

National
Family Justice Center
Alliance

Growing a Community of Support

San Diego, California

September 20-21, 2012

LRay

Schedule

- Thursday, September 20, 2012
 - What is “sustainability”?
 - What is a “community of support”?
 - Annual Resource Development Plan
 - Sustainability Self-Assessment
 - Lunch break
 - Resource Development Cycle
 - Counting our blessings
 - Memorable experience
 - Signature story
 - Homework

- Friday, September 21, 2012
 - Homework review and coaching
 - Steady growth through communication and cultivation
 - Lunch break
 - Asking
 - Stewardship
 - Structure for sustainable growth
 - Where do we start?
 - Wrap-up

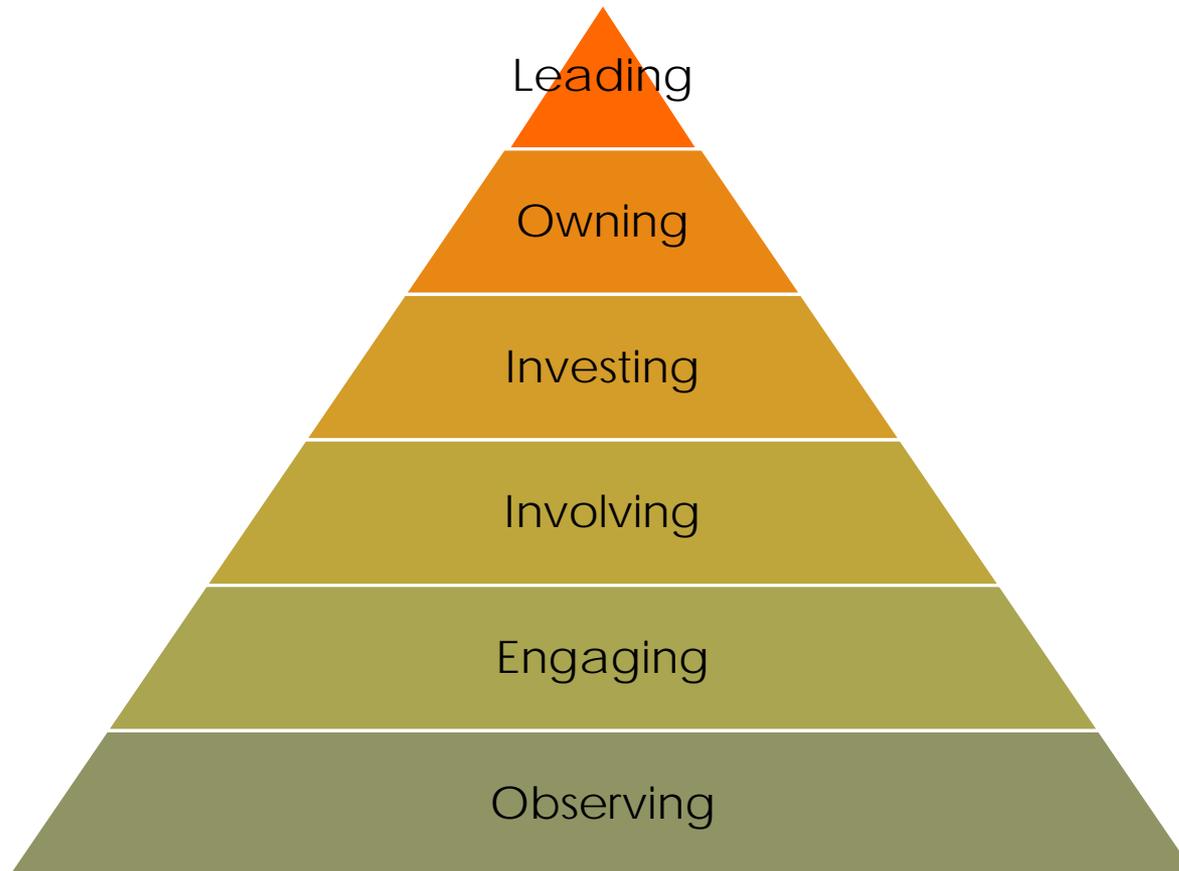
Sustainability –

Maximize assets . . .

