

# FUNDRAISING 101

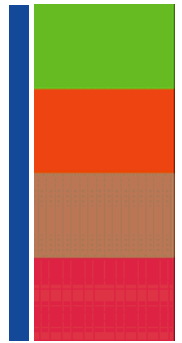


Younger Members Webinar

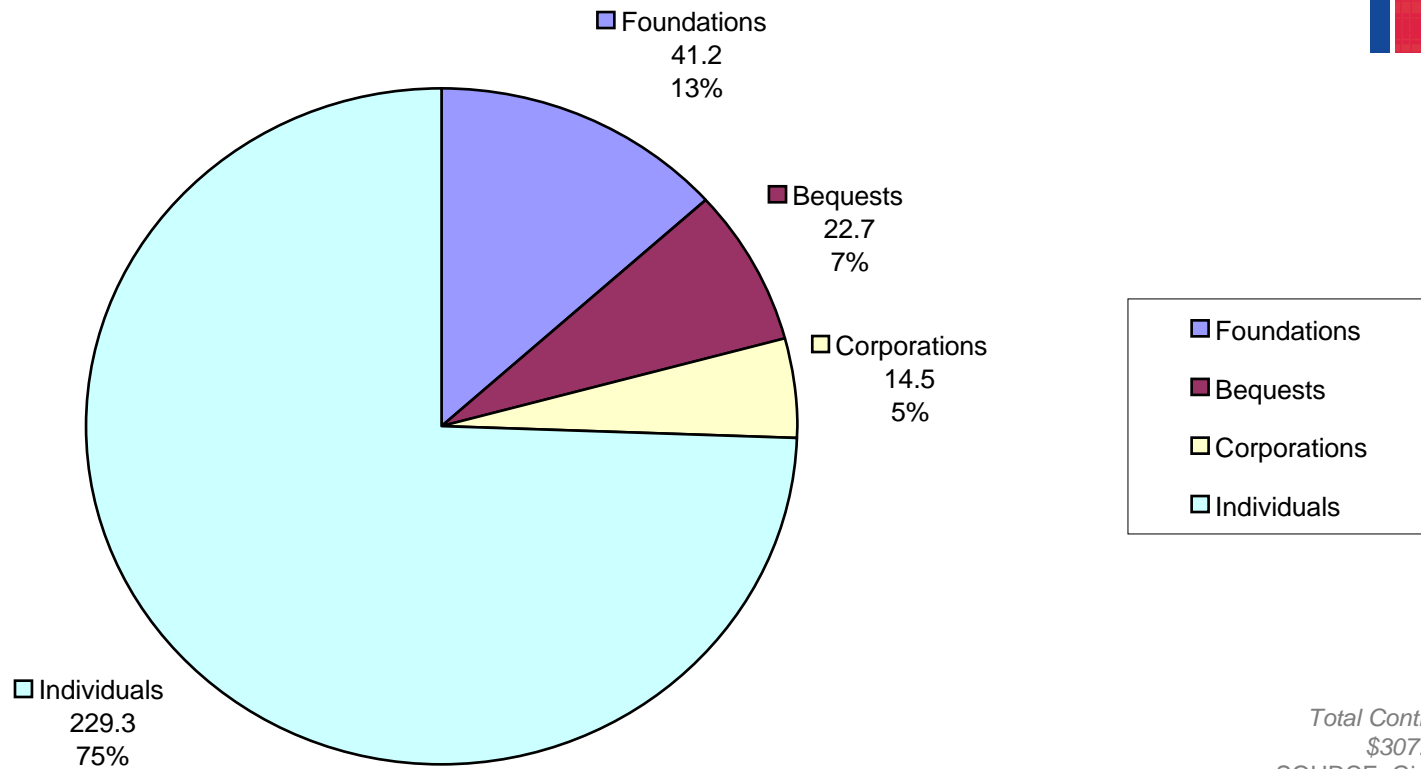
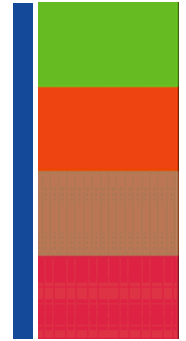
June 2 & 8, 2010

# FUNDRAISING BASICS

- Fundamental principle of fundraising
  - People give to people
- Find the right person to make the ask
- Cultivate (get to know )your prospects
- Thank your donors again--and again!



