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Wondering how to invest your time for the greatest return in this challenging economy?

Build a Donor Cultivation Program that Really Works!

Erik Daubert MBA, ACFRE

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# Housekeeping



- Attendees are encouraged to interact and ask questions
  - ‘Chat’ directly to presenter or ask the whole group
- Be aware of your background noise and hold music
- Presentation materials will be emailed to all attendees

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- Next NAYDO web seminar November 4<sup>th</sup>:

Lance Armstrong Foundation’s use of Social Media to Broaden  
Reach and Engage Supporters

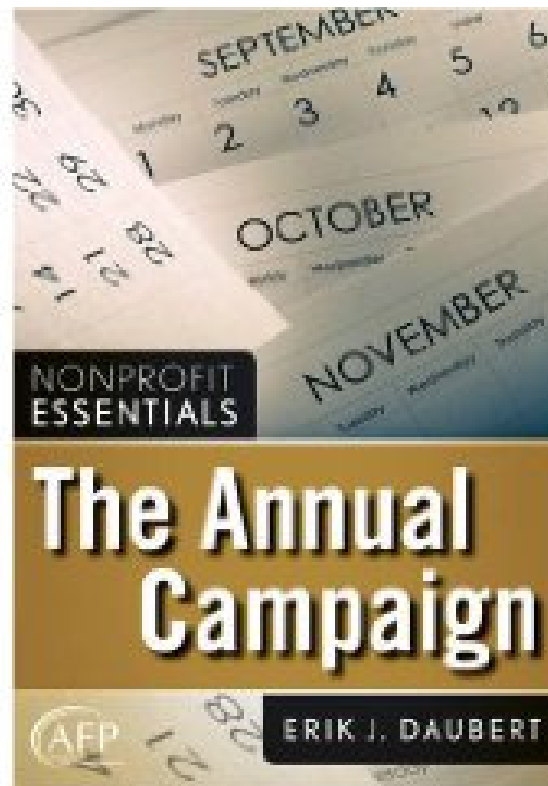
- 2010 Conference: Members only registration deadline is October 30<sup>th</sup>

“Building a Donor Cultivation Program  
at **YOUR** YMCA”

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# Erik J. Daubert MBA, ACFRE