Multiply impact

- Inspiring, strategic, inclusive, accountable **leadership** and governance
- Rigorous **system** for resource development
- Demonstrated **impact**

Community of Support



Community of Support

- Level 1: **Observing** – Inspire initial and repeat contact with you
- Level 2: **Engaging** – Secure permission to provide direct, proactive communications by offering value
- Level 3: **Involving** – Earn enough trust to secure involvement with your work

Community of Support

- Level 4: Investing – Deepen commitment to your mission and work
- Level 5: Owning – Instill and develop a sense of responsibility for your mission
- Level 6: Leading – Develop leadership skills and opportunities

Annual Resource Development Plan (pages 1-4)

- **Revenue sources summary – 2009-2013**
 - Government
 - Individuals – direct mail
 - Individuals – electronic giving
 - Individuals – 1:1 asks
 - Corporations
 - Foundations
 - Federated campaigns, e.g. United Way
 - Special events
 - Earned income
- **Action plan for each revenue source**

Annual Plan continued

- Total revenue – percentage per source – 2009-2013 [pie charts]
- Strategic fundraising goals with measurable targets, schedules and action plans [examples]
 - New donors
 - Average gift size
 - Board giving
 - Acknowledgements
 - Volunteers

Annual Plan continued

- **Annual fundraising calendar by month**

[examples]

- Grants
- Events
- Individual donors
- Major gifts
- Communications
- Memorable experiences and follow up
- Volunteers

Sustainability Self-Assessment

(page 5)

- Leadership
- System for resource development
- Demonstrated impacts

Resource Development Cycle



Asset Inventory for Center (page 6)

Asset – resources to maximize	Strategies to multiply impact
People – skills, expertise, networks	Individual Asset Inventories
Clients	Comments on website
Partners	Engage government partners
Facilities / equipment	Memorable experience
Programs / services	Social media
Board of Directors	Train on role in resource development
Education / outreach	Train speakers
Volunteer program	Include survivors + families

Asset Inventory for Individual

(page 7)

Asset – resources to maximize	Strategies to multiply impact
Like-minded friends	Invite to ME
Public speaking expertise	Become Ambassador
Copy editing skills	Edit bi-monthly newsletter
Yoga classmates	Invite to ME and place palm cards in locker room
Church group	Speak and place palm cards in restrooms
Book club	Ask to host MEs in their homes
My home	Turn summer “porch party” into ME

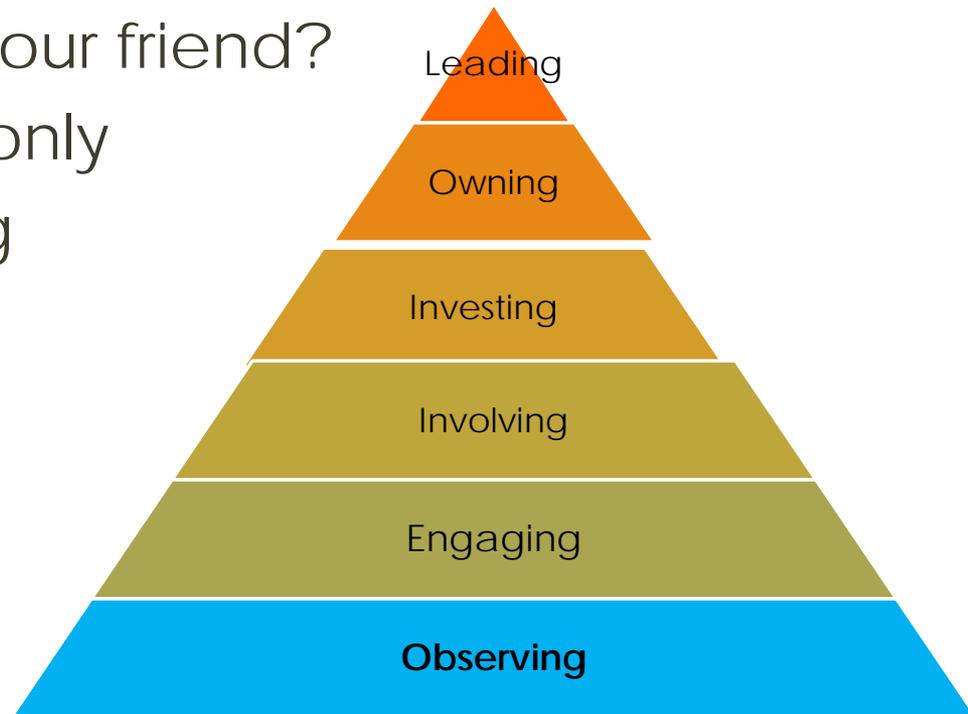
Identify prospects for your community of support

Who **really cares** about what you're doing?

