Cultural Alliance OF FAIRFIELD COUNTY

Serving the cultural organizations, artists and audiences that contribute to the creative and economic vitality of the region

EXECUTIVE DIRECTORS NETWORK

Sharing Resources: Expertise-To-Go

Wednesday December 16, 2015
Darien Library

NOTES

This session followed up on our September meeting that highlighted the expertise available for other EDs to consult in the areas of Marketing & Media Relations (Lou Ursone); Strategic Planning (Heather Montilla), Board Development (Bonnie Wattles) and Board Education (Amy Allen). This session focused on five aspects of fundraising.

Janet Lindstrom, *New Canaan Historical Society* (NCHS), spoke to her experience with **Fundraising Events** that are critical to the organization, especially as they correlate with its mission.

1. **Clarify event goals:** for NCHS these are: making new and lasting "friends"; furthering name-recognition; raising significant funds.
2. **Ensure you have firm commitment** - from your committee chair, ED and staff.
3. **Key factors for a successful event:** (reinforced by attached article) include: raising significant funds; fixing a high ticket price; pre-selling all tickets before the event; targeting a specific market (those who will continue support); ensuring the event is well-planned and well-executed. NCHS has two quite different regular events: a hallmark bi-annual Modern House Tour (of houses designed by the Harvard Five) that is very closely tied to its preservation mission; and an annual Ice-Cream Social - a community-building event that raises awareness more than money and is widely sponsored. See attached article: *Event Planning Checklist*

Heather-Marie Montilla, *Pequot Library*, spoke to the challenge of **getting smaller donors to give more.**

1. **Ensure institutional knowledge is accessible** - a key challenge, especially for new EDs - and keep a freshly updated, **good donor database** and **major-donor files.**
2. **Understand that relationships are key.** Following the recommended "Moves Management" steps of: Identification - Cultivation - Solicitation - Stewardship

requires significant commitment by individual staff members to all (prospective) donor.

3. **Ensure all donor communications align clearly with a donor's interests and have 6-7 annual points of contact.** Any increase in giving is a statement that the donor loves what you do and wants you to continue.
4. **Explore and discover the "sleepers"** in the community.
5. **Show donors that you are a responsible steward** of their money. Have clear financial statements, a compelling annual report with stories about the outcome of your funded projects.
6. **Celebrate your success and your donors.**

Michael Moran, *Palace Theatre, Stamford,* spoke on lessons learned from the Palace's success in **raising money for capital projects** (even though not so much in operating funds).

1. **First make sure you have access.** Any elected official you know personally, or that a board member knows, can help you with the process of getting funding.
2. **Have a compelling story**. People give to people - but people also give through emotion. You open two ADA-compliant bathrooms - that's news, that's a story: it shows how committed you are to public access. Support any proposal with visuals: demonstrations are effective.
3. **Check a town's specific criteria for funding** (ADA; capacity-building, economic development; health and safety) - ensure you know what's on their list. Know the history of their funding.
4. **Know what funding limits are** (Stamford for instance funds nothing under $50,000) - so align your request to their financial expectations (maybe you can bundle projects to meet those expectations).
5. **Know what the funding cycles are**.
6. **Shovel-ready projects win.** Projects with architectural drawings and engineering studies and that can start immediately, have a distinct advantage.
7. **Remember all the soft costs** (architect fees, eat).
8. **Wait.** As towns often need to bond granted funds and have to get approval, it's best to wait for the final go-ahead. If funds are not approved, ask why and try again - it may get approved in the next cycle.

Maisa Tisdale, *Freeman Houses*, spoke on the "grant*winning*" aspect of grantwriting. With a background as a credit analyst, Maisa uses the same approach for big or small grants.

1. **Have a business plan**: funders increasingly have a corporate outlook.
2. **Know where your project/organization fits into the funding landscape**. How will you stand out in a pile of applications? Get external viewpoint on what makes you unique. Develop your voice and your story.
3. **Call and find out who makes the decision**: then ask if you are a good match for the funder.
4. **Contact is key: it's people that decide**.

