



Essential Fundraising Plan



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September 2022: Impact Reports/ing

- Sweet & Happy New Year to All
- Refresh the Fundamentals
- How'd It Go? Pre-Holidays Phase
- Next Phase: Post-Holidays >>> Giving Tuesday
- Impact Reports/Reporting Options
- Reminder: JCamp 180 Conference



Essential Fundraising Plan



TODAY

Cultivate gifts that go to work right away, through campaigns that encourage sustained ongoing support and build donor loyalty.

ANNUAL FUNDRAISING



TOMORROW

Activate campaigns that accomplish big and lasting projects and inspire larger gifts and grow the total number of donors.

CAPITAL CAMPAIGNS

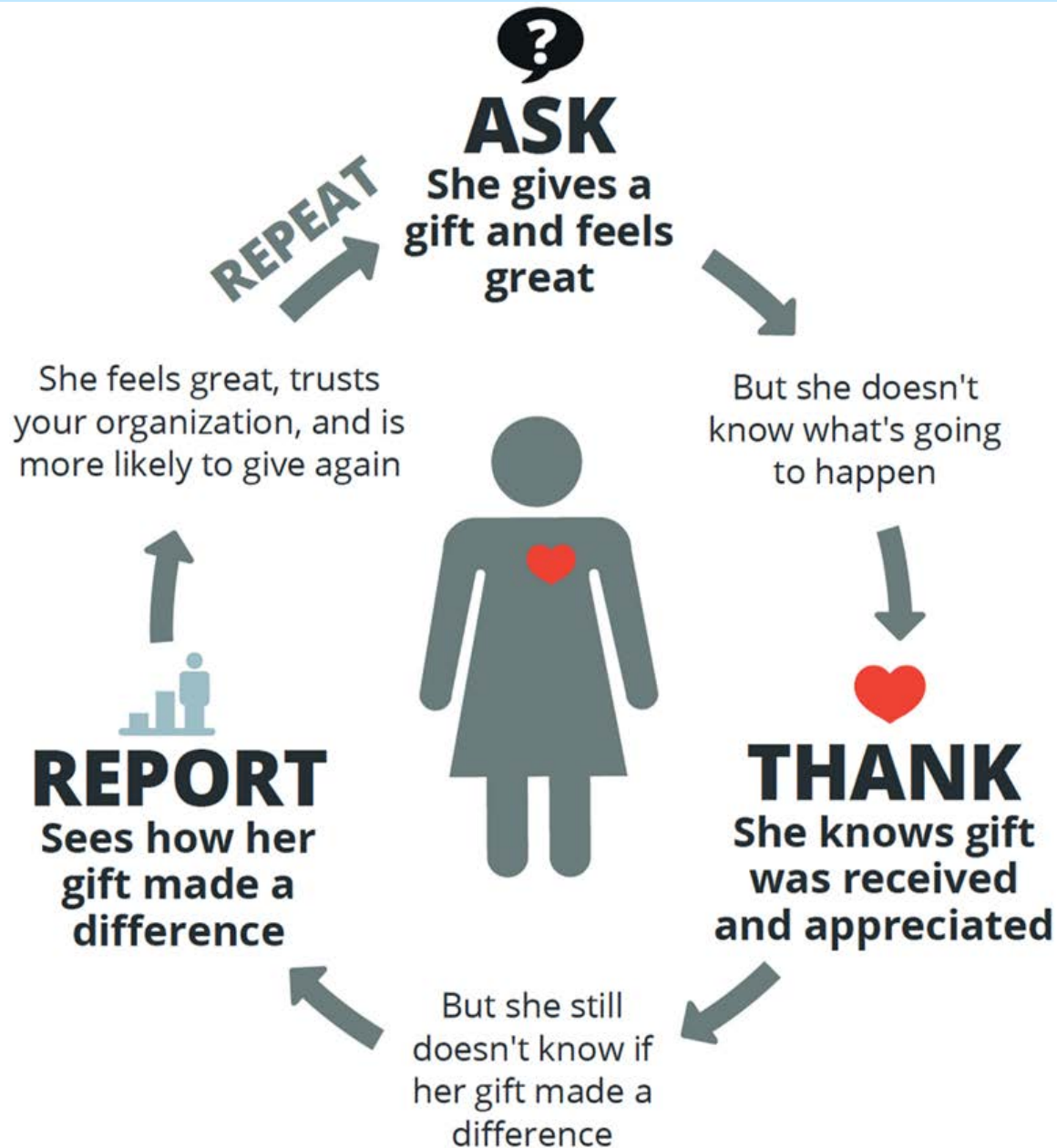


FOREVER

Grow an endowment in a campaign for outright gifts and pledged after-life gifts to ensure the organization is enduring.

