

EMERGO - Consultants in Philanthropy

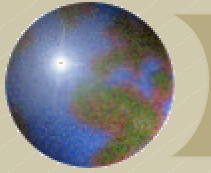
Welcome to a
Major Gifts Seminar
for

**The Land Trust Alliance
of British Columbia**

March 28, 2003

10:00 to 11:30 AM

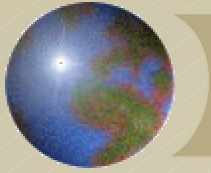
The Cowichan Lake Outdoor Education Conference Centre
Cowichan Lake, Vancouver Island BC



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Plan For Today

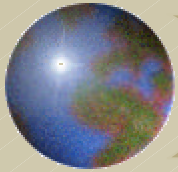
- ◆ Ideas on Philanthropy
 - ◆ Why Donors Give
- ◆ Driving Factors & Principles of Fundraising
 - ◆ Annual – Major – Planned Gifts
 - ◆ Annual Fund
 - ◆ Asking
 - ◆ Cultivation & Steps to Giving
 - ◆ Fear of Rejection & The Art of Asking
 - ◆ Stewardship
 - ◆ Wrap Up



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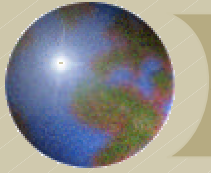
"Philanthropists do not come to their role through a single act of generosity, but rather through a long pattern of growth."

- Sublett



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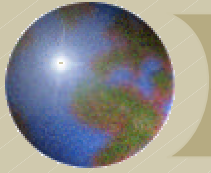




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Why Donors Give

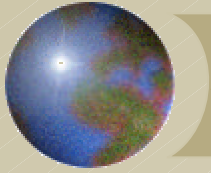
- ✦ To experience the joy and happiness of giving.
- ✦ Because the asker does not twist arms, but offers an opportunity to meet certain needs
- ✦ Because they are asked.
- ✦ Because of a relationship between the donor and the organization and/or asker.
- ✦ To make a difference.
- ✦ Tax advantages.
- ✦ Recognition.



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The Driving Factors for a Successful Fundraising Program

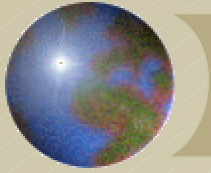
- ✚ **Mission**
- ✚ **Leadership**
- ✚ **Strategic Plan**
- ✚ **“Total Development”**
- ✚ **Instruments**



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The Driving Factors for a Successful Fundraising Program

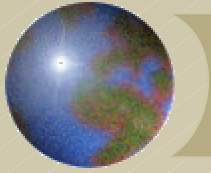
- ✦ **Mission** – The Mission of the organization needs to be a finely honed and widely accepted short written statement - combining its heritage with its work of today.
- ✦ **Leadership** – The organization is its people; they must be committed to our Mission. It requires the drive of everyone; it cannot be luke-warm or half-hearted, it must be commit or quit.



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The Driving Factors for a Successful Fundraising Program

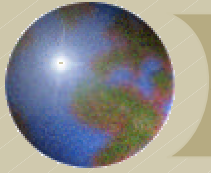
- ❖ **Strategic Plan** – The development of an organization will only be driven by an achievable Strategic Plan with defined goals, framed by specific strategies and actions that are supported with budgetary consideration. The Strategic Plan is in reality a continual process of examination and discovery, of dreaming and reality, of risk and hope focused on the implementation of Mission.



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The Driving Factors for a Successful Fundraising Program

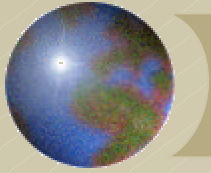
- ✦ **“Total Development”** – To raise the required moneys needed to support and carry the Strategic Plan an organizations needs to focus on more than just a sound development plan.
- ✦ **Instruments** – The instruments for cultivation and solicitation are derived from the Strategic Plan. The case statement is continuously adapted for the donor.



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“These Americans are peculiar people. If, in a local community, a citizen becomes aware of a human need which is not being met, he thereupon discusses the situation with his neighbours. Suddenly, a committee comes into existence. The committee thereupon begins to operate on behalf of the need and a new community function is established. It is like watching a miracle, because these citizens perform this act without a single reference to a bureaucracy, or any official agency.

- Alexis De Toqueille

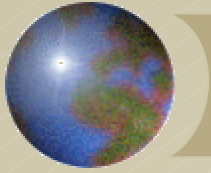


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Philanthropy is voluntary action for public good, and it is based on values. We do not give to, ask for, join, or serve organizations whose values are inconsistent with our own. Fundraising is the process of enabling people to act on their values.

“Apart from the ballot box, philanthropy present the one opportunity the individual has to express his meaningful choice over the direction in which our society will progress.

