

# 10 Ways to Optimize Fundraising & Secure More Funding

# Hi, I'm Kate!

This is my 15<sup>th</sup> year attending NSPS!

I've served in leadership roles for a wide range of environmental, sailing education and mission-based organizations and worked on numerous projects ranging from grassroots nonprofit organizations to multimillion-dollar capital campaigns.

I love working with clients! My passion is to help sailing programs design strategies that increase capacity and leverage philanthropy.

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**Annie!**



Intertidal Ventures LLC works collaboratively with organizations to design innovative ways to increase organizational capacity and leverage philanthropy to create impact.

Principal partners, Kate Neubauer and Heather Ruhsam, have over 30 years of combined experience and expertise in nonprofit management, fundraising, sponsorship, marketing, and events with a special passion for the environment, youth experiential learning and sailing education.

Intertidal Ventures has an extensive portfolio of clients and projects, ranging from grassroots nonprofit organizations to multimillion-dollar capital campaigns.

**[www.intertidalventures.com](http://www.intertidalventures.com)**

# Is Your Organization..

- Consistently worried about raising money?
- On track to meet all its fundraising goals?
- Taking advantage of all the funding opportunities available?

# Are Your Donors...

- Engaged?
- Increasing their support?
- Energized and excited by the work and mission of your organization?

# In this workshop we will:

- Address common fundraising challenges
- Provide actionable solutions
- Create a plan you can bring home to your sailing program

# The Ultimate Goal

An engaged community that champions the mission via volunteerism, advocacy, and investment (inclusive of board members, volunteers, and community supporters).

**Doesn't that sound amazing?!?!**

# What is Philanthropy?

Philanthropy can be defined as voluntary action for the common good. Many talk about fundraising as the engine that drives philanthropy or the essential partner of philanthropy.

Your organization is not just a sailing program; it's a **sailing program** and a **philanthropic organization**. Indeed, it might be said that successful nonprofits pursue two missions: program and philanthropy. Everyone is a fundraiser!



**“It is easier to get someone who cares to give you money than to get someone with money to care.”**

@RoryJMGreen



# What does Philanthropy look like in 2019?

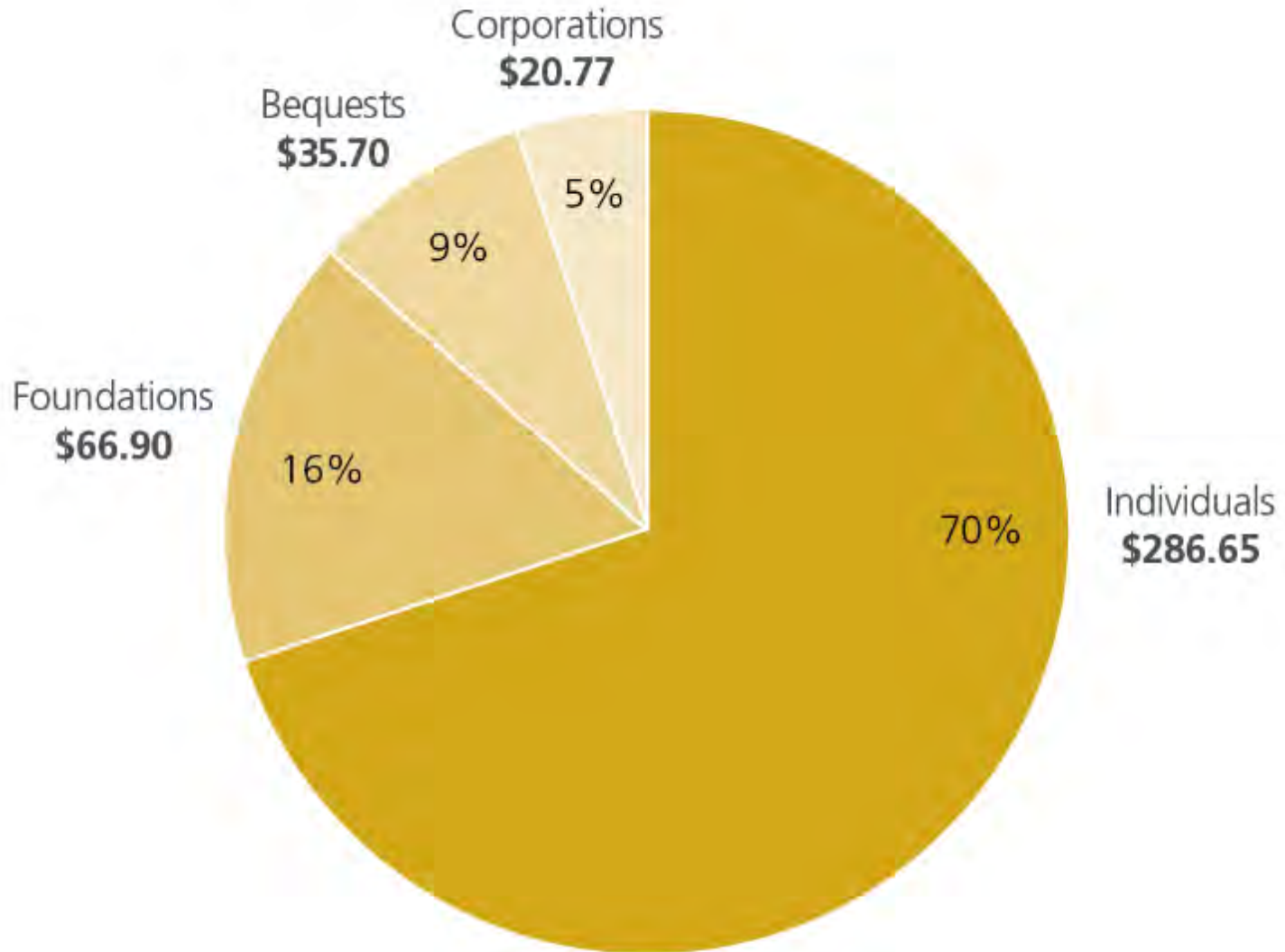
# \$410 Billion !!!!!