Jane von Trapp, *Bartlett Arboretum,* discussed the **Annual Appeal.**
Jane emphasized the importance of *who* you are appealing to. For example, most Bartlett Arboretum members are retirees and their appeal is the old-fashioned way - through direct mail. Jane has also discovered, through a background in private schools and higher-ed, that online pitches can annoy people - although if you join a wider group appeal, like Giving Day, you may have a better result. Speaking of online: the Bartlett is including a "Give" button in its new Bartlett app that, beyond asking for donations, will give some metrics on the use of the app.

1. **It's important to *ask***: "If you ask, people give! If you don't ask, they won't." With no ED for the previous 3 years, the Bartlett under Jane has tripled giving in one year - partly because she "just asked."
2. **Having a compelling story is essential**: have a succinct statement of your story with really compelling images. One Bartlett campaign was simply: ***"Why trees?"*** - with a dozen bullet points. Mention everything you do in very succinct statements, highlighting key words.
3. **Make it easy to give**: have an appeal letter with a tear-off giving form attached.
4. **Avoid jargon** (like "annual fund") - brand it, eg: ***Fund for Bartlett***.
5. **Thoroughly glean your database** ("I take 2 or 3 days to make sure everything is right. Get the names right").
6. **Personalize** it as much as you can.
7. **Envelopes are important**. To steer the message away from the trash can, Jane uses a big window envelope with a compelling image+teaser on front.
8. **Use 1st-class postage**. Get bulk-rate if over 500 pieces. Weigh them carefully. Use Postage Paid with indicia for return envelopes.
9. **Use national change-of-address and "deceased" lists.**
10. **Use a buck slip** (an insert with a special message - like "give a gift of stock," or matching gifts.
11. **Stewardship.** Thank people in a big way: have a donor-recognition event (not a fundraiser - but it turned out to be); send thank-you notes within 48-72 hours.

Questions and Comments
Return Envelopes: One ED reported no ill effect from not including return envelopes; only 6 EDs in the group still do.

Goals: One director said they were trained that if the goal was $10,000, to expect $50,000 and to double the hours of staff/volunteer. Janet replied that it really depends but that **the target audience makes a big difference:** a very specific appeal brings in more. One ED commented that it's important to have the committee chairs agree to "make up the difference" if the fundraiser fails to meet the target. Another said that it was key to meet goals first with corporate sponsorships upfront: "pay for it first, so that everything that comes in is extra."

Number of Asks a Year: Jane reiterated one should be as targeted as possible: so you send one appeal a year to everyone; then the second is a giving envelope to accompany the Annual Report; next are very targeted appeals to specific audiences (one for those over 65, another for dog-walkers, etc). Jane reported that the single big appeal yields the smallest return.

Contact. One development director commented that funders make it increasingly harder to get through to a person. Maisa replied that you have to do your homework and find out who is the right person and then to call them directly and “make the pitch!” (more like business). She quoted Robin Roberts “make your mess your message” - if you have a problem or a need make it clear how the funder can solve the problem. For those who will not fund you, use them to introduce you to those who might. Go to events, workshops and network until you find the people who can help you.

Segmenting. Jane said that for appeals you have to do your research to segment the population and discover what their interests and passions are. Wholesale asks don't provide the returns. You have to hit the heart and their interests. Janet Lindstrom reinforced this: she has “The Modern House” list, “The Antique Car” list, the “Preservation” list and she targets them specifically for different events. **Exit surveys** at events, asking “what are your interests?” help segment audiences.

Serving an audience who cannot donate to you. Maisa responded that with such an audience, make sure you get corporate sponsorship of events ahead of time: have them buy tables or blocks of seats. Then look for volunteers among the audience you serve: have them help with on-the-ground communications - flyers to church, to school; have volunteers ready to talk to people and to capture their comments. Also ask for small amounts and then leverage it with funders by pointing to the $750 you raised from $5 gifts.