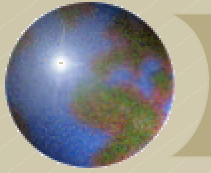
- George Kirstein



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A gift...

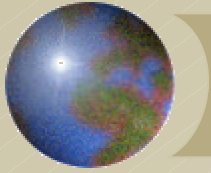
**like a suit should be
tailored to the individual.**



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Principles of Fundraising

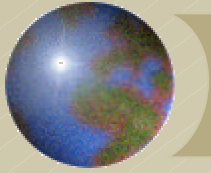
- ✦ There is no quick fix – systems and structure are needed to endure over time.
- ✦ Philanthropy is the context for value driven fundraising.
- ✦ Stewardship must be practiced with diligence.
- ✦ The process of asking should be one in which the asker feels the pride of inviting investment and in which the donor feels not pressure, but release.
- ✦ Donors do not give to organizations because organizations have needs: they give because organizations meet needs.



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Principles of Fundraising

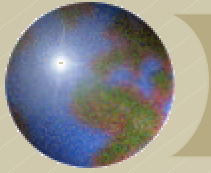
- ✦ Fundraising is less about money than it is about relationships.
- ✦ Philanthropy is a participatory and democratic process that involves giving, asking, joining and serving.
- ✦ There are three levels of involvement and practice for staff and volunteers: philosophical, strategic and tactical



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Integration of Balanced Overall Advancement Plan

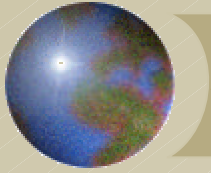
1. Annual Fund
2. Major Gifts
3. Planned Giving



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Annual Gifts

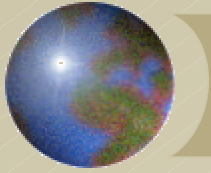
- ✦ Primary focus on the institution
- ✦ Timed to needs of the institution
- ✦ 25% of time spent preparing; 75% of time spent asking
- ✦ Solicited once a year against short-term deadline
- ✦ Volunteers take from 5 - 15 assignments
- ✦ Usually given in cash from current income
- ✦ Generally unrestricted
- ✦ Results - \$10 to \$?



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Major Gifts

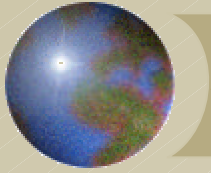
- ✦ Primary focus on the donor
- ✦ Timed to life cycle and circumstance of donor
- ✦ 95% of time spent preparing; 5% of time spent asking
- ✦ Solicitation timed to donor's capacity and readiness
- ✦ Natural partners nurture 1 - 5 highly personal relationships
- ✦ Usually made from capital over period of time
- ✦ Generally restricted
- ✦ Results - Serious commitment of significant resources



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What is a Planned Gift?

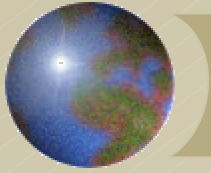
In its simplest form a planned gift is a gift that requires thought.



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The Annual Fund

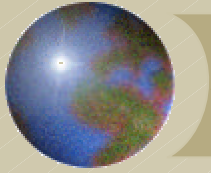
- ✦ Generates support on an annual basis
- ✦ It is inclusive - involves all constituents
- ✦ Typically brings in smaller donations, but more of them
- ✦ Provides operational financial support
- ✦ Renew donor support annually
- ✦ Cultivate donors to increase giving levels
- ✦ Solicit new donors to broaden the base of support
- ✦ Identify and develop volunteer leadership
- ✦ Help educate constituents about our organization's work
- ✦ Identify and develop major gift prospects
- ✦ Build donor loyalty



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Elements of a Successful Annual Fund

- ✦ Board Leadership
- ✦ Participation of Volunteer Teams
- ✦ A Plan
- ✦ A Goal that is realistic but a “stretch”
- ✦ A carefully constructed List of Prospects
- ✦ Strategies that include all Donors in a continuum of investment opportunities
- ✦ Energize the volunteers with training that informs, motivates and inspires
- ✦ Be sure support staff and material are ready to enhance the volunteer experience
- ✦ Celebrate achievements

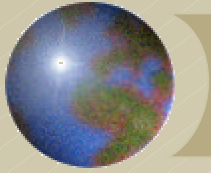


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Asking Ladder of Effectiveness

(most to least)

