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