Who are your **obvious** friends?

Who **should** be your friend?

Who would you only **dream** of having as a friend?



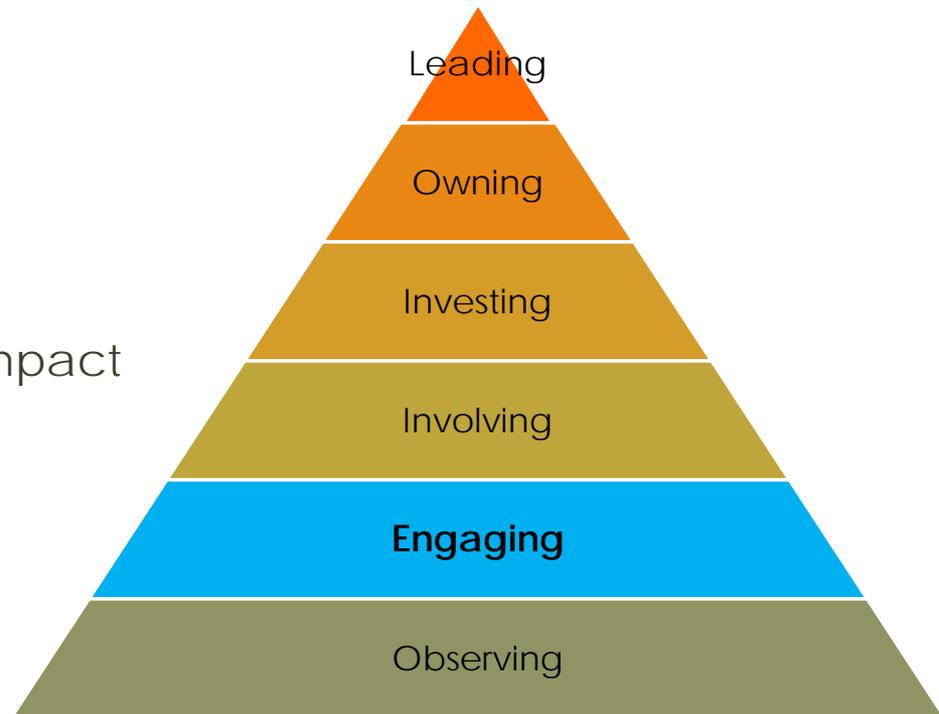
Memorable experience (page 8)

One-shot opportunity to bring the abstract to life and engage potential supporters

Key elements

[on-site, off-site, virtual]

- 1) Clear mission
- 2) Compelling stories
- 3) Numbers that show impact
- 4) Specific needs
- 5) Call to action



Tour of your mission

- Greeting
- Sign-in
- Mix and mingle
- Welcome
- Who we are
 - Mission
 - Services
 - Numbers that show impact
 - Signature story
 - Need
- Voice of the center
 - 3 stops – at each:
 - Story/testimonial
 - Facts/stats
 - Need/gap
- Closing
 - Thank you
 - Call to action (not \$)
- Follow-up

Compelling stories

- They are **simple**.
- They include element of **unexpectedness**.
- They are **concrete**.
- They are **credible**.
- They are **emotional**.

Signature story (page 9)

- What was her life like **before** she met you and your center?
- What **happened** for her when your center got involved with her and her family?
- What is life like for her **now**?