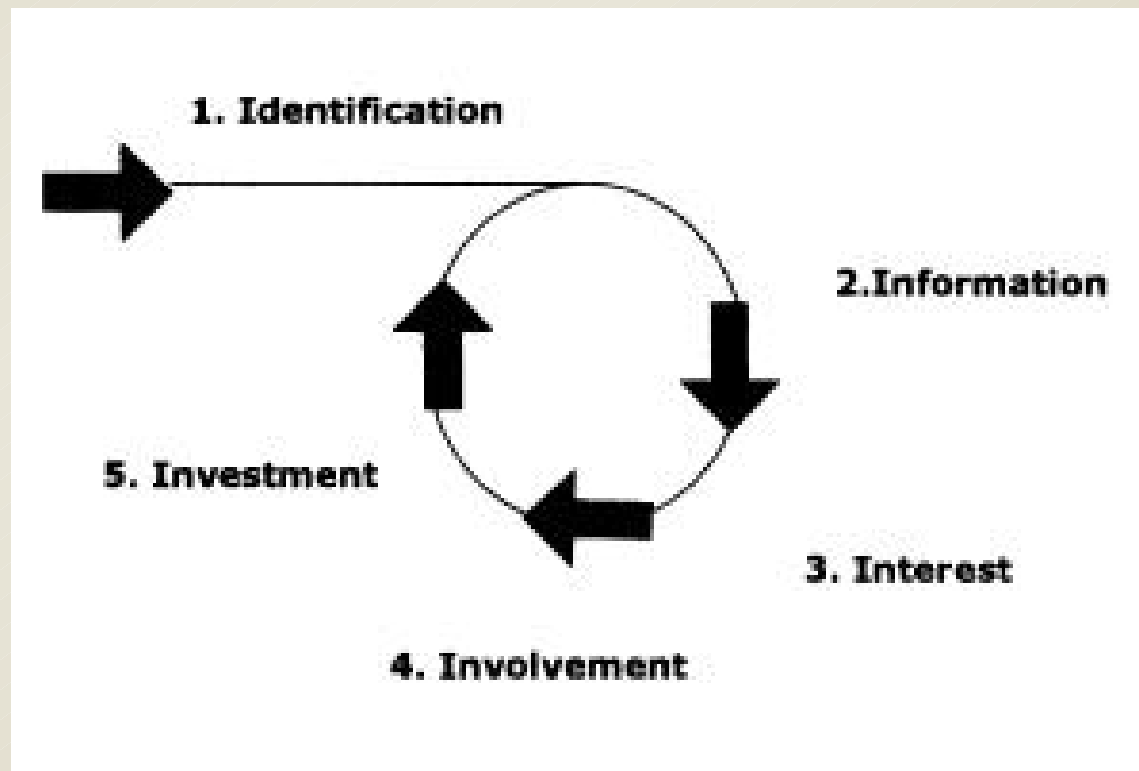
- ✦ Person to Person
- ✦ Personal Letter with phone follow up
- ✦ Personal phone call with follow up letter
- ✦ Personal phone call
- ✦ Fund raising benefit event
- ✦ Impersonal letter/direct mail
- ✦ Donor to door
- ✦ Impersonal telephone call (telemarketing)
- ✦ Media advertising

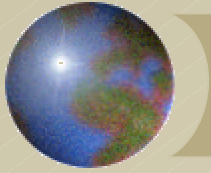


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The Cultivation Cycle

1. Identification
2. Information
3. Interest
4. Involvement
5. Investment

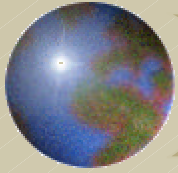




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Steps to Giving

- ⊕ Awareness
- ⊕ Knowledge
- ⊕ Interest
- ⊕ Caring
- ⊕ Participation
- ⊕ Commitment

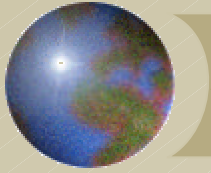


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Overcoming the Fear of Rejection

HORRIBLE HAGAR

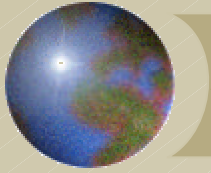




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Overcoming the Fear of Rejection

- ✦ An understanding of the importance of the need the organization is meeting and the impact a gift will have.
- ✦ A passion for the organization or project.
- ✦ An adequate information about the organization to feel capable of handling objectives.
- ✦ An adequate information about the prospect to feel knowledgeable about interest and concern.
- ✦ Training in how to ask.
- ✦ Support from staff or volunteer leadership, including appropriate materials, research and resources.

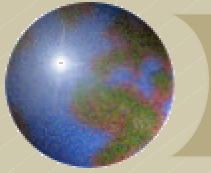


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The Art of Asking

There is no magic secret to being a good caller. The great majority of us find the task of asking others for a donation difficult. Your success in soliciting rests upon the attitude with which you approach your calls.

