

C9: Annual Campaigns, Legacy Giving, Donor Stewardship, & Donor Relations

Solicitation Training

JCamp 180 • October 2017

The Basics of the Fundraising Pitch

- If you're not sold on an idea, you can't sell it to others
- It is a privilege to be able to ask for money for a cause you care about
- A Solicitor is doing a potential Donor a favor by alerting the Donor to a philanthropic opportunity. No apology or hesitation is necessary

The Basics of the Fundraising Pitch

- One Solicitor can make a difference in changing the destiny of the organization, and, thereby, the world
- Expect to be rejected, but not to be disappointed and/or frustrated
- Solicitors solicit – Let it become a way of life

The Donor's Profile

- The best Donors to target have both desire and capacity
- Donors who have given anywhere previously are the best donors to your project. People who give, give; people who don't give, (generally) don't
- One Donor can make a difference in changing the destiny of the organization, and, thereby, the world
- Donors want to feel comfortable that their “investment” will be managed wisely, carefully and well

Annual Campaign

- What is your annual fundraising goal?
- What will raising your annual goal enable your camp to do? (Hint: your answer needs to be more than 'offer scholarships to families in need')
- What is your plan to reach your goal?
 - How many donors will give you what amounts of money to get there?

Annual Campaign

- Cultivating a culture of philanthropy – steps 1, 2, & 3:
 1. 100% Participation
 2. Be explicit – we want you to continue giving at this level every year
 3. Be clear – we need these funds in order to achieve our bold vision
- Strategic Plans are **not** just about strategy or program priorities
 - Process matters more than anything else
 - Major donors and prospective major donors need to be deeply engaged in the process
- Focus and Discipline are critical
- Securing unrestricted gifts

Legacy Campaign

- A will is powerful...include AIPAC (or camp) in yours
- Legacy Campaign is only as strong as your stewardship
- Don't forget about the Charitable IRA Rollover Rules

Legacy Campaign

- Commitment matters – what kind of commitments do you have?
- How do you ‘mainstream’ legacy giving in your camp community?
- Perpetuating annual gifts via legacy commitments
 - The ‘20x rule’

Donor Stewardship

- Retention
- Growth
- Donor / Stakeholder Engagement

Donor Stewardship

- Major Gifts Stewardship
 - What is a ‘major gift’ for your camp?
- Basic Donor Communications
- Surprise & Delight

Donor Stewardship

- Direct Mail Is a Poor Solicitation Strategy For 'Major Gifts'
- Sustainer & Multi-year Giving Strategies
- The Right Relationship is Everything

Fundraising Events

- Re-consider whether your fundraising events are actually designed to best deliver the greatest possible value for your camp & community.
- Events as Stewardship vs Events as 'Fundraising'
- Your Donors Are Your Constituents

Key Mechanics

- Confidence
- Paint a picture instead of making a statement
- Ask lots of questions to make your point
- Always be making the case
- Sense of Urgency
- Re-direct everything back to your Camp's philosophy and strategy

Key Mechanics (cont'd)

- What motivates them?
- How do you buy?
- Being lectured vs. a conversation
- Best way to handle the toughest questions – objections are a gift
- Be an ACTIVE listener - detective