Event Planning Guide
Event Checklist

The following is a generic Event Checklist that will help you get started in identifying all of the details you'll need to consider as well as an indication of the timelines involved with your event planning process.
Please note that since association and non-profit events can range from a small workshop through to a gala fundraising event, we were not able to drill down to the level of detail you'll need to consider when planning your event. But we hope this checklist gets you started with your event planning.

High Level Planning: 4-6 Months Ahead of Event *

- Establish event goals and objectives
- Select date
- Identify venue and negotiate details
- Develop Event Master Plan
- Get cost estimates *(e.g., room rental, food & beverages, equipment, speaker fees, travel, etc.)* and create a budget
- Recruit event committee, event manager or chair and establish sub-committee chairs
- Create and launch publicity plan & brand your event *(ensure staff and/or volunteers are identified to manage specific tasks – e.g., media relations, VIP coordination, printed material design & printing coordination, signage, online /social media, etc.)*
- Identify and confirm speakers/presenters/entertainers
- Identify and contact sponsors/partners

start your planning as early as possible.

3-4 Months Ahead of Event

- Speaker/presenter/entertainer liaison: e.g.:
  - finalize presentation/speech topics
  - get bio information, photo
  - travel & accommodation arrangements
  - have contracts signed if appropriate, etc.
- Financial/Administration: for example, determine:
  - Registration fees
  - Set up/enable online registration
  - Sponsor levels/amounts
  - Identify items to be underwritten and accounting tracking details
- Venue/logistics planning, e.g.:
  - Investigate need for any special permits, licenses, insurance, etc.
  - Determine and arrange all details re menu, A/V equipment, registration set-up, parking, signage, etc.
  - Review security needs/plan for the event with venue manager
- Publicity: Follow publicity plan, e.g.,

- Develop draft program
- Create draft event script (e.g., MC, speaker introductions, thanks, closing, etc.)
- Develop publicity pieces -- *e.g., newsletter articles and/or ads, radio spots, print blog posts articles for submission to other publications and/or ads, etc.*
- Request logos from corporate sponsors for online and printed materials
- Develop and produce invitations, programs, posters, tickets, etc.
- Develop media list & prepare News Release, Media Advisory, Backgrounder and all media kit materials (e.g., speaker info, photos, etc.)
- Create event page on your website
- Enable/create email event notifications
- Create a Facebook event page
- Develop a promo video and post on YouTube and your Facebook page
- Register your event on a variety of online event calendars
- Create some buzz on your blog or member forums
- Determine VIPs and create invitation & tracking document (e.g., spreadsheet)

2 months prior to event

- Send reminders to contact list re registration/participation
- Presenters/Speakers: e.g.:
  - Confirm travel/accommodation details
  - Request copy of speeches and/or presentations
- Sponsorship: Follow up to confirm sponsorships and underwriting
- Publicity:
  - Release press announcements about keynote speakers, celebrities, VIPs attending, honourees, etc.
  - Post your initial event news release on your website and circulate to all partners, affiliated organizations, etc.

1 week ahead

- Have all committee chairs meet and confirm all details against Master Plan – and ensure back-up plans are developed for any situation (e.g., back-up volunteers as VIP greeters, additional volunteers for registration or set-up, etc.)
- Finalize event script
- Brief any/all hosts, greeters, volunteers about their event duties and timelines
- Final seating plan, place cards, etc.
- Provide final registration numbers to caterer
- Make print and online copies of any speeches, videos, presentations, etc.
- Final registration check, name badges & registration list
- Determine photo op and interview opportunities with any presenters, VIPs etc. and confirm details with interviewee and media

1 day ahead

- Confirm media attending
- Ensure all signage is in place
- Ensure registration and media tables are prepared and stocked with necessary items (e.g., blank name badges, paper, pens, tape, stapler, etc.)
- Ensure all promo items, gifts, plaques, trophies, etc. are on-site

Event day

- Ensure you have copies of all instructions, directions, phone numbers, keys, extra parking permits for VIP guests, seating charts and guest lists with you
- Check-in with each Committee Chair to ensure their team is on track

Immediately following event

While you need to conduct a thorough evaluation and update your budget, there are post-event publicity, fundraising and member development opportunities that you can take advantage of with just a little pre-event planning. Here are some of the activities you might consider once the event is over:

- Financial status: gather all receipts, documentation, final registration data, etc. and update budget
- Send thank-you's and acknowledgement letters to:
    - Sponsors
    - Volunteers
    - Speakers/presenters
    - Donors
    - the Media

In your thank-you notes, be sure to remind the recipients of the event's success – and how they contributed (e.g., dollars raised, awareness - number of participants, etc.).

