Secrets of Fundraising Success for Small Nonprofits

Sandy Rees, Get Fully Funded
Today’s Presenter

Sandy Rees, CFRE
Fundraising Coach
Fundraising...

Can be a challenge no matter how big your shop is.
You wear many hats
The secret to success in the small shop is...
Leverage
Leverage is...

... the mechanical advantage or power gained by using a lever.
In fundraising, you must leverage

- Yourself
- Your office
- Your time
- Your opportunities
Leverage Yourself

- Play to your strengths
- Surround yourself with support
- Keep your head in the game
Play to Your Strengths

- Do only those things that you can do
- Delegate, automate, or dump everything else
Where Do You Spend Your Time?

<table>
<thead>
<tr>
<th>Unique talent and ability</th>
<th>Excellence</th>
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</thead>
<tbody>
<tr>
<td>Competent</td>
<td>Incompetent</td>
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</table>
Surround Yourself with Support

What supports you?
- Routines & good habits
- Structure
- Systems
- Mentor or coach
- Friends & family
- Exercise
- Chocolate
- What else?
Mindset is the **biggest** cause of fundraising failure
What is Mindset?

Mindset is your consistent attitude or disposition that determines how you will respond to and interpret situations in your life.

It’s the filter through which you see the world.
Whatever you believe becomes your reality.
A Tale of Two Frogs
Keep Your Head in the Game

- Be passionate about your cause and the lives being changed.
- Believe in yourself and what you’re doing.
- DO NOT accept status quo!
- Be a lifelong learner.
Set clear goals and then work toward them.
Say “no” to everything else.
Work in your unique brilliance
Focus, focus, focus!
Plug the Time Leaks

Time leaks are those few minutes here and there that eat up your day.

- Close your email during the day
- 5 minutes ONLY for Facebook and Twitter!
- No computer games
- Minimize personal phone calls
- Minimize chatting with co-workers
During the Day...

Spend time only on those things that:
- Directly raise money
- Increase your ability to raise money
- Spread the word about your organization
- Build relationships with donors and supporters
Leverage Your Office

- Stay organized
- Use the right software
- Recruit extra hands to help you
- Create systems
Stay Organized

- Keep the clutter to a minimum.
- Touch each piece of paper only once.
- Create and use a filing system that works for you.
- Keep a list of task debts.
Use the Right Software

- What do you need?
- What do you have?
- Are you using it effectively?
Fundraising is a Team Sport
Recruit Help

- Be clear about volunteer jobs
- Be prepared to spend time with volunteers
- Prepare other staff to welcome volunteers
- Orient vols and help them feel comfortable
- Thank them and show your appreciation!
Let’s Talk Systems!

A system is a method of doing something so that you get the same result every time, no matter who is using the system.
Create systems for anything you do more than once.
Examples of Systems

- Gift entry
- Thanking donors
- Creating a newsletter
- Updating a website
- What else?
Systems are Best When...

- They are in writing.
- They are clearly understood by all those who will use them.
- They are reviewed from time to time to make sure they still work.
Leverage Your Opportunities

- Pick low-hanging fruit
- Choose opportunities that reward you well
  - Donations
  - Publicity
  - Goodwill
Plan for Success

- Create and use a written plan for marketing and fundraising
Focus on the Prize

- Focus on the fundraising activities that will give you the most “bang for the buck.”
- Reduce the number of special events you host.
- Spend more time with individual donors.
Free Gift!

Get help putting a fundraising plan together using my ebook “Sandy’s Favorite Planning Worksheets”.

www.GetFullyFunded.com/FreeGiftFromSandy
Questions?
WealthEngine Analytics:
Optimized Fundraising for Your Mission

Jeff Lubitz, Senior Vice President, Sales
Essentials for Fundraising Analytics
What is Analytics?

**Analysis** is the process of breaking a complex topic or substance into smaller parts to gain a better understanding of it.

**Analytics** is the process of developing optimal or realistic decision recommendations based on insights derived through analysis.

= DATA DRIVEN DECISION MAKING
Fundraising from the Same People?