Homework from Implementation Toolkit

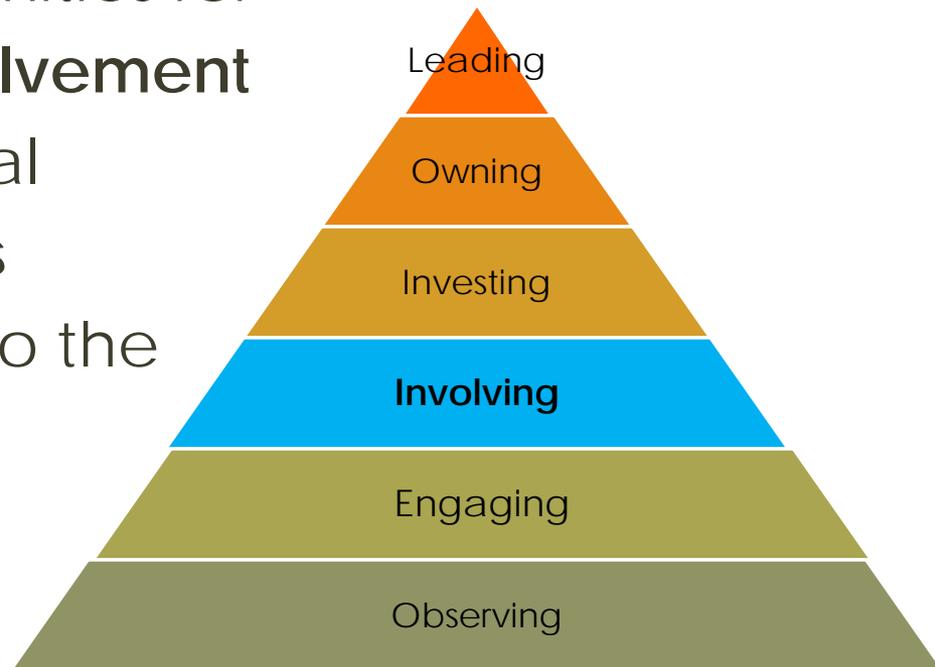
- Finish **Memorable Experience Worksheet** (page 8)
- Practice sharing **Signature Story** (page 9)
- Customize **Annual Resource Development Plan** template (pages 1-4)

Today

- Homework review and coaching
- Communication and cultivation
- Asking
- Stewardship
- Building a structure for sustainable growth
- You've planted the seeds. Now what?

Steady growth through communication / cultivation

- Leverage the memorable experience
- Identify opportunities for **meaningful involvement**
- Create individual **cultivation plans**
- Communicate to the edge of **excess**



Four-step process (page 10)

STEP	ACTION	DETAILS
1	Make follow up call to everyone who attended ME. Record info and create next actions	
2	Qualify prospect for major gift	
3	Rank prospects	
4	Create customized cultivation plan	

Leverage memorable experience

- **Follow-up** contact with **every** guest within three days
- **Record information** in database, including next action steps

Meaningful involvement

- Volunteering
- Advising
- Advocating
- Partnering
- Recruiting others
- Communicating
- Electronic engagement

Qualify prospects

- Ability
- Belief
- Contact

Prospect Ranking (page 11)

- Relationship to you
- Your comfort level soliciting this prospect
- Relationship to Center
- Giving history
- Giving capacity
- Readiness to give

Customized cultivation plan

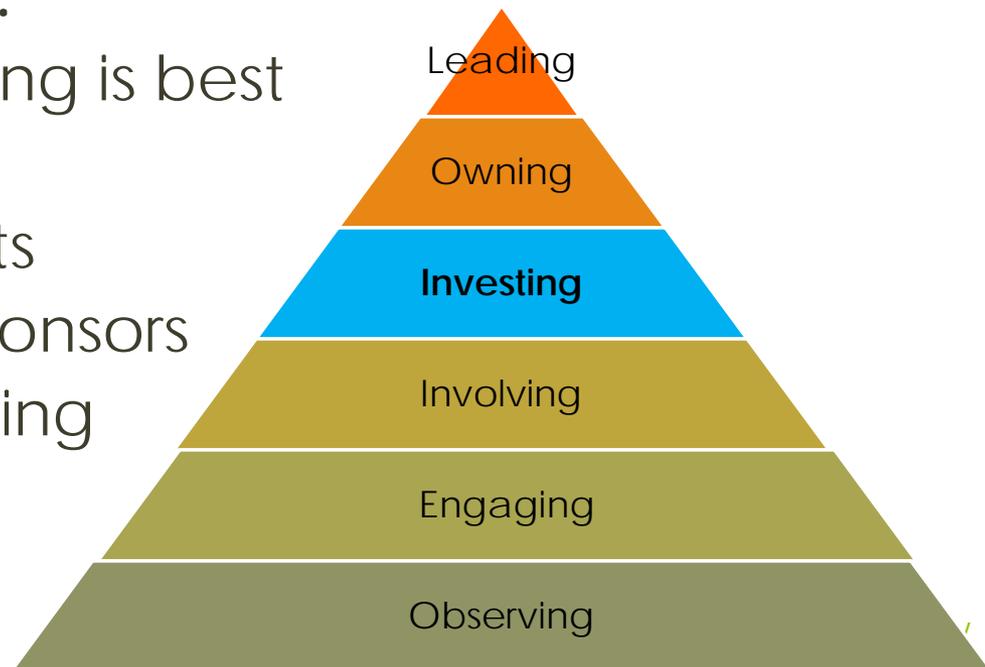
(page 12)