*-Annual Report on Philanthropy for the Year 2017, Giving USA*

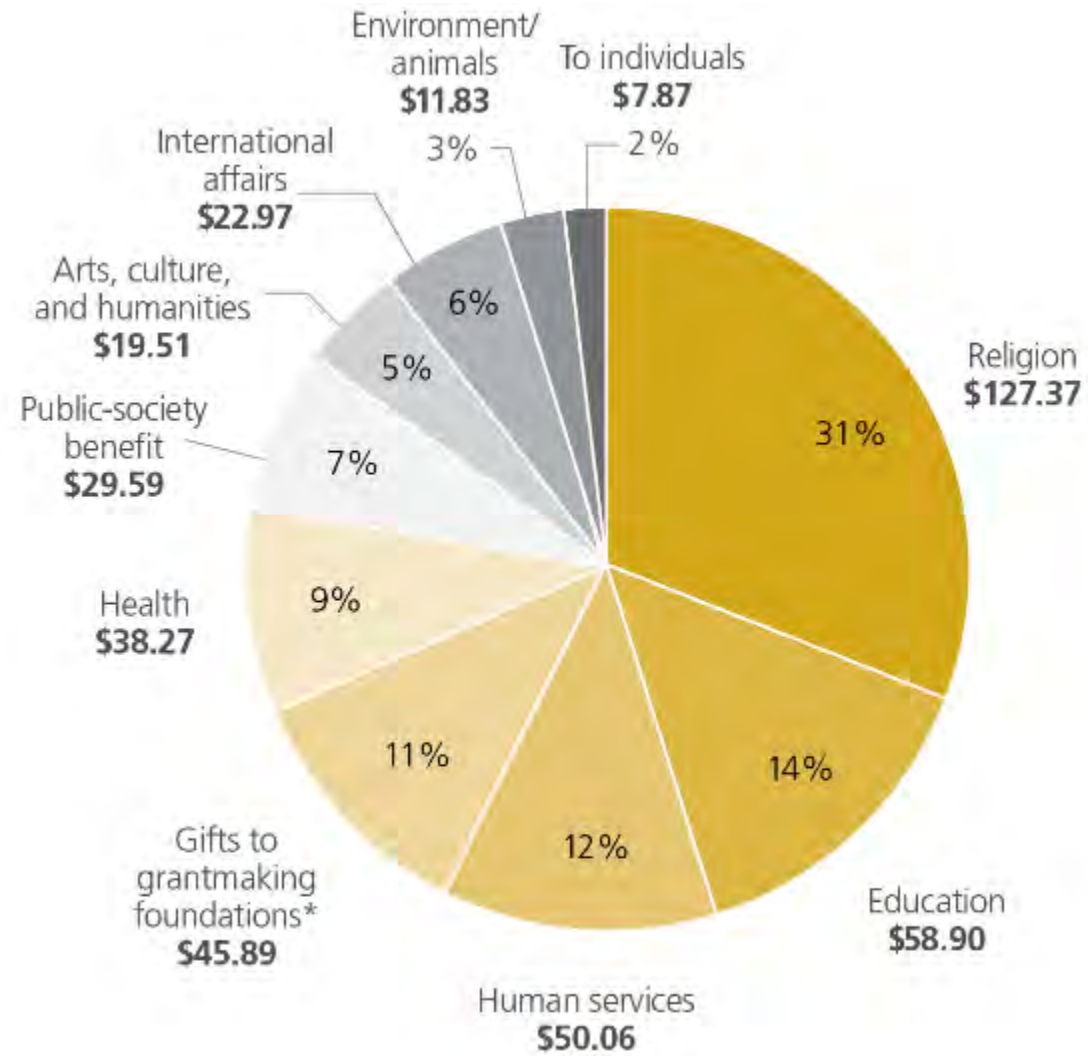
# Trends in total giving, 1977–2017 (in billions of dollars)



