



**Stronger South Dakota**  
**Lunch and Learn Series 2021**

**Fundraising & Donor  
Engagement in Uncertain  
Times**

- Participants will be put on mute once the call begins
- Staff will be monitoring the chat room, should you have a question during the presentation
- We have reserved time at the end for questions
- The meeting will begin soon
- We will record and make the event available to view

# Your Hosts



## **Beth Massa**

- SDCF Regional Director of Foundation Relations
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## **Jeff Veltkamp**

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## Participant Introductions

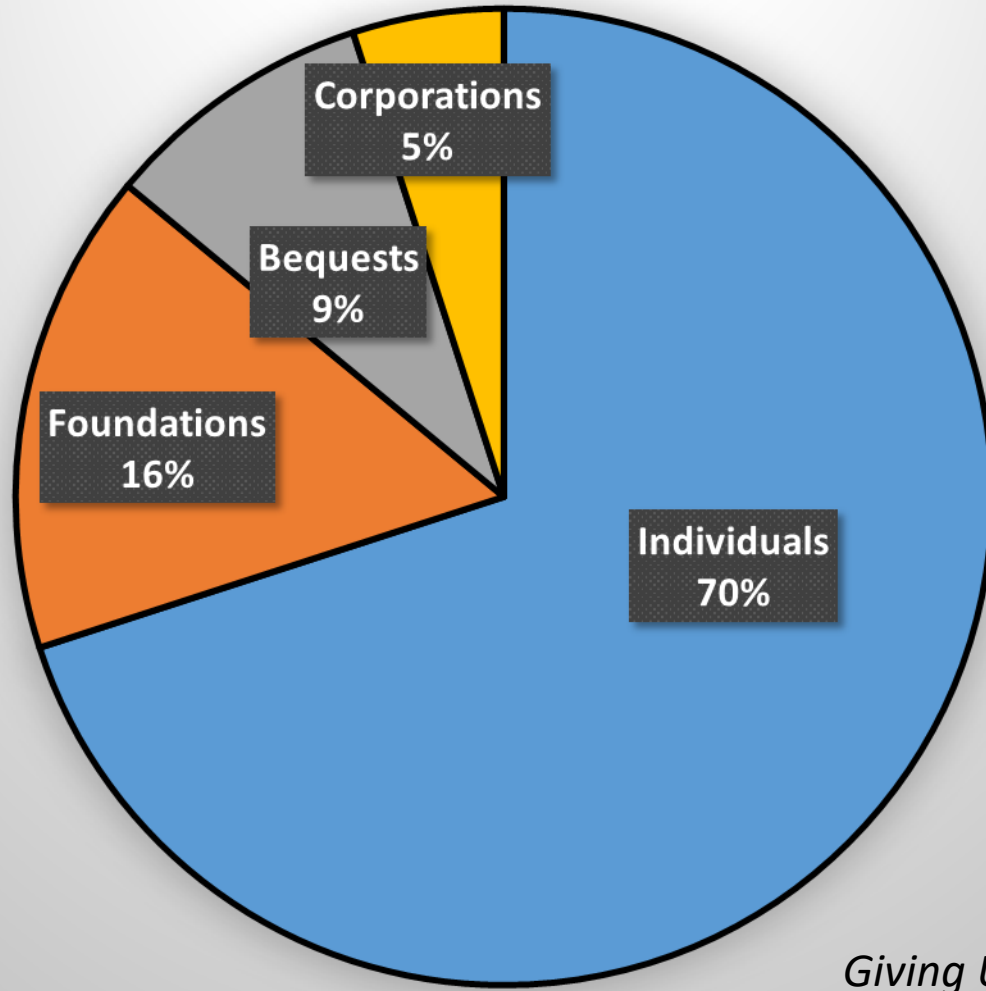
Please share your name, community or nonprofit.

### Two Poll Questions

Visit [www.menti.com](https://www.menti.com) and type the **CODE: 67 83 44 4**

1. How has the pandemic changed or impacted your fundraising and why?
2. What do you most want to learn about fundraising and donor engagement today?

# Where Does The Generosity Come From?



*Giving USA 2018*

- \$410.02 Billion in total gifts
- 79% of all giving comes from Individuals

The money is there...