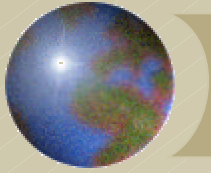
- ✦ You must feel comfortable!
- ✦ To feel comfortable you must have a strong belief in the project & the institution.
- ✦ Take time to prepare and think about what to say.
- ✦ Make Your Own Gift First: It is much easier to ask someone else to contribute to the Annual Fund if you have already made a gift yourself.



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The Art of Asking

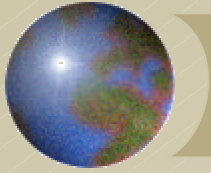
- ✦ The first call will be the hardest and then it gets easier with each call.
- ✦ Start with the best prospects: If possible make your first call to someone you will feel comfortable talking to. Making a few successful calls will increase your confidence and skill as a caller.
- ✦ There is no reason to feel embarrassed about making a solicitation call. You are not calling for yourself, you are asking on behalf of French Community Radio for an important and worthwhile cause.



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The Art of Asking

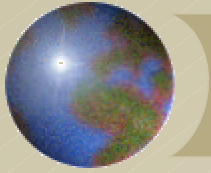
- ✦ If you do not know the answer to a question or if a caller has any concerns that you feel should be addressed by others - tell them that someone who would be able to answer their question will get back to them. Make notes of the call and inform the appropriate person.
- ✦ Try to relax and be yourself. You are not only fundraising, you are friend raising.



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“Every organization has within its broad family individuals with the required financial resources to enable the completion of a bold dream. They must be identified, engaged, educated and asked for their support. However they will not support a dream, unless it is built on the strong foundation of a viable strategic plan and committed leadership giving.”

- John Davies

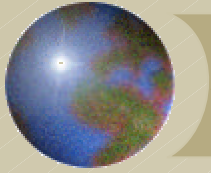


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Stewardship

Stewardship, the continued involvement, cultivation, and care of those who give.

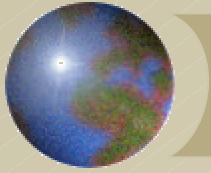
- ✦ Gifts are the symbols of the donor's belief in the values, purpose and importance of the organization.
- ✦ Identifies the importance of donors as well as their gifts.
- ✦ Donors are drawn more deeply into a reciprocal relationship.
- ✦ The ethical management of all human and financial resources.



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Stewardship

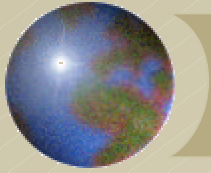
- ✦ Promotes donor-organization relationship based on mutual respect.
- ✦ Moves donor to investor.
- ✦ Satisfied Donors draw others to the table.
- ✦ People want to belong to the success of an organization. They want to participate.



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Principles of Stewardship

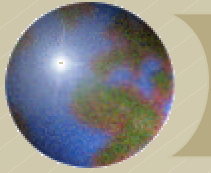
- ✦ Begin involving donors in the stewardship program with their first gift.
- ✦ Alternate messages to donors, not always an ask.
- ✦ Allocated budget to stewardship activities.
- ✦ Be sure the stewardship practice is appropriate to the amount of the gift and the budget and image of the organization.
- ✦ Determine what kind of involvement your major gifts and planned gift donors, some of whom maybe very busy with other organization and their own professions, want.



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Principles of Stewardship

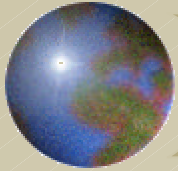
- ❖ Coordinate stewardship and cultivation outreach, so that current donors have an opportunity to convey their enthusiasm and commitment to prospective donors.
- ❖ Tie stewardship outreach to organization's mission.
- ❖ Focus on intangible, rather than tangible, benefits.
- ❖ Maintain stewardship with long-time and generous donors, even when their giving flags.
- ❖ Establish relationships between donors and program staff whenever possible



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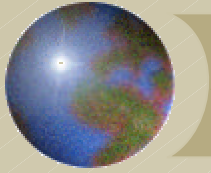
"Be bold and daring. Go after your top prospects with persistence and passion, and all the vigor and zeal you can muster. You will be hurt more by those who would have said 'yes' but where not asked, than by those who say 'no'. Few commandments in fundraising are as sacrosanct as this."

- Jerold Panas



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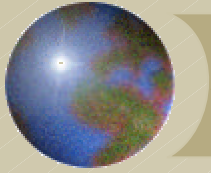




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“Vision without action is merely a dream,
Action without vision is a poor use of time,
Vision with action can change the world.”

- Joel Barker



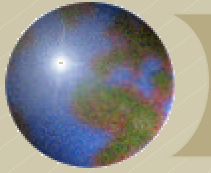
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I make a difference!

I will make the difference!

The _____ Land Trust

Is counting on me!



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**“Dream your dream,
make it a great dream
and dream it greatly.”**

- Père Athol Murray