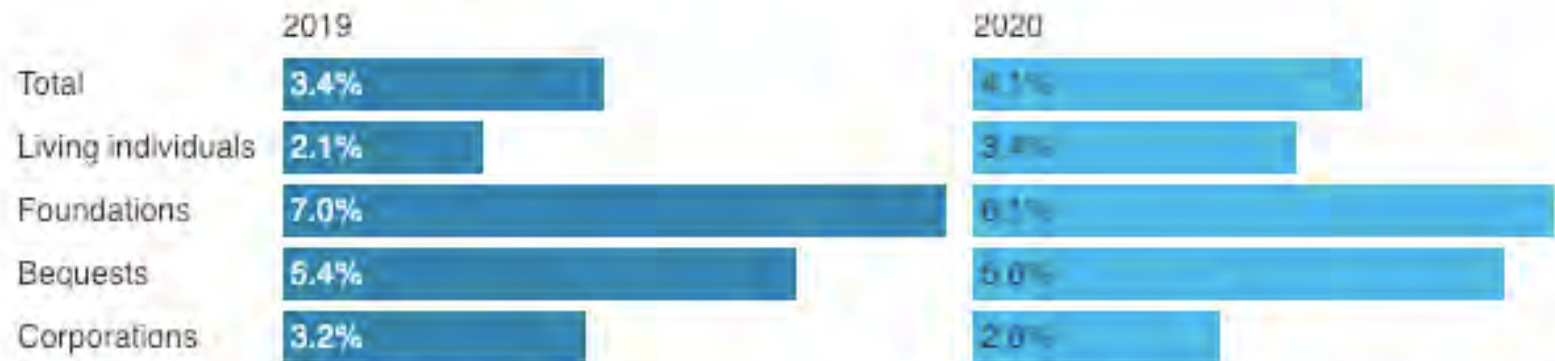
2017 contributions: \$410.02 billion by source  
(in billions of dollars – all figures are rounded)



# 2017 contributions: \$410.02 billion by type of recipient organization (in billions of dollars – all figures are rounded)



## How Giving Is Projected to Grow



Source: "The Philanthropy Outlook 2019 & 2020," Lilly Family School of Philanthropy and Marts and Lindy - [Get the data](#)  
- Created with [Datawrapper](#)



# 10 Ways to Optimize Fundraising



**“Philanthropy is a sacred proposition based on trust and there are no shortcuts to trust.”**

*- Barbara G. Stowe of Counsel, Marts & Lundy*

# 10 Ways to Optimize Fundraising

1. Check public information
2. Make it personal
3. Listening Tour
4. Skill up
5. Build a “toolbox”

6. Focus on quality over quantity
7. Track progress + share
8. Stay in touch
9. Look forward
10. ASK!

# Developing a Message of Impact





**“WE”**

Messaging needs to move from an emphasis on the tin-cup mentality and donor benefits, to an emphasis on the social impact a nonprofit is creating.

# IMPACT

Before

# IDENTITY

It's not about **WHO** the  
organization is,  
it's about the **IMPACT** the  
organization makes.



# The language of your organization should address the following key questions:

- **Need**  
What is the problem that your organization trying to address?
- **Activities**  
What are your organization doing to address this?
- **Outcomes**  
• What are the results of these activities?
- **Evidence**  
How do your organization know you've made a difference?
- **Lessons Learned**  
How will you change your work for the better?

An Annual Fund Case for Support should contain **REALLY GOOD** answers to the following questions...

1. Why does this organization exist?
2. How does the organization translate its mission into output?
3. What measurable output has the organization achieved?