- Current decisions for many fundraising offices are driven by the individuals in the database that are already known.

- This leads to consistently relying on the same people and creating donor fatigue.
The WealthEngine Difference

<table>
<thead>
<tr>
<th>Bringing Together Data from Multiple Sources is a Challenge</th>
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<tbody>
<tr>
<td>The same information can be represented in a variety of ways</td>
</tr>
<tr>
<td>Names can be shortened, changed or interchanged</td>
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<tr>
<td>Data is updated at varying intervals</td>
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<thead>
<tr>
<th>WealthEngine Extracts the True Value of Data</th>
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<tbody>
<tr>
<td>Parse</td>
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<tr>
<td>Transform</td>
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<tr>
<td>Clean</td>
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<td>Normalize</td>
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<th>WealthEngine’s Core Value Proposition</th>
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<tr>
<td>Knowledge of wealth data</td>
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<tr>
<td>Rich profiles complete value of data &amp; intelligence</td>
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<tr>
<td>Scores extract greater insight from data</td>
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Take Your Wealth Append to the Next Level

The value of Predictive and Statistical Models...

- Identify the characteristics that define your top donors
- Find new prospects that mirror those donors
- Focus efforts on those who have both the wealth and an affinity for your cause
- Rank your donors and prospects based on likelihood to give
- Develop data-driven strategies across the fundraising lifecycle
### Ratings based on Financial and Non-Financial Significance

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<tr>
<th></th>
<th>Description</th>
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<tbody>
<tr>
<td><strong>Total Assets</strong></td>
<td>The total value of all financial and non-financial assets held by a household, derived from varying asset components</td>
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<tr>
<td><strong>Liquidity</strong></td>
<td>A measure of financial assets that are readily accessible (e.g. checking, savings, money market accounts, etc.)</td>
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<tr>
<td><strong>Estimated Annual Donations</strong></td>
<td>An estimate of charitable donations an individual may give in a year</td>
</tr>
<tr>
<td><strong>Net Worth</strong></td>
<td>The difference between total assets and total debt for a household</td>
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<tr>
<td><strong>Giving Capacity</strong></td>
<td>A measure of a constituent’s capacity to give over a 5 year period based on wealth characteristics and giving trends - correlates to overall wealth</td>
</tr>
<tr>
<td><strong>P2G Score</strong></td>
<td>A measure of a constituent’s propensity to give philanthropically based on various data sources, capacity and inclination to give - correlates to overall wealth</td>
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</tbody>
</table>
Find New Connections: Circle of Friends

Leverage business and social circles of clients & prospects...

- Identify connections
- Create an Inner Circle
- Easily track who knows who

Jane Marsden

Marsden Family Foundation
Leslie Marsden
Sam Marsden
Wes Marsden

Wes has given a $500,000 gift to a theatre, serves on two boards and also knows Sarah Manson

Hospital Board
Sarah Manson
Jeff Gleason
Nate Turner

Jeff is an active philanthropist who knows two of your board members and one major donor

Corporate Board
Joe Smith
Jane Brown
Jennifer Davis
Three ways to use WealthConnect...

**Import**
Incorporate fields for wealth data and analytics into the DMS/CRM

Leverage the reporting tools in your DMS/CRM

**Connect**
Establish a direct link from the DMS to WealthEngine

When viewing an individual’s record in the DMS, simply click a button to open a new window with the WealthEngine search results for that person

**Update**
Integrate wealth data, ratings & scores into donor records

When viewing an individual’s record in the DMS, simply click a button to see up-to-date wealth data and scores, from within the DMS
The WealthEngine Solution

Who are my best donors and prospects?
Analytics allows you to draw conclusions and make informed decisions.

What can I learn about these people?
In-depth, contextual information to better understand each of your prospects.

How can I find more prospects just like them?
Leading tools to build your prospect pipeline and thoughtfully expand your reach.

What strategies should I use to reach them?
Customized insight and advice to develop and execute your fundraising strategy with precision.

*Fully integrated. Scalable. Best in class. Your results are ready.*
Questions?