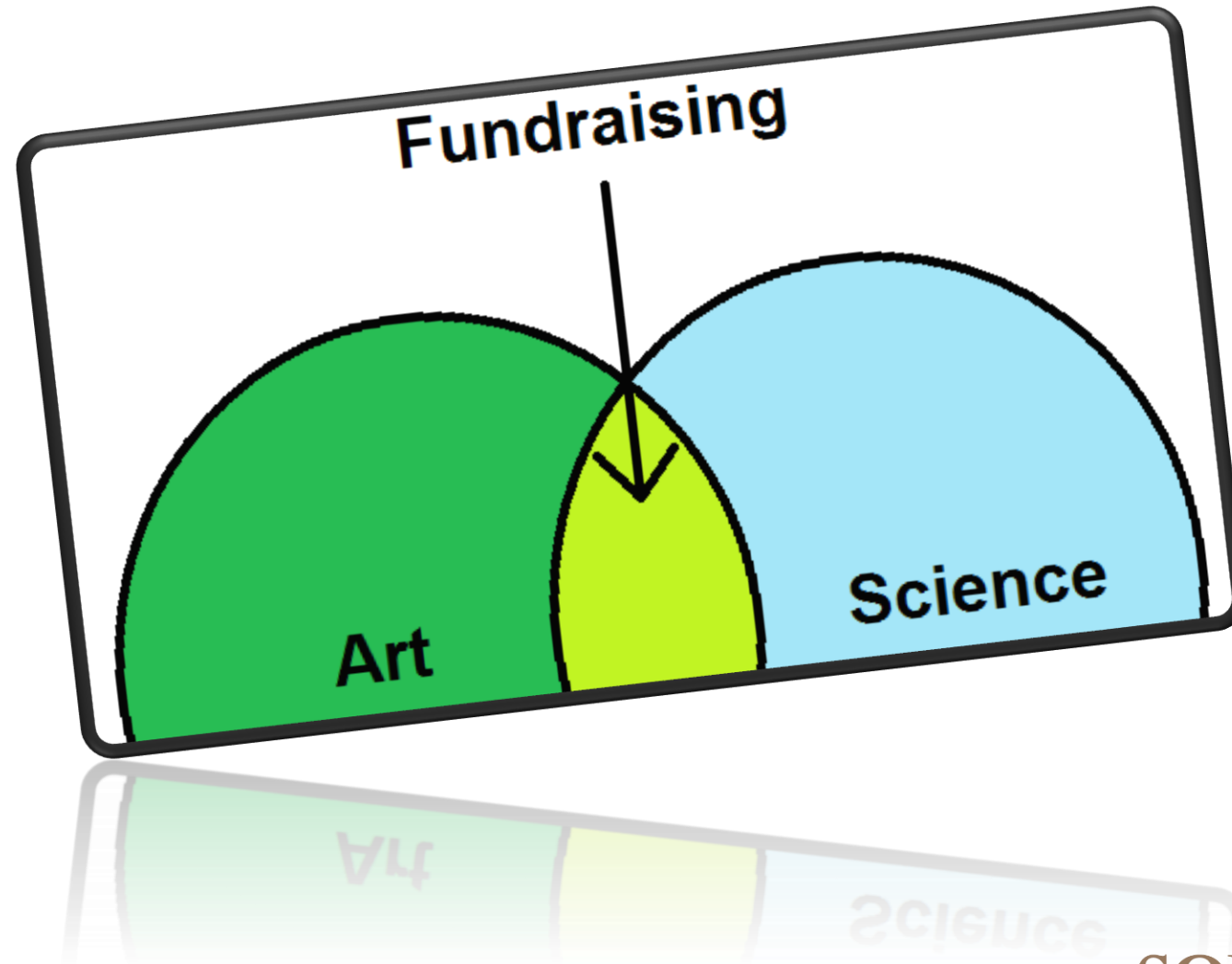
# Capture the Transfer of Wealth!