**If you can't explain it  
in 50 words, you won't  
be able to explain it in  
500.**

# Six Stages of Annual Fundraising



# But First Let's Discuss the Difference Between....

## Sources

- Individual Contributions
- Foundations & Gov't Grants
- Sponsorship
- Events

## Uses

- Annual Fund
- Special Projects
- Capital Campaigns

# Six Stages

1. Ensure Readiness
2. Plan + Prepare
3. Craft Strategy
4. Implement
5. Measure + Monitor
6. Refine



# The First 3 Stages Make All the Difference!

## One:

### Ensure Readiness

- High Performance
- Documentation
- Systems
- Internal Capacity

## Two:

### Plan + Prepare

- Develop the Plan
- Align Money + Mission
- Define Tactics
- Form the Team

## Three:

### Craft Strategy

- Identify Stakeholders
- Gather Data
- Donor Segmentation
- Case for Support

# Ensure Readiness: High Performance

Organizations that commit to pursuing high performance generally make the most progress by cultivating seven core disciplines:

**Pillar 1:** Courageous, adaptive executive and board leadership

**Pillar 2:** Disciplined, people-focused management

**Pillar 3:** Well-designed and well implemented programs and strategies

**Pillar 4:** Financial health and sustainability

**Pillar 5:** A culture that values learning

**Pillar 6:** Internal monitoring for continuous improvement

**Pillar 7:** External evaluation for mission effectiveness



# Ensure Readiness: Systems

- ✓ Culture of Philanthropy at organization and within the Board of Directors
- ✓ 100% Board participation (at any level)
- ✓ Clear roles and responsibilities for Board and Staff
- ✓ Active Development Committee
- ✓ Registered to fundraise in state where located
- ✓ Adherence to Association of Fundraising Professionals' Code of Ethics
- ✓ Record-keeping software
- ✓ Gift management and reporting
- ✓ Gift acceptance & recognition procedure
- ✓ Prompt acknowledgment & thank you letters to donors
- ✓ Provide appropriate tax receipts to donors
- ✓ Grants management system —copies of every proposal, all grants communication, database information, reporting requirements, evaluation & calendar

# Stage Two: Plan + Prepare

## Develop the Plan

Nonprofits understand that funding programs and general operating expenses are not enough to survive and thrive. All activities that bring money in the door (individual donors, foundation grants, earned income, government contracts, loans, etc.) are integrated and part of a larger financing plan that supports short- and long-term goals, as well as the programs and infrastructure of the organization.

