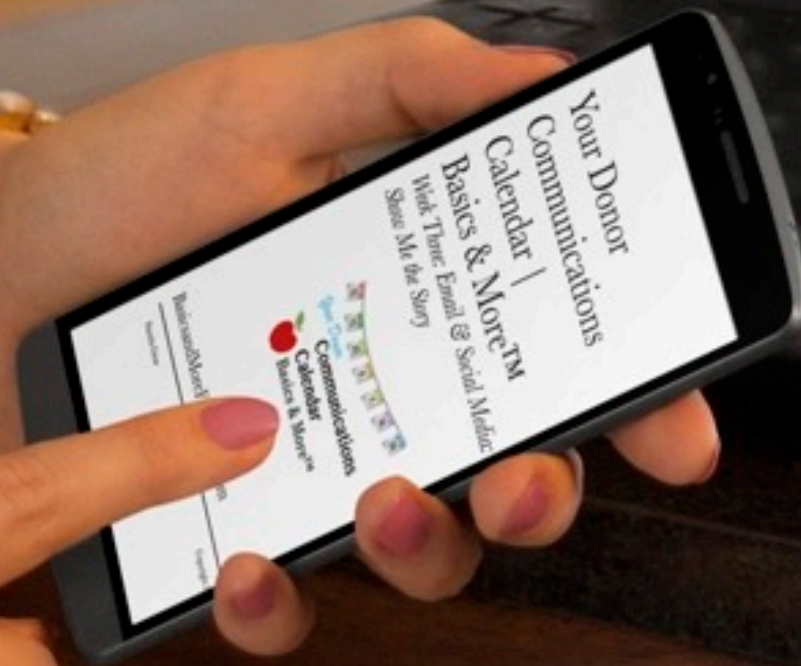
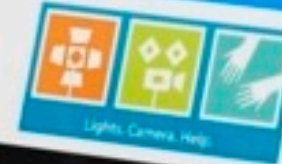


Basics & More™

*Join me*

Create Powerful Videos  
On a Small Budget

Aaron Bramley  
aaron@lightscamerahelp.org  
@AaronMSB







## SIMPLE DEVELOPMENT SYSTEMS

THE MEMBERSHIP PROGRAM

GET INSTANT ACCESS NOW

*Join me*

It's easy to get fired up at the beginning of the year with exciting ideas for finally tying together your fundraising efforts with online giving, redoing your website, creating a plan for individual giving and major gifts, grants, social media... and then: Your ED rushes in with a grant opportunity one of the board members told her about -- and the deadline is tomorrow!

Is this you?

- Your website hasn't been updated in months -- and your 'webmaster' isn't responding to your calls or emails



**SIMPLE**  
DEVELOPMENT SYSTEMS  
Donor-centered fundraising made easy

# BASICS & MORE™

The All Access Ticket is the single **most comprehensive nonprofit training program** for focusing YOU on the important fundraising strategies for long-term success.



# A YEAR OF FOCUSED TRAINING





# WHAT YOU GET

- Twenty (plus) courses on topics ranging from our current creating *Your Donor Communications Calendar*, to board fundraising, to monthly giving, to planned giving, to direct mail, to online fundraising, to storytelling, to stewardship, to major gift fundraising - and more.
- Recorded webinars featuring respected experts like Tom Ahern, Erica Waasdorp, Rory Green, Lori Jacobwith, John Lepp, Lynne Wester, John Haydon, and more.



"THANK YOU... for being the wind beneath my wings. These words seem so inadequate to express my gratitude for all that you have taught me this past year.