- Post-event publicity – see publicity section that follows
- Conduct a Post-Event Survey – to learn what people enjoyed about your event, and where you have room to improve.
- Follow-up Communication with Event Participants
- Reach out to event participants – thank them for participating and promote your ongoing programs and how they can support you throughout the year by joining, volunteering or making a sustaining donation.
- Conduct a thorough evaluation

We hope you found this checklist helpful in getting started with event planning. Use this as a starting point to identify or assign activities to various volunteers or staff; or print this off so you can literally check-off items as they are assigned or accomplished.

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FUNDRAISING STRATEGIES

MOVES MANAGEMENT: THE SCIENCE OF FUNDRAISING

What is Moves Management?

Moves Management is the process of managing donor relationships. As David Dunlop, creator of the system, described it "The moves concept focuses major gift fund raising on changing people's attitudes so they want to give. To do this, we take a series of initiatives or moves to develop each prospect's awareness of, knowledge of, interest in, involvement with, and commitment to the institution and its mission."

Simply put, Moves Management involves planning, over the course of the year, the strategies you will employ to further a relationship with a donor and to, hopefully, reach the desired goal.

What Are Moves?

- Moves represent cultivation opportunities
- A move must penetrate the consciousness of the prospect regarding the organization or giving opportunity. Also, the fund raiser must learn something about the prospect
- Cultivation must be according to a plan and be mission directed

What Are Examples of Moves?

- A behind the scenes tour of your facility
- Invitations to special events
- An "insiders" newsletter, delivered quarterly
- Invitation to lunch or dinner with CEO and/or program staff
- Invitation to give feedback on strategic plan or case statement

Cultivation Visits

Cultivation is the bedrock of all major gift fundraising activity. But all too often, fundraisers engage in endless cultivation with little or no planning and with no clear goal in mind. The Moves Management process strives to make cultivation activities focused and goal oriented. Some things to consider when preparing for a cultivation visit:

- **What is the best possible outcome and the minimum acceptable outcome**?
- Review key points to be covered during the call
- List small number of benefits generated by programs/projects which you believe will appeal to the prospect
- Determine what you will ask the prospect to do, agree to or react to
- List anticipated questions and your responses

<u>Steps to get started</u>
- Select 10-25 best prospects
- Gather research on each prospect
- Identify volunteer/board member and staff for each (this person will be responsible for cultivation and solicitation)
- Consult volunteer/board member/staff about prospect
- Develop strategy for each prospect with gift amounts and gift opportunities
- Plan next 5-10 moves
- Implement moves
- Review status every quarter months
- Review at end of year and move new prospects in or old prospects out

<u>Track Your Progress</u>
It is important to set up a system by which you can track your moves and progress. If you have a database that has a contact tracking component to it, check to see if it contains a pre-programmed Moves Management report. If not, call customer service at the database company and see if they will create one for you. You can also use Outlook or another calendar software. Enter the moves you would like to make throughout the year and set the reminder feature for each move. Finally, you can always use an excel spreadsheet.

<u>Moves Manager Job Description</u>
It helps to have one staff person dedicated the managing the Moves Management process. Listed below are sample duties for this staff person.
- Develop strategy for each prospect
- Track each prospect's relationship with the organization
- Plan contacts or moves for each prospect
- Coordinate and prepare volunteers/board members and staff
- Execute the plan. See that the contacts or moves are made
- Reconfigure the strategy as things go along and refine the plan accordingly
- Coordinate the refined plan and execute the newly formulated moves