**\$75 Trillion transfer of wealth in the  
United States between 2010 and 2060**

## **South Dakota**

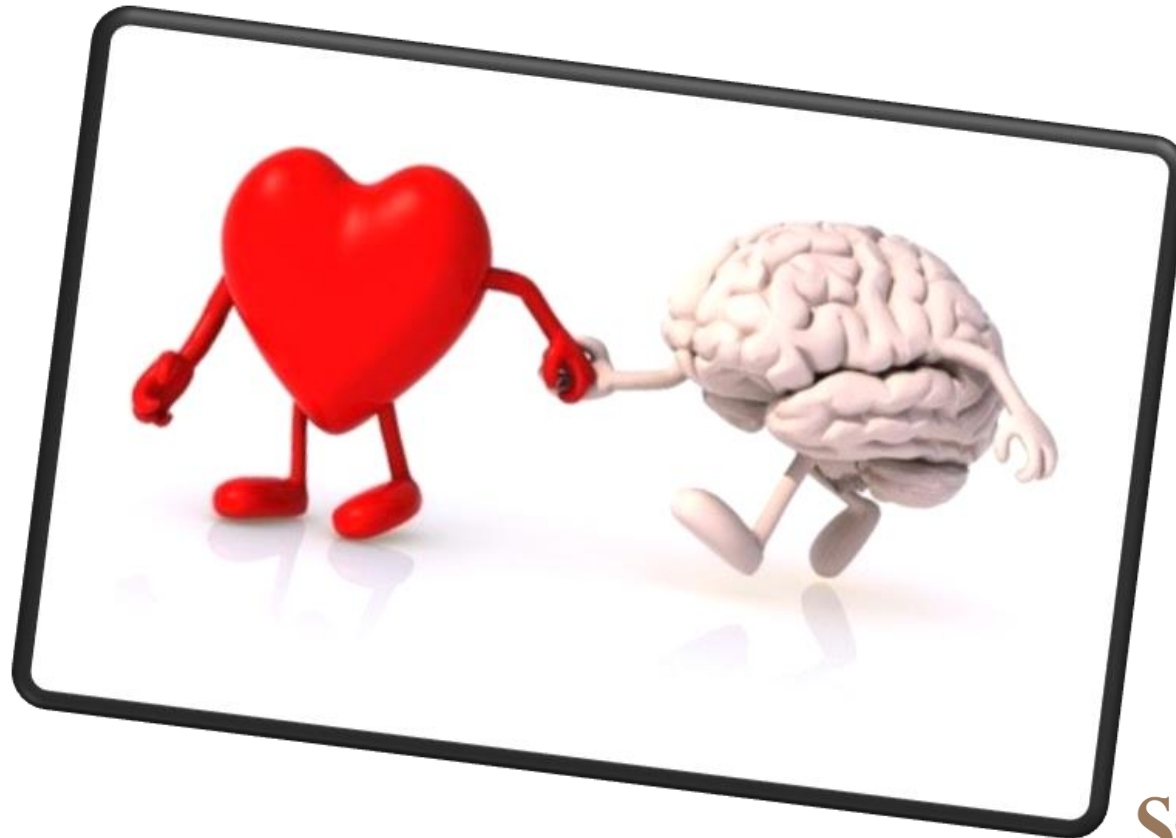
- **\$101 - \$112 Billion transfer of wealth in next 50 years**
- **\$2.02 billion on average will transfer from one generation to the next each year**