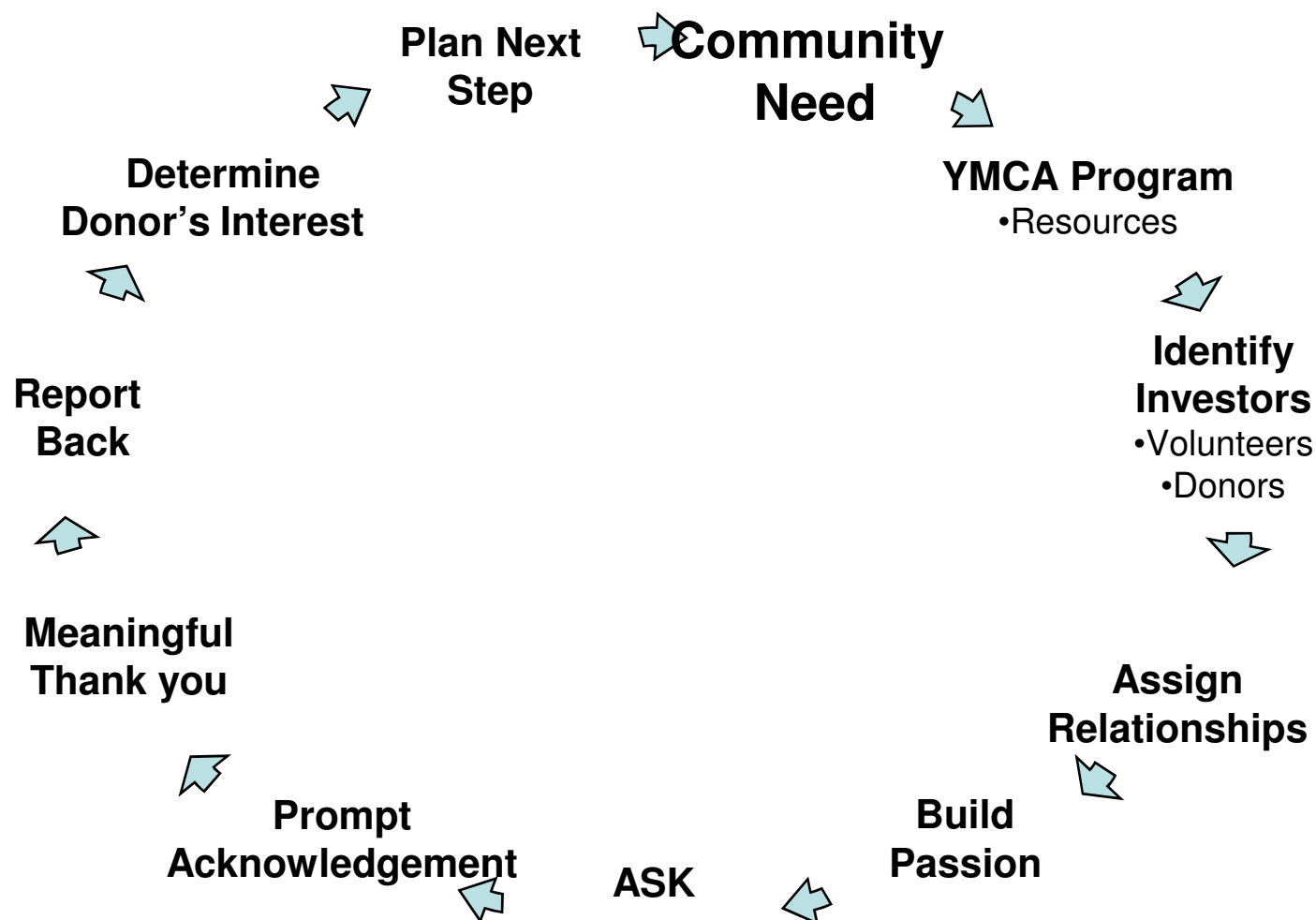
## Nonprofit Management Specialist



# National YMCA Basic Principles

- YMCA fundraising campaigns should be based upon relationship-building and are (as much as possible) face-to-face campaigns.
- YMCA fundraising campaigns must tie into the YMCA's membership involvement plans and strategies.
- The YMCA needs to move toward having a year-round campaign program that includes personal contacts, communication, and relationship-building.

# Donor Centered Cycle of Giving



# Americans (North!) Are Generous

- Close to 90% of all North American households made a gift
  - 89% in US and 84% in Canada
- US Donors Contributed 2.1% of Household Income while Canadian contributions per household continue to rise



# Where Donors Give Their Gifts

Organizations :

- That meet important needs
- They respect & have confidence in
- They trust will be good stewards of funds

# Why People Give

- They're Involved
- Preserve Values
- Repay Debt
- Guilt
- Peer Recognition
- Join Others
- Improve Community
- Concern for Others
- Habit
- Tax Benefits
- Respect for the person asking
- Someone ASKED

Someone in your past  
lied to you...

...fundraising is NOT about \$\$\$.

Fundraising is about connecting  
people to their passion through your  
organization...

# What do you need to raise money FOR at YOUR YMCA?

- Operations?
- Capital Project?
- Sustaining work (financial assistance, community outreach, etc.)
- Endowment?
- Programs?
- Other?

# Advancing **YOUR** YMCA...

What's **YOUR** YMCA story?

Why should I (or anyone  
else) give money to **YOUR**  
YMCA?

- What is **YOUR** YMCA story - why should someone give to YOUR YMCA.
  - What is the case?
  - What is the story?
  - What does this have to do with YOUR donor/prospect?
  - Where does the money go?
  - How will YOUR YMCA use this money if it is contributed?

# What are YOU doing to grow and BUILD RELATIONSHIPS through...

- Annual Campaign
- Capital Campaign
- Endowment Development
- Targeted Donor-Centered Major Gifts
- YOUR Case for Support
- YOUR Leadership Choices
- YOUR Donors and Prospects
- YOUR Team of staff AND volunteers

Each effort should have relationship building (donor cultivation!?) as a core part of your strategy

- Annual Campaign
- Capital Campaign
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# Your goal should be to...

- ENGAGE with the donor 😊
- Determine what interests THEM!
- Find out how they think and act and WHY?
- Find out what they love most about YOU?
- It's not about SELLING...It's about CONNECTING with donors and prospects!

Who are your major  
donors/prospects?

# RIGHT NOW!!!

List Your #1 - Top Prospect for whatever your biggest campaign effort is...

- Annual
- Capital
- Endowment
- Special Campaign/Gift
- Other?