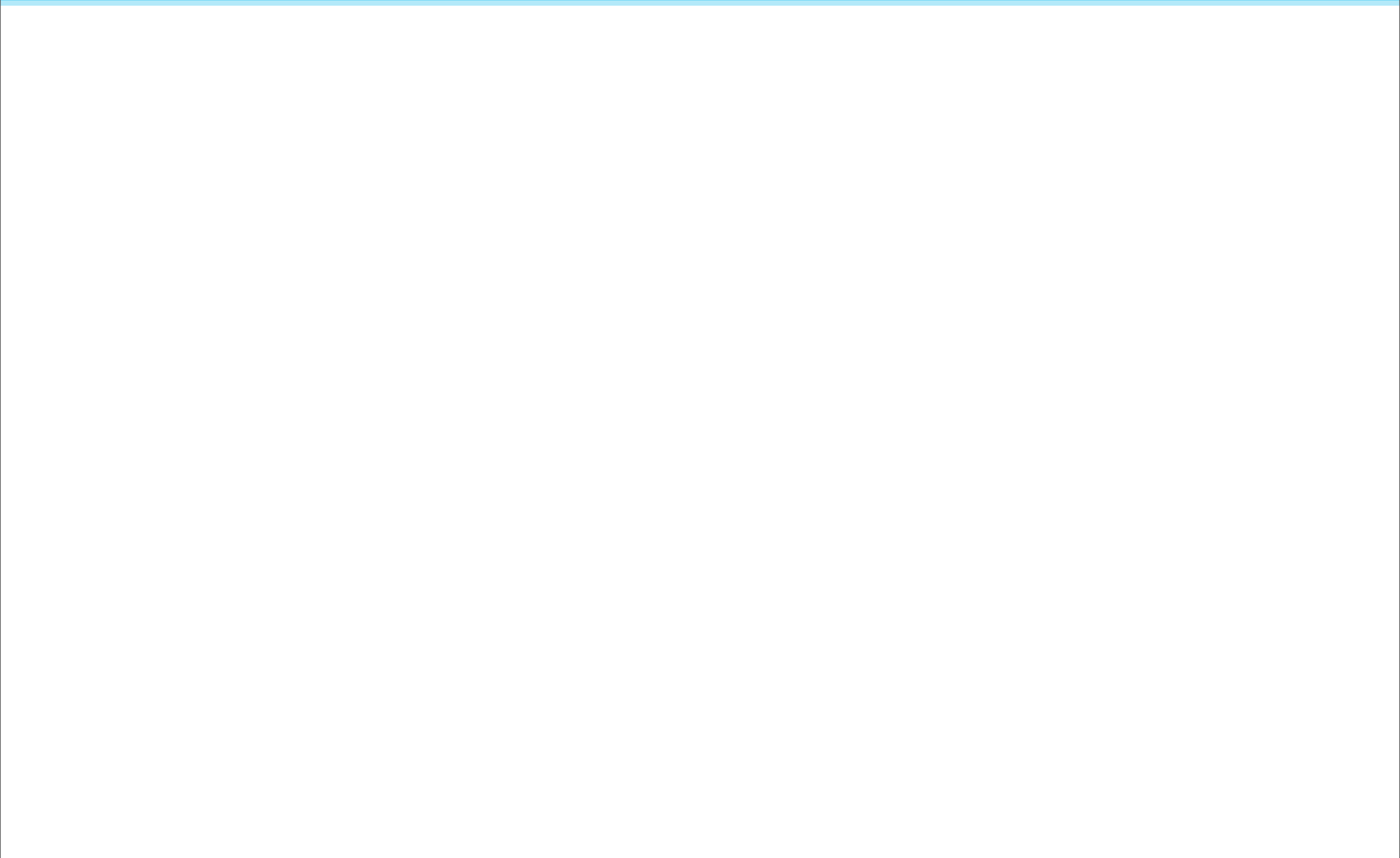
Your emails are a blessing. I receive many from well-known CFRE gurus but NONE are as useful as yours. Most are content marketing pieces aimed at selling ebooks, Webinars, or expertise. Yours, on the other hand, have one simple goal – empowering people to raise money for causes they are passionate about." Rachel Ramjattan

Special Projects Coordinator

Catholic Charities of the Archdiocese of Miami, Inc.



Go to: <http://basicsandmorefundraising.com/join>



# YOUR INVESTMENT

\$549.99

(or 3 Installments of  
\$183.33)



# FAST ACTION BONUS

Between now and Friday  
January 27, you can get into  
the Basics & More™ All Access  
Ticket at \$100 off the full price

**100TICKET2017**

# GO TO



Go to <http://basicsandmorefundraising.com/join>

## Here's How You'll Explode Your Fundraising...

	B&M Ticket \$549.99 (or 3 installments of \$183.33)	SDS Membership \$699.99 (or 3 installments of \$233.33)
THE ENTIRE ROSTER OF 20+ BASICS & MORE CLASSES (Including Monthly Giving, Board Fundraising, Online Giving, Smarter Event Planning, The Power Of Thank You and more)	✓	✓
EMAIL SUPPORT FOR EVERY CLASS	✓	✓
ENROLMENT FOR UP TO EIGHT TEAM MEMBERS	✓	✓
PRIVATE FACEBOOK GROUP FOR EVERY CLASS	✓	✓
SIMPLE DEVELOPMENT SYSTEMS: Fundraising for Small Shops Book	✗	✓
FIVE DAYS TO FOUNDATION GRANTS BOOK	✗	✓
MONTHLY WEBINARS PRESENTED BY LEADING EXPERTS	✗	✓
ACCESS TO OUR ARCHIVES OF DOZENS OF WEBINAR TRAININGS FROM NON-PROFIT PROS (including Kivi Leroux Miller, Amy Eisentein, Jeff Schreifels, Tom Ahern, Gail Perry & more)	✗	✓
MEMBERS ONLY DISCOUNTS ON PRODUCTS (including non-profit best practices, Bloomerang Solutions & more)	✗	✓
MONTHLY LIVE ONE ON ONE COACHING CALLS	✗	✓





QUESTION TIME

Thank  
You!