LEGACY FUNDRAISING

Ask, Thank, Report, Repeat





Creating A Culture Of Philanthropy...

...For the love of others

Phase 1: Now Until High Holidays

Sample Ideas

	Ask	Thank	Report
Major Donors	<ul style="list-style-type: none"> • Make vol assignments for Fall asks • ID Giving Tues match pool donors • 	<ul style="list-style-type: none"> • Campers Deliver Apples & Honey • Update Stewardship Matrix 	<ul style="list-style-type: none"> • Directors Call w/Post-Camp Report • Fall tours at camp for donors • Donor weekend (prospects, current donors)
Mid-Tier Donors	<ul style="list-style-type: none"> • Draft Fall direct mail appeals 	<ul style="list-style-type: none"> • Select data/run lists for Rosh Hashanah card • Design/print/send card • Update Fall Ack Letters 	<ul style="list-style-type: none"> • Send Summer Hi-lights Video/Email
Sustaining Donors	<ul style="list-style-type: none"> • Draft Fall email appeals • Update monthly giving ask online • Test online giving process • Clean up database (i.e., flags - parents, grandparents, alumni, etc.) 	<ul style="list-style-type: none"> • Update Fall Ack letters 	<ul style="list-style-type: none"> • Send Summer Hi-lights Email
Legacy	<ul style="list-style-type: none"> • Send request for '21/'22 members to substantiate Legacy commitment 	<ul style="list-style-type: none"> • Send Campers "Apples & Honey" video • Design/print/send RH card • Run member birthday cards Oct-Dec 	<ul style="list-style-type: none"> • Send Pics of Legacy Tree at Camp

Phase 2: Post-Holidays Through Giving Tuesday

Sample Ideas

	Ask	Thank	Report
Major Donors	<ul style="list-style-type: none"> • Solicit donors for Giving Tuesday match pool • Nudge vols to make assigned calls 	<ul style="list-style-type: none"> • Exec/Chair TY calls to GT matching donors • Prep Hanukkah gifts • Add camp sticker with thank you notes 	<ul style="list-style-type: none"> • Call with Giving Tuesday results • Share GT testimonials via email
Mid-Tier Donors	<ul style="list-style-type: none"> • Draft GT emails • Draft Thanksgiving Message • Draft year-end email series 	<ul style="list-style-type: none"> • Vols make Thanksgiving Calls • Recruit vol callers/soc media posters for GT • draft Hanukkah cards • Add camp sticker with thank you notes 	<ul style="list-style-type: none"> • Share Giving Tuesday results
Sustaining Donors	<ul style="list-style-type: none"> • Draft social media post re monthly giving • Draft year-end email series 	<ul style="list-style-type: none"> • Send Giving Thanks for You e-mail • Recruit vol callers/soc media posters for GT • Draft Hanukkah email • Add camp sticker with thank you notes 	<ul style="list-style-type: none"> • Share GT results
Legacy	<ul style="list-style-type: none"> • Follow up gift substantiation letter 	<ul style="list-style-type: none"> • Legacy team make Thanksgiving calls • Prep Hanukkah cards 	<ul style="list-style-type: none"> •

Phase 3: Year-End Push

Sample Ideas

	Ask	Thank	Report
Major Donors	<ul style="list-style-type: none"> Nudge vols to close/handoff undone assignments 	<ul style="list-style-type: none"> Deliver Camp bubbly/bubbles for HNY 	
Mid-Tier Donors	<ul style="list-style-type: none"> Send year-end email series - Xmas to NYE 	<ul style="list-style-type: none"> Send Hanukkah cards Send bubbly HNY email 	<ul style="list-style-type: none"> Email New Year Summer '23 Look Ahead
Sustaining Donors	<ul style="list-style-type: none"> Send year-end email series XMas to NYE 	<ul style="list-style-type: none"> Send Hanukkah email Send bubbly HNY email 	<ul style="list-style-type: none"> Email New Year Summer '23 Look Ahead
Legacy	<ul style="list-style-type: none"> 	<ul style="list-style-type: none"> Send Hanukkah card 	<ul style="list-style-type: none"> Email New Year Summer '23 Look Ahead



2021 Impact Report

THE Major Gifts REPORT

MONTHLY IDEAS TO UNLOCK YOUR MAJOR GIFTS POTENTIAL

Some of What's Inside...

Communicate your campaign's success p. 2
 Establish a stewardship plan p. 3
 Manage real estate gift risks p. 4
 Up your major gifts program p. 5
 Implement a comprehensive campaign p. 6
 Reconnect with lapsed donors p. 7
 Become a more mindful listener p. 8

Give Advisory Boards the Time, Attention They Deserve

In some respects, your advisory board

KEY STRATEGIES WORTH IMPLEMENTING

Work to Inspire Mega Giving

For the first time last year, charitable giving exceeded \$400 billion in the United States, with gifts from individual donors comprising 84 percent of the total.