- Best contacts are –
 - **Personal 1:1**
 - **Relevant** to the donor
 - In accordance with **donor's timing**
 - In donor's **preferred method**
- **Know** your donors
- **Go deeper** with existing donors
- **Communicate** to the edge of excess

Asking (for anything)

People give when you make a compelling case that shows the impact of your work in the community.

- In person asking is best
- Major gifts
- Special events
- Corporate sponsors
- Electronic giving
- Direct mail



Asking

- **Individual gifts**
 - Multiple-year giving
 - Monthly giving
 - Giving circles
 - Electronic giving
 - Direct mail
- **Special events**
 - Provide audience with experience that educates or entertains, i.e. the experience they were expecting
 - Connect that experience with your mission
 - Capture contact information

Signs of donor readiness to be asked for major gift (page 13)

- **Invite others** to attend events
- **Return your calls** and emails
- **Ask questions**
- **Share** ideas and advice
- **Volunteer**, offer their time, show up and help out
- Start talking about **“we”**
- **Tell others** about you

Four-step process for major gift ask (page 14)

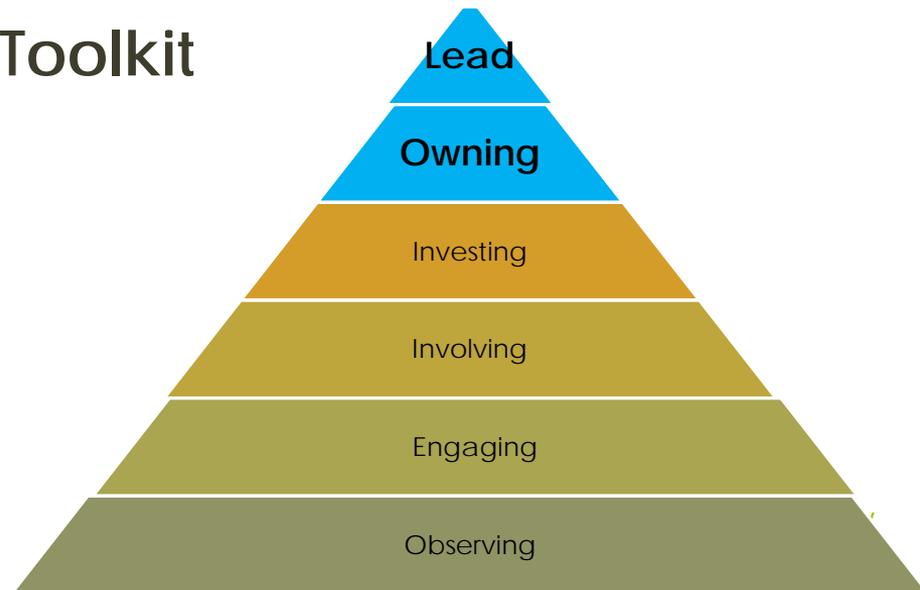
STEP	ACTION
1	Warm-up prospect. Ask for the meeting.
2	Create the script and flow with team. Rehearse.
3	The ask meeting <ul style="list-style-type: none">✓ Warm up✓ Presentation of compelling case✓ ASK for specific amount for specific purpose✓ Donor's response✓ Set follow-up steps
4	THANK!!!

