

Session #11 Overview – Deeper Dive into Fund Development

April 12, 2019 | 9:00am – noon | Wendy Dyer & Rachel D’Souza-Siebert

DEEPER DIVE INTO FUND DEVELOPMENT:

Several previous Transition Series sessions have laid the groundwork for improving an agency’s fund development efforts/results. This workshop will take a deeper dive -- helping agencies operationalize and implement Development Plans and their key elements to generate gifts, especially major gifts. We will also explore higher level best practices in each of the funding buckets: foundations, corporations, events, and individuals including major gifts. Session time will incorporate presentation, small and large group discussion and applied-learning break out activities.

Special Instructions: Bring your agency’s Strategic & Development Plans (if you do not have them, bring agency documents that outline 2019 strategic and fund development goals/efforts).

Target Audience: Board members, Executive Directors & senior leaders involved in raising contributed income

Learning Objectives for Participants:

- Better understand best practices in each of the private sector revenue streams.
- Advance learning on how major gift relationships provide an outstanding return on fundraising investment.
- Improve knowledge about how to incorporate healthy habits into your agency’s fundraising program.
- Gain insight on great funding opportunities, including persuasive technology, social media & other platforms.

Key Concepts:

- Although online giving still represents only a fraction of total, it is growing dramatically every year.
- Silicon Valley companies are creating new and better digital products for positive change.
- Accelerated giving models can help increase donations.
- Consumer behaviors are being guided in many industries through predictive analytics and other tools – consider how nonprofit industry can incorporate these best practices.

Group Exercises: Study various research & determine which to incorporate into your fundraising program.

Racial Equity Lens Application: Consider: 1) building a true culture of philanthropy within your agency, supporting many, including people of color, to develop leadership skills and amplify their stories & experiences; 2) expanding Board member success by shifting priority from personal financial capacity to improving fundraising effectiveness; and (3) develop perspective about asking for money as an opportunity for people to donate to a cause they care about.

Major Take-Aways by Participants: 1) New ways to use technology (e.g. digital platforms/social media, social media analytics and videos) to augment giving plans; embed technological component (and goals) into development/strategic plan; 2) Develop better strategies, language, messaging for making the “ask”; importance of building long term relationships with donors; getting out of one’s comfort zone; 3) Show more gratitude to donors; develop a stewardship program; thank donors as they prefer; no donation is too small, but consider costs involved; 4) Use a development plan as a strategy, with metrics & outcomes; use gift tables; build development dashboards and conduct prospect research; and 5) Racial equity ideas; improve lens; anyone can give, never use race as an excuse.

Key Concepts in Common with Other Sessions: Session #2 Financial Health; #4 Financial Sustainability, #7 Innovation, #9 Board Engagement in Fund Devp and #15 Envisioning/Driving Direction.

To Learn More: Money For Good. <http://www.cambercollective.com/moneyforgood/>. Rapid Donor Cultivation. Boundless Minds. Blackbaud Best Practices for Fundraising Success.

About the Presenters:

Wendy Dyer, who leads Wendy Dyer Fund Development Consultants, has enjoyed serving the nonprofit sector as a consultant for nearly 25 years. Working as a team member, she has helped to expand programs, build schools, cultural and health centers, all of which brings opportunity to thousands of people in need. **Rachel D’Souza-Siebert**, MPPA, as Founder of Gladiator Consulting, has served the nonprofit sector for 10+ years and is a passionate advocate for collaboration, racial equity and community/movement-centered fundraising.