# The Art and Science of Giving...



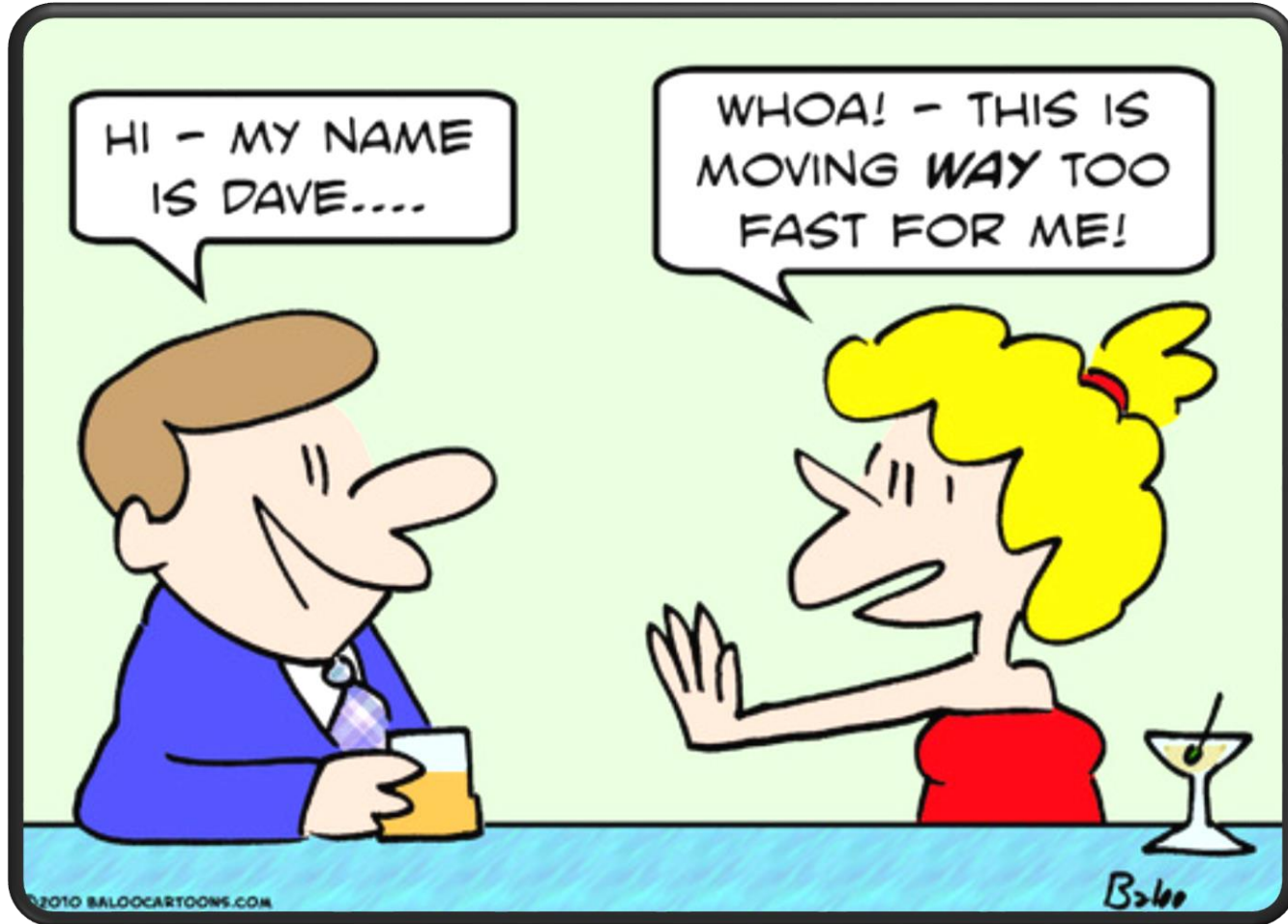
The Art...

***“Appeal to the emotional and deal with the rational.” – Bill Sturtevant***





# It's a Dating Relationship...



**Be Patient  
This Takes Time**



Storytelling...

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**Get your donors to tell their story...**

