

Making the Case for Effective Fundraising

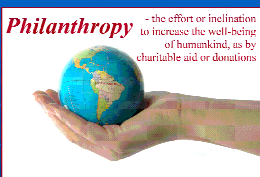
Jay R. Blankenship, MSW, CFRE
University of Wisconsin Milwaukee
School of Continuing Education

- ## Welcome and Introductions
- Overview of the workshop and learning objectives. Participants will:
 - Understand the organizational requirements for implementing an effective plan
 - Learn how to develop and write a compelling case statement
 - Learn how to develop consistent messaging that attracts funding support.
 - Understand how to raise funds to support general operating expenses.
 - How to develop meaningful relationships with donors that leads to larger gifts

- ## Resources
- Weinstein, Stanley. 2002. *The Complete Guide To Fundraising Management*. John Wiley & Sons, Inc., New York. ISBN:0-471-20019-0
 - Axelrod, Terry. 2000. *Raising More Money. A step by step guide to building lifelong donors*. Raising More Money Publications, Seattle

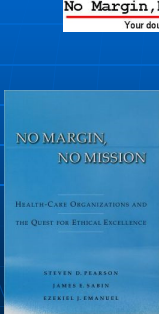
- ## Resources
- www.philanthropy.com
 - www.afpnet.org
 - www.guidestar.org
 - <http://www.techsoup.org>
 - <https://www.gailperry.com/>

Philanthropy



- Philanthropy** means "love of humanity" in the sense of caring for, nourishing, developing, and enhancing "what it is to be human"—on both the benefactors' (by identifying and exercising their values in giving and volunteering) and beneficiaries' (by benefiting) parts. The most conventional modern definition is "private initiatives, for public good, focusing on quality of life"

No Margin No Mission



- Revenue is not the enemy
- Fundraising is an ethical and valuable part of an organization
- Development staff are trained professionals with a job to do.
- Programs cost money
- Employees cost money

Development Starts at the Top



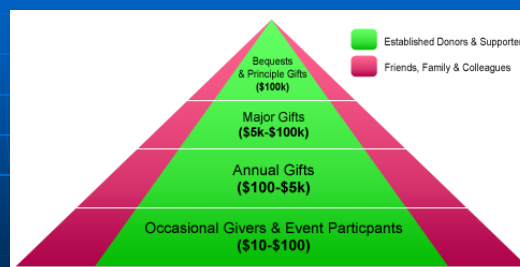
Development Starts at the Top

- An organizational culture is established and supported by organizational leadership
- It starts with the Board and the Executive Director
- The Board hires the Executive and the Executive establishes the expectations

Key Fundraising Principles

- People give to people.....to help people
- People give relative to their means
- Those closest must set the pace
- Successful fundraising
- The 80/20 rule
- The need for balance
- Fulfilling Dreams

The Development Pyramid



The Fund Development Plan

- Program budget - [Simple Program Budget.xlsx](#)
- Special Events
- Direct Mail - [YEA 2010.doc](#)
- Corporate Gifts
- Major Gifts
- Foundations and Government Grants
- Planned Giving
- Capital and Endowment Campaigns
- [HAWs Fundraising Plan.doc](#), [HAWs Resource Development Plan 2002.doc](#)

Fundraising Cycle Required Infrastructure



The Case For Support

- Organizational History
- Who does the organization serve?
- What are the needs of the community or people served?
- How does the organization address those needs?
- What is the organization's expertise?
- Mission, goals, and programs
- Why are funds needed?
 - [WPA Case Statement.doc](#), [HAWIS Case Statement.doc](#)
- How are you changing lives for the better?
- Let's discuss the elements of YOUR case for support.

Discussion

- What is the problem or need that you are addressing?
- What is the extent of the problem?
- What is the solution(s) to the problem?
- Why is your organization the best to provide help?
- How do you change people's lives?
- What would happen if your organization did not exist?
- Why do you need financial support? Make the case.

Start With The Problem!

By Richard Perry and Jeff Schreifels on May 31st, 2017



The Case

- A clear and compelling statement about the problem
- What the donor is going to DO about the problem
- How this solution will bring joy, restoration, hope and redemption
- And then you talk about the gift

Spread the word

- Develop the compelling case
- Make it look like a campaign – something new
- Get out and talk – civic organizations, TV, radio, press releases, invite people in, give tours.
- Social media
- Website

Current Trends and Best Practice

- Trends
 - Movement toward major gifts
 - Social Media
 - Online Giving - Apps
 - Millennials
 - Venture Philanthropy
 - Video
 - Outcomes/ROI/Business Case

Current Trends and Best Practice

■ Case Examples

- Rocks for a Reason -
<https://www.facebook.com/search/top/?q=rocks%20for%20a%20reason#>
- <http://www.chw.org/giving-and-volunteers/rocks-for-a-reason>
- Bucket Challenge - <https://youtu.be/fxDAYUIXphg>
- www.donorschoose.org
- DIY – Do it Yourself -
<https://www.cancer.org/involved/fundraise/diy-fundraising.html>
- Video - <https://youtu.be/qG-gfmFTuOw>
- Amazon - <https://org.amazon.com/>

Wisconsin Needs the Healthiest Kids in the Nation