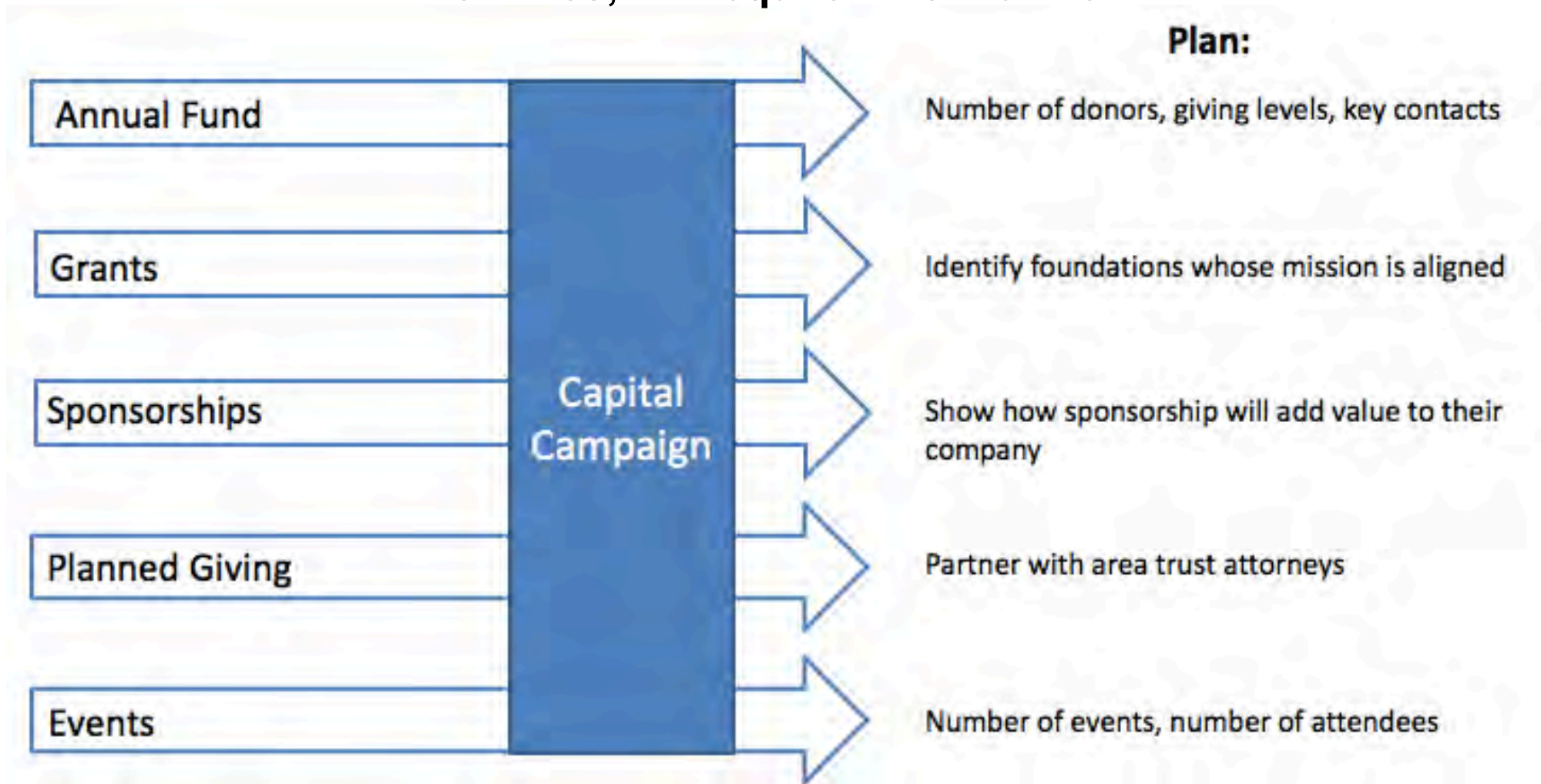
## Align Money & Mission

Nonprofits no longer segregate fundraising from their other activities (programming, administration). All elements of a nonprofit's operations, including the moneymaking ones, are fully integrated and moving forward together.

## Define Tactics

Critical to have a clear picture of where you are going and how to get there. Sets the direction and identifies opportunities to pursue. Defines specific and measurable goals and actions to measure progress against.

## Comprehensive Fundraising Involves Both Continuous & Episodic Activities; All Require A Formal Plan



## Top Tips!

# Choosing the Right Strategy

1. Does this strategy fit with the mission of our organization?
2. Does this strategy represent a stable source of income?
3. Does this strategy build our organization, our staff, our board, our pool of volunteers?
4. Does this strategy grow our core operating budget?
5. Is this strategy cost effective? Does it bring in at least twice what it costs?
6. Can this strategy be integrated into program activities that are already planned?
7. Has this strategy worked well for us, or for groups like ours, in the past?
8. Does this strategy take advantage of our organization's unique fundraising assets?
9. Will our target constituencies respond well to this strategy?
10. In terms of timing, does this strategy fit well with other activities we have planned?
11. Do we have the skills and/or expertise we need to carry out this strategy?
12. Do we have the resources (money, people) to carry it out?
13. Are there other benefits accruing from this strategy besides money (media exposure, good will, etc.)?

# Stage Three: Identify Stakeholders

1. Who have the most influence on your organization?
2. Who will be most affected by your organization?
3. Who controls the resources?
4. Who has a financial stake/interest?
5. Who has an emotional interest?
6. Who are the biggest supporters?
7. Who are the biggest non-supporters or naysayers?

# Stakeholder Map: Who Needs What?



# Stage Three: Gather Data

## Development Stats

		2018	2017	2016
Dollars				
	Total Raised			
	Total Raised from Major Donors			
Donors				
	# Total Donors			
	# Major Donors			
	# New Donors			
	# Renewed Donors			
Gifts				
	# Total Gifts			
	# Upgraded Gifts			
	# Major Donor Gifts			

## Top Tips!

### Stage Three: Donor Segmentation

- Assign meaningful donor segments
- Evaluate donors by capacity, values, and involvement
- Compile a LYBNT Donor List
- Compile a historic Board and Trustees (Advisors) List





# Annual Fundraising Worksheet

# Questions?

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# Your Opinion Matters

Please open the **NSPS app**  
and complete the **session survey** found in the  
**menu bar** for a chance to win a **free drink ticket!**

*Thank you for attending this session*