"A great deal of new wealth has been created in the last several years, much of it driven by increases in the stock market, and the result for charitable organizations has been a marked increase in mega giving," says Elizabeth Ziegler, president and CEO of Graham Pelton, a consultancy in New York, NY.

Another positive aspect for charitable institutions, according to Ziegler, involves the fact that cultivating and soliciting mega gifts is as much as 20 times lower than the cost of raising smaller gifts through traditional means, such as direct mail, special events and campaigns.

"Just a few years ago, the threshold for mega giving to charitable





Is Your Impact Report Doing Its Job?

Examine readership data.

Demonstrate impact.

**Consider quarterly
updates.**

Cut the fat.

Tell a complete story.

Consult a third party.

*Source: Lynne Wester, Founder and Principal, Donor
Relations Guru Group, Austin, TX.*

Options: Fit Your Org & Audience

- Postcard
- Poster
- PDF
- Infographic
- Traditional “Annual Report”
- Online microsite
- Video
- Conference call/Webinar



Creating life-long Jewish connections
one happy camper at a time



See what you made possible in 2021

Thanks to your generosity last year, Maine Coast Heritage Trust was able to conserve 29 more special places on the coast of Maine, totaling 16,646 acres. Beyond that, you helped us steward the 41,498 acres in our care—which includes building trails, removing trash from the shore, looking out for wildlife, removing invasive plants, and so much more.

Learn more about your impact at mcht.org/2021-impact.

New places conserved in 2021

These 29 places comprise 16,646 newly protected acres (nearly the size of the town of Camden!), including more than 20.85 miles of shoreline (the distance from Ellsworth to Bar Harbor!).

Lands cared for in 2021

MCHT stewardship staff monitored and cared for 41,498 acres (about the size of the city of Portland) in 2021, including maintaining over 100 miles of trail (the distance from Kittery to Damariscotta).

Partnership projects from 1970–2020

In addition to conserved land under our care, MCHT has worked with partners to conserve hundreds of places up and down the coast. Of the 29 projects completed in 2021, 14 were partnership projects.

Land trust leadership by the numbers

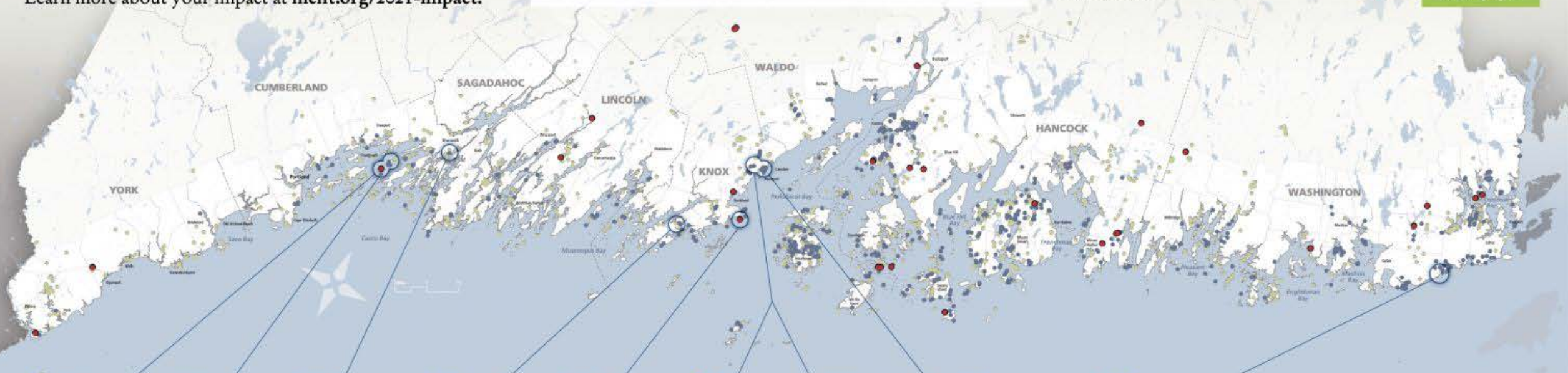
\$40 million! After co-leading a **5-year** campaign, MCHT celebrated new funding for the Land for Maine's Future program. Governor and state legislature approved, this investment builds upon a **35-year** record that has conserved more than **600,000 acres**.