# Who gave in 2008 (in billions of dollars)



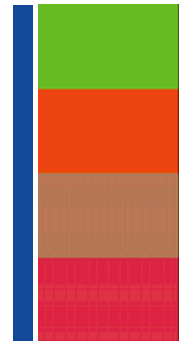
Total Contributions:  
\$307.7 billion\*  
SOURCE: Giving USA

\* All figures are rounded

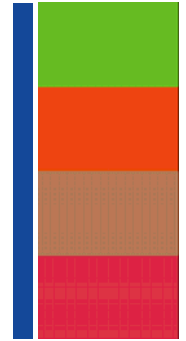
# FUNDRIASING IS A PROCESS

A system of...

- Planning
- Research
- Marketing
- Communications
- Evaluation

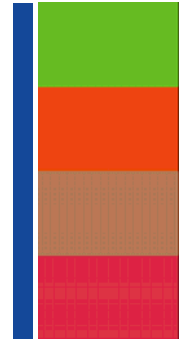


# THE FUNDRAISING PLAN



- The funding need
- The activities that need to be completed before soliciting for gifts
- Creating the plan
- Tracking and monitoring

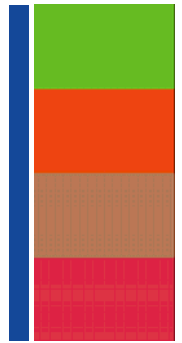
# THE FUNDING NEED



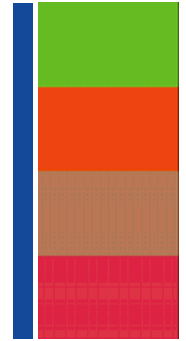
- How much money do you need to raise?
- Do you need unrestricted or restricted funds?
- Will you solicit individuals, corporations, or foundations?
- What fundraising methods will work best?
- Can you accomplish the plan with the resources that you have?

# FUNDRAISING METHODS

- Special Events
- Sponsorships
- Annual Appeals
- Direct Mail
- Capital Campaigns
- Foundation/Corporate Giving
- Planned Giving/Legacy Giving



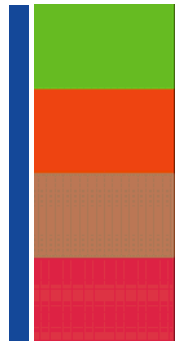
# SPECIAL EVENTS



- Think twice before undertaking events
- Ask if you have enough time and volunteers
- Seek sponsors
- Consider events others have done well
- Share examples of successful events

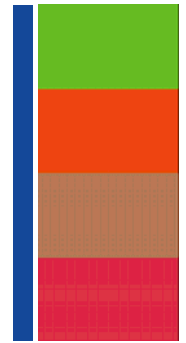
# SPONSORSHIPS

- Expand profits with sponsorships
- Develop sponsorship committee
- Develop sponsorship opportunities list
- Assign dollar amounts to opportunities based on visibility and value to sponsor not the cost of the event
- Develop prospect list
- Identify the right person to make the ask
- Thank your sponsors!
- Ask them again next year.

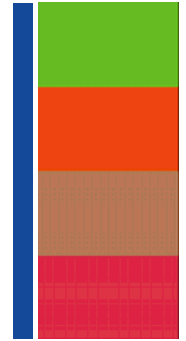


# DEFINE CASE FOR SUPPORT

- Describe your cause or case
- Relate it to your community
- Demonstrate it as real
- Convince the donor that the cause is worth supporting
- Explain how the funds will be used
- Create a sense of urgency

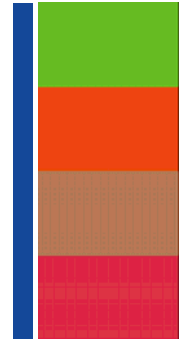


# PERSONAL CONNECTIONS



- People give to people
- Fundraising is relationship building
- Fundraising is peers asking peers
- Solicit those you know before others
- Compile list of prospects and match a solicitor to each
- People will only give if they are asked!