Stewardship

- **Communicate** to the edge of excess
- Turn your donors into your **cheerleaders**
- **Expand** your community of support
- Cultivate the **next gift**

Building a structure for sustainability

- Roles for **Board Members** in resource development
- Launch **Resource Development Team**
- **Implementation Toolkit**



A fundraising Board is:

Actively, intentionally and formally engaged in the process of persuading others in the community to invest time, money and other resources

(page 20)

Roles for Board Members

(page 19)

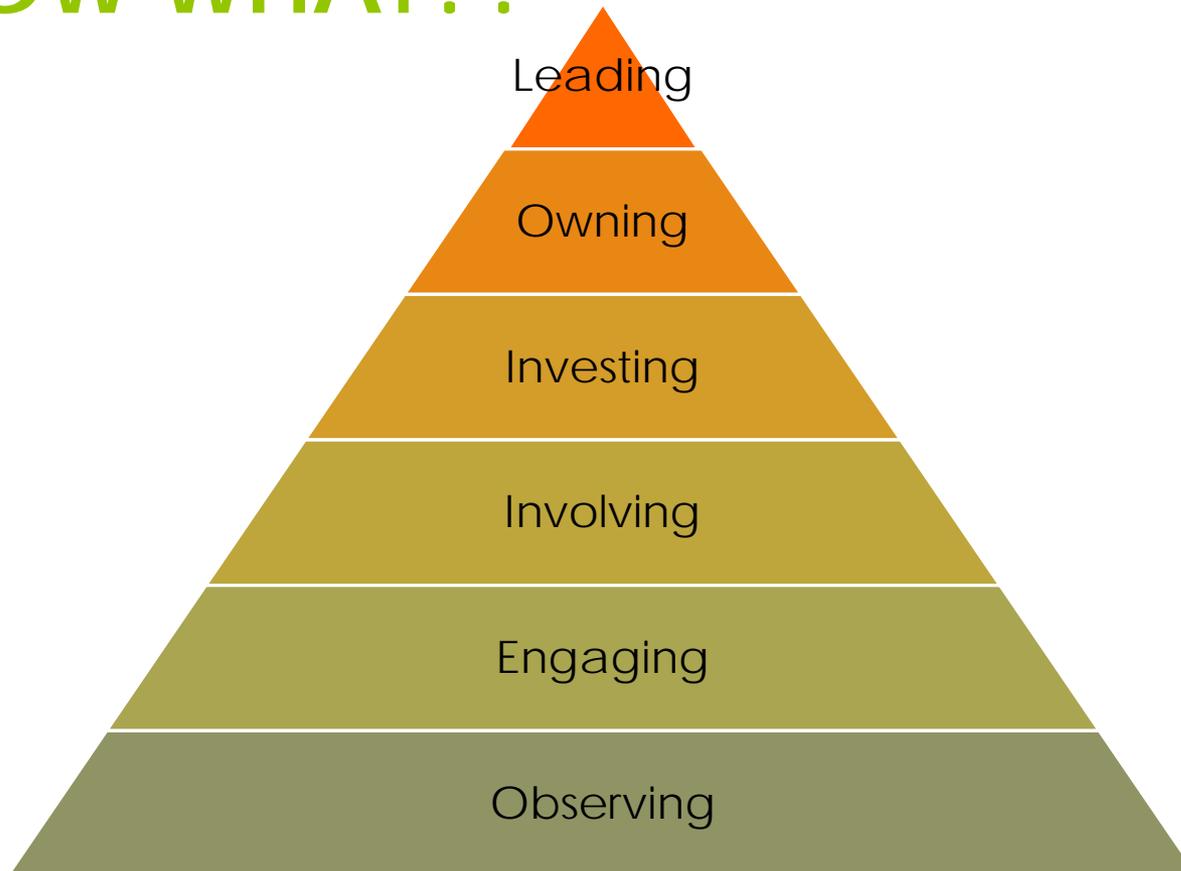
- **Attend** special events and memorable experiences
- **Invite** people from their networks to memorable experiences and events
- **Advocate** for mission and case for support
- **Thank** donors for gifts
- **Give** money themselves

Resource Development Team

(pages 15-18)

- Team
 - 7-10 members
 - Team leader
 - Regular meetings
- Annual Resource Development Plan
- Donor management tracking system
- Dashboard / benchmarks

You've planted the seeds! NOW WHAT??





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