75 representatives of land trusts throughout the state participated in a **3-part workshop series** entitled: "Learning to Do Better: Diversity, Equity, & Inclusion and Maine Land Trusts" coordinated by the Maine Land Trust Network, a program of MCHT.

375 participants in our first virtual Maine Land Conservation Conference gathered to discuss climate resilience, Indigenous engagement, nature-based education, and responding to increased preserve use.

Learn more about our Land Trust Program—devoted to strengthening Maine's entire land conservation community of over 80 land trusts.

mcht.org/land-trust-program



Generous landowners allowed people to visit Little Whaleboat Island for years. Now protected in perpetuity, the island will be officially open to the public.

We added **5** new MCHT preserves and expanded several existing preserves by nearly **300** acres.



A camper sets up on a tent platform at the Goslings Preserve for a magical experience camping on a Maine island.

People flocked to our island campsites! More than **250** people booked reservable campsites and hundreds of others stayed in our open camps.



2021 interns gathered at Woodward Point Preserve in Brunswick for a chainsaw training course.

10 Maine students participated in the Richard G. Rockefeller Conservation Internship Program, pairing students interested in land conservation with MCHT staff.



At Bamford Preserve in St. George, a steward removes invasive multiflora rose to make way for native plants that provide more nutrition for wildlife.

Land stewards oversaw significant invasive plant removal projects at **5** of our preserves, in addition to monitoring



Sheep Island is now the third MCHT island preserve off Owl's Head.

7 entire islands were conserved.



A bin of freshly washed carrots from Erickson Fields Preserve.

Erickson Fields Preserve staff, volunteers, and program participants grew **26,235** pounds of produce—**86%** of which was donated to hunger relief organizations.



A gardener and her pup pay a visit to their community garden plot at Erickson Fields Preserve.

Every plot in our community gardens at Babson Creek, Kelley Farm, and Erickson Fields preserves—**76** total—was filled!



Families gather at Aldermere Farm to meet the baby Belted Galloways on Calf Unwelling Day.

Over the course of the year, a total of **800** people joined us at Aldermere Farm for a series of COVID-friendly events.



Stewards add rock steps to the Bog Brook Cove Preserve Ridge Trail, which will last much longer than wooden steps.

Stewards maintained over **100** miles of trails on our preserves for the public to enjoy.

Donations by the numbers

4,410 people gave to MCHT in 2021, which is nearly **25%** more than the prior year!

1,027 people gave for the first time, which is over **50%** more than the number of first-time donors the prior year. (Welcome to MCHT!)

312 of you are Anchors, supporting this work with a monthly gift.

210 of you are part of Next Wave—the next generation of land conservationists.

824 of you are members of The President's Circle, giving **\$1,000** or more annually.



Cohen Camps

ELI & BESSIE COHEN CAMPS

YOUR

2020 Impact Report



CAMP
Pembroke

CAMP
TEL NOAR

CAMP
Tevya



Impact Texting???

Hi, [DONOR NAME]. It's [YOUR NAME] with [ORG]. As one of our most dedicated supporters, I thought you'd love to see the impact you're making at our organization. Take a look at [BRIEF DESCRIPTION OF VIDEO, ie "one of the elephants we recently released from captivity!"]: [LINK].

Hi [DONOR NAME], [YOUR NAME] here with [ORG]. I wanted to thank you for your recent donation of [AMOUNT / GIFT TYPE]. Did you know that with your gift, we're able to [SPECIFIC EXAMPLE OF IMPACT, ie "feed 20 kids school lunch this year"]? We couldn't do it without you!

Hey [DONOR NAME], it's [YOUR NAME] with [ORG]. I wanted to thank you for your generous support this year, and give you an exclusive first look at our Impact Report. With your help, we've been able to accomplish more than we ever thought possible: [LINK].



The Ultimate Impact Report/ing?

- **It demonstrates impact, period.**
- **It's donor-focused.** tell them what *their* generosity has made possible... “you” instead of “we”
- **It's beautifully designed.**
- **It tells powerful stories.** about how a donor's gift has changed someone's life
- **It oozes gratitude.** begin and end with heartfelt message of thanks. And don't thank them for their donation, thank them for their generosity. Thank them for changing lives. Thank them for their commitment to your mission.
- **It provides a clear explanation of how the funds were used.** ensure they know not only that they *have* made an impact, but *how*.
- **The donor's name is spelled correctly.** Master the basics
- **It does not contain an ask in any way, shape, or form.** Please...*no thanking!*



Let's Talk



October 23-25, 2022
Providence (RI) Marriott Downtown

Still Time to Register!!!



Essential Fundraising Plan

Next Session
October 27, 1pm EDT
Conference Reflections
+

Legacy/Endowment is Forever

Kevin Martone
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Dan Kirsch
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