Fundraising Basics

Rachel Heine
Director of Development
Columbus Metropolitan Library
Perceptions

• 5k
• Lemonade stand
• Ask MacKenzie Scott
• Gala
• Call wealthy people
• Silent auction
• Everybody give $5
I find people who want to invest in the library and match them with a need at the library.
Objectives

• Evaluate current fundraising activities
  • Review elements of fundraising
  • Priorities

• Identify opportunity areas
  • Biggest bank for your buck

• Make a realistic plan
Evaluate Current Activities
Review elements of fundraising

<table>
<thead>
<tr>
<th>Relationship Manager (dollars)</th>
<th>Project Manager (donors)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Leadership Annual Giving</td>
<td>Events</td>
</tr>
<tr>
<td>Major Gifts (&lt;20% of donors giving at that level, but &gt;80% of the dollars)</td>
<td>Annual Giving</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>Planned Giving (estate gifts)</td>
<td>Memberships</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Grants</td>
</tr>
<tr>
<td></td>
<td>Stewardship</td>
</tr>
</tbody>
</table>
Identify Opportunity Areas

Biggest bank for your buck

- Major Gifts
- Grants
- Year-End Direct Mail*
- Planned Giving Mail
- Stewardship*

*Leadership Annual Giving
Identify Opportunity Areas

Biggest bank for your buck

Major Gifts

• Start with current donors (5x more to acquire new)
  • Size and frequency of gifts to prioritize
  • Wealth screen
  • Evaluate specific # at time
• Look at other orgs
• Board (personal giving, networking, thanking)
  • LinkedIn party
Identify Opportunity Areas

Biggest bank for your buck

Grants

• Research
  • grants.gov
  • candid.org
  • grantwatch.com
• Look at other orgs
• Community Foundation
• Follow the instructions and answer the question
Identify Opportunity Areas

Biggest bank for your buck

Year-End Direct Mail & Email

• Allows you to renew and cultivate
• Send to your donors every year
• Send email to cardholders every year, mail every other (from library inviting them to give)
Identify Opportunity Areas

Biggest bank for your buck

Planned Giving
• Simple letter with champion or example
• Include intent form and sample language
• PG Calc, Pentera, Crescendo

“I give and bequeath to (Organization, City, State) an (Unrestricted or Restricted to) in the sum of $(Amount) or % (Percent) of my estate, real or personal, which I own at the time of my death or over which I have power of disposition.”
Identify Opportunity Areas

Biggest bank for your buck

Stewardship

• Story email to all donors
  • CauseVid, ThankView
• Handwritten notes from staff
• Calendar in December
• First Time Donors
• Focus on LAG and up
  • Ringless voicemail
  • Catapult Fundraising

“If we were meant to stay in one place, we'd have roots instead of feet.”

— Rachel Wolchin

Love My Library

columbuslibrary.org | 614-645-2275
## Identify Opportunity Areas

Biggest bank for your buck

<table>
<thead>
<tr>
<th>Type of Gift</th>
<th># of Gifts Needed</th>
<th># of Prospects</th>
<th>Ave. Gift Amount</th>
<th>Total Gifts</th>
<th>Cumulative Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Major</td>
<td>5</td>
<td>10</td>
<td>$10,000</td>
<td>$50,000</td>
<td>$50,000</td>
</tr>
<tr>
<td>Grants</td>
<td>3</td>
<td>6</td>
<td>$10,000</td>
<td>$30,000</td>
<td>$80,000</td>
</tr>
<tr>
<td>Year-End</td>
<td>250</td>
<td>1,000</td>
<td>$50</td>
<td>$12,500</td>
<td>$92,500</td>
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<tr>
<td>Planned</td>
<td>1</td>
<td>4</td>
<td>$5,000</td>
<td>$5,000</td>
<td>$97,500</td>
</tr>
<tr>
<td>Stewardship</td>
<td>5</td>
<td>25</td>
<td>$500</td>
<td>$2,500</td>
<td>$100,000</td>
</tr>
</tbody>
</table>

Do you have the prospects?
Create A Map

Short Term

<table>
<thead>
<tr>
<th>Jan</th>
<th>Feb</th>
<th>Mar</th>
<th>Apr</th>
<th>May</th>
<th>Jun</th>
<th>Jul</th>
<th>Aug</th>
<th>Sep</th>
<th>Oct</th>
<th>Nov</th>
<th>Dec</th>
</tr>
</thead>
<tbody>
<tr>
<td>Major</td>
<td>Cultivation/First Meetings</td>
<td>Asks/Closing</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Grants</td>
<td>Per Submission Dates</td>
<td>Start @ Giving Tuesday</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Year-End</td>
<td>Mailer</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Planned</td>
<td>Story Mailer</td>
<td>Gift</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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<td></td>
</tr>
</tbody>
</table>
## Create A Map

### Long Term

<table>
<thead>
<tr>
<th>Year 1</th>
<th>Year 2</th>
<th>Year 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Major</td>
<td>Cultivate/Close New</td>
<td>Closing New Gifts</td>
</tr>
<tr>
<td>Closest Donors</td>
<td>Reports/Add More</td>
<td></td>
</tr>
<tr>
<td>Grants</td>
<td>Most Obvious Fit</td>
<td>Reports/Add More</td>
</tr>
<tr>
<td>Year-End</td>
<td>Giving Tuesday</td>
<td>+ Spring</td>
</tr>
<tr>
<td>Planned</td>
<td>Mailer</td>
<td>2 Mailers</td>
</tr>
<tr>
<td>Steward</td>
<td>Story Mailer/Gift</td>
<td>Continue</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>+ FTD</td>
</tr>
</tbody>
</table>

- Long Term focus on creating and managing a map for long-term fundraising efforts.
- Year 1 involves identifying major donors and their close relationships.
- Year 2 focuses on cultivating and closing new grants, adding more reports and reminding supporters.
- Year 3 aims to close new gifts, add more reports, and remind supporters in the spring.
- ContinueMailers are planned for Year 1 and Year 3.
Objectives

• Evaluate current fundraising activities
  • Review elements of fundraising
  • Priorities

• Identify opportunity areas
  • Biggest bank for your buck

• Make a realistic plan
  • Layering elements over time
JUST ASK!
YOU GET A THANK YOU!

AND YOU GET A THANK YOU!

AND YOU GET A THANK YOU!

EVERYONE GETS A THANK YOU!