**Tell your story...**

**Listen...**



# Storytelling...

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**Charity**



**Family**

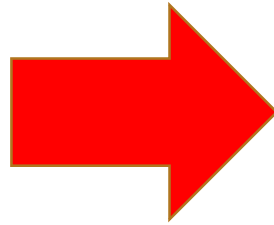


**Government**



***You Get to Pick Two!***

# Storytelling...



**EDUCATION!!**

# Donor Cultivation Cycle

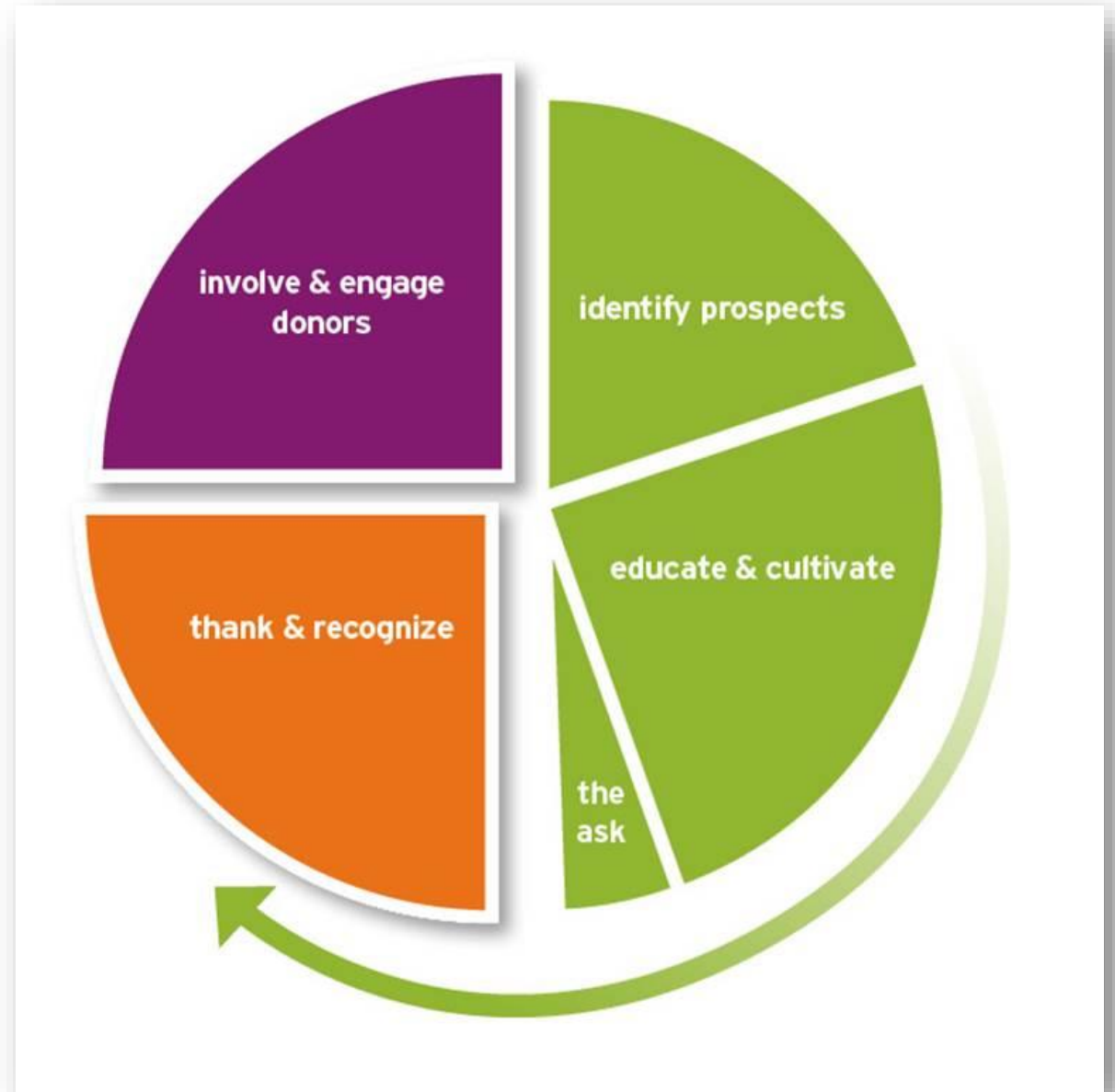
25%-involve and engage donors

25%-thank and recognize

20%-identify prospects

20%-educate and cultivate

10%-the ask



# **Campaign “Starting” Plan:**

***Communicate – Communicate – Communicate – Communicate – Communicate***

- 1. Rally the troops and see if there is a shared vision**
- 2. Recruit your volunteer leadership**
  - Consider the skill sets you’ll need to be successful
  - These folks need to be people of influence willing to be donors and doers.
- 3. Craft your Story (Why)**
  - Case for support
  - Need to be able to communicate clearly why you are asking for money and how this will impact/benefit them
- 4. Set your goal – be specific**
  - Well-defined goal with a specific timeline (creates urgency)
  - Develop gift chart
  - Populate chart with names
- 5. Fundraising Campaign**
  - Quiet Phase
    - Visit face-to-face with top prospects
    - Secure 50%-75% of goal before you go public
    - REMEMBER, once you go public, the major gifts will slow down
  - Public Phase
    - Mail solicitation
    - Social media
    - Events
    - Community meetings
- 6. Marketing Campaign**
  - Newspaper, School bulletin