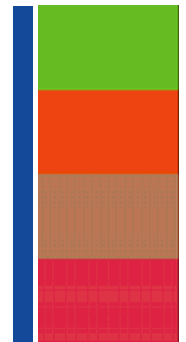
# IDENTIFYING PROSPECTS




- Fundraising is a “percentage” game—the larger the list, the greater chance of bringing in money
- Make a list of contacts—personal friends, colleagues, acquaintances, companies
- Have a system to maintain data for easy access and tracking

# CREATING THE PLAN

- Develop a timeline
- Schedule activities
- Establish due dates
- Assign duties with lead person identified
- Schedule Progress Reports and Final Evaluation Meeting



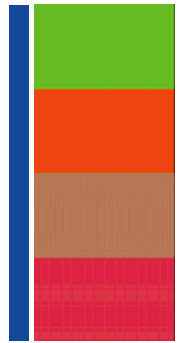
	FY 2010						
	March	April	May	June	July	August	September
<b>Direct Mail</b>	Email blast		Appeal Mailing		Email blast		Appeal Mailing
<b>Special Events</b>	Send invitation to OPAL and special reception	OPAL Special Rec and gala	Send invitation to luncheon in June	BOD Hosted luncheon		Send invitation to luncheon in September	BOD Hosted luncheon
<b>Foundation &amp; Corporate Grants</b>	Submit Proposals						
<b>Planned Giving</b>	1 - Newsletter mailing, feature gifts of retirement assets	Mail state-of-the-Foundation letter to all Legacy Society members	Deliver e-newsletters	Deliver e-newsletter	Deliver e-newsletter	Deliver e-newsletter	1 - Send TY mailing to all 5+ year donors
	2 - Begin design of PURL campaign						2 - Promote the Legacy Society
<b>Communications</b>	ASCE News	Online Workshop	ASCE News	ASCE News	Online Workshop	ASCE News	ASCE News
	SmartBriefs	ASCE News	SmartBriefs	SmartBriefs	ASCE News	SmartBriefs	SmartBriefs
	Student News	SmartBriefs	Student News	Student News	SmartBriefs	Student News	Student News
	Pat's Column	Student News	Pat's Column	Pat's Column	Student News	Pat's Column	Pat's Column
	Institute Pubs	Pat's Column	Institute Pubs	Institute Pubs	Pat's Column	Institute Pubs	Institute Pubs
		Institute Pubs			Institute Pubs		
	PG newsletter		I-News			I-News	
<b>Ads</b>	ASCE News	CE Magazine		ASCE News		CE Magazine	ASCE News
<b>Website</b>				Annual Report			
<b>Annual Report</b>				1- CE Magazine 2 - Mail to Society members and loyal donors			

# ACTIVITIES SCHEDULE

Activity	Due by	People Involved	Lead Person	Notes
Initial Meeting	xx/xx	Tom, Joan, Fred, Sally, John, Jim	TS	
Research Caterer	xx/xx	Joan, Fred, Sally	J	
Research Music	xx/xx	Tom, Jim, Sally	S	
Committee Meeting	xx/xx	Tom, Joan, Fred, Sally, John, Jim	TS	
Hire Caterer	xx/xx			
Hire Band	xx/xx			
Design materials for event	xx/xx			
Design PR materials	xx/xx			
Etc.,				

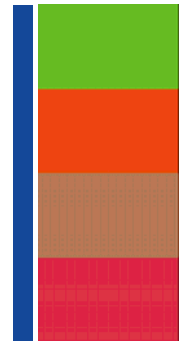
# MONITORING

- Core message clear
- Plan on track
- Appeals on schedule
- Solicitors making their contacts
- Solicitors reaching their goals
- All funds raised

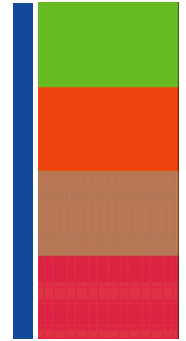


# SAYING THANK YOU

- You can never say thank you enough
- Send your thanks in a timely manner
- Recognize your donors at your events
- Cultivate your donor for future gifts

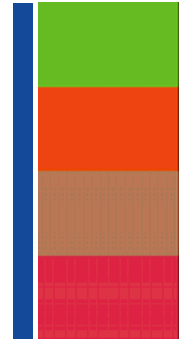


# EVALUATION



- What went right?
- Where could the activity been improved?
- Did you determine what the funding goal was?  
How did it compare to what was raised?
- Did you break the overall goal into manageable objectives? What could have been done to improve this step?

# EVALUATION (Cont.)



- What prospects did you decide to concentrate on? What others would you have liked to include? What methods did you use to involve them in the event? How effective were these methods?
- How did you track the various parts of the plan for the activity?

# Fundraising 101

## ■ Source:

*Asking, A 59-Minute Guide to Everything Board Members, Volunteers, and Staff Must Know to Secure the Gift*, by Jerold Panas

## ■ Questions???

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