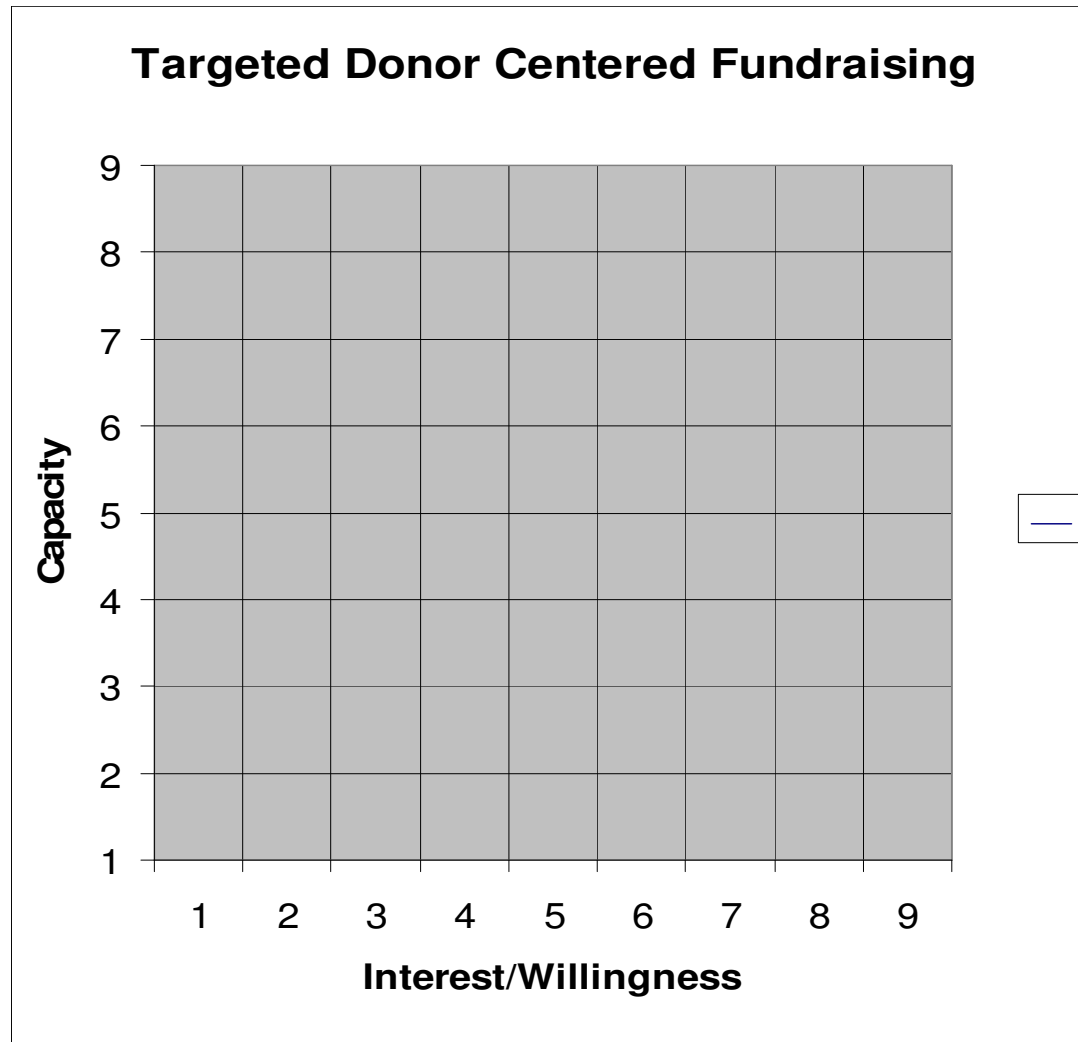
# When is their birthday?

- Date
- Month
- Year

When we meet and interact with individuals, we want to ADVANCE our cause and their relationship with the YMCA...

- Two Simple Strategies:
  - Best Friend Concept
  - Where Interest and Capacity Meet

# Where Interest and Capacity Meet...



What are you doing to GROW  
donor/prospects at YOUR  
YMCA?

## Strategies

Involvement

*Involvement*

Awareness and Education

*Conversion*

Relationship Building

## Steps

Tour

Enrollment

Participation

Getting Connected

Joins Small Community

Makes Friends

Volunteers

Contributes

Leads

*Casual*

*Connected*

*Committed*

## Experience

Service  
and  
Quality

Satisfaction  
and  
Success

Ownership  
and  
Loyalty



# Cultivating a Major Ask is Critical...

- Often times, major gifts are 90% - even 95% - cultivation and only 5% or 10% asking
- Make and take time with key people when they come to the your facility or camp
- Visit with key donors/prospects when you can between events and asking
- “Work the room”

# But You Cannot Cultivate Everyone the Same Way...

- Who has the most potential?
- Who can yield the greatest results for your organization?
- How can you make it PERSONAL?
- Where should I look for these prospects?
  - Membership
  - Leadership
  - Donors
  - Community
  - Other?

# Then Build a Plan!

- Who should I connect with?
- Who do I connect with “naturally”?
- Who on my staff can be a strong connector with donors and prospects?
- Who of my volunteers can be a connector with donors and prospects?
- What committees might be involved?
- How can we divide the work/play?

# Intentional Major Gifts Plan

- Starts with a Good Master Plan
- Always looking for major donors
- Operates year-round
- Low key but continuing basis
- Minimum CEO, Executive Director, plus Board Chair and select other Board members are directly involved

# Develop a Personalized Plan for Your Top Prospects

- Who is the best person to EVENTUALLY solicit this donor/prospect?
- Is this prospect ready? Do you need or have more time to cultivate their interest?
- How much time/money could they give if properly motivated? What would motivate them?
- Is there something in our case that might be especially appealing to them?
- Who is the best team to work the prospect? Staff/Volunteer? Both?!

# What phase is the prospect in?

- Attention – They know who we are and we know something about them –  
Ranking = C
- Interest – They are interested in us and we are interested in them  
Ranking = B
- Desire – We share our goals and aspirations for the YMCA and they are in tune  
Ranking = A – READY TO ASK?!

# Our Goals in Donor Cultivation...

- Get to know them
- They get to know us
- Find our similarities
- Match our common interests
- Share our common values
- Personal contact
- Reasonable time
- Recurring and regular contact – with purpose

# Make it a Process...

- Track It
- Measure It
- Account for it
- Part of job description
- Expect it
- Reward it
- Hire it



# DONOR AND PROSPECT CULTIVATION TRACKING FORM

[illegible]

And at some point,  
you have to ASK for  
the gift!

# Some of the many endless ways to cultivate prospects and donors...

- Invitation to important events
- Invitations to non-fundraising activities
- Lunch, dinner, breakfast, coffee, food!
- “Insiders” group opinion session
- Talk about and feature them!
- Honor and recognize them – in LITTLE Ways!
- Thank, handwritten, engage, celebrate

# Remember the Six “R’s” of Asking

Adapted from AFP’s “Asking for Major Gifts”

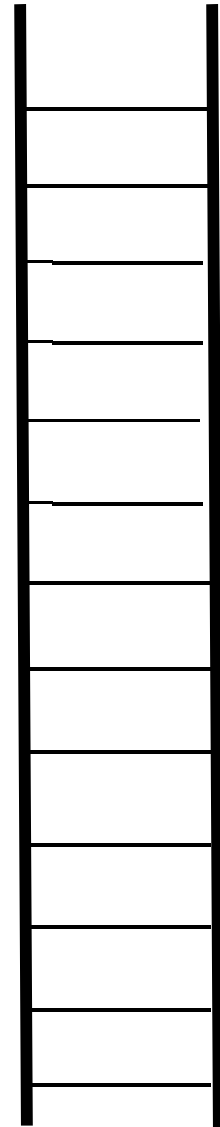
- The **R**ight Person
- Asking the **R**ight Person
- In the **R**ight Way
- At the **R**ight Time
- For the **R**ight Amount
- For the **R**ight Project

# Ladder of Effective Asking

(Adapted from Indiana University The Fund Raising School)

- Personal: Faces to Face
- Personal: Face to Face
- Personal Letter **WITH** Phone Follow
- Personal Letter **NO** Phone Follow
- Personal Phone Call **WITH** Letter Follow
- Personal Phone Call **NO** Letter Follow
- Personalized Letter
- Phone Solicitation/Phonathon
- Impersonal Letter/Direct Mail
- Impersonal Phone/Telemarketing
- Fundraising Benefit/Special Event
- Door to Door
- Media/Advertising

**Most**



**Least**

# A few things we have learned from working with other YMCAs...

- In effective YMCAs, the CEO and/or CVO is a key facilitator of new ideas
- We should take calculated risks that have impact and a high probability of generating high returns
- Coming up with new ideas is easy – implementing them is hard

# Other pearls of wisdom...

- If you focus on development – it actually works!
- If you don't cut corners, you can make incredible things happen.
- It's called development – not “Polaroid”
- When people do best practices – good things happen long term.

So how are YOU going to  
“move the needle” at YOUR  
YMCA through an organized  
donor cultivation program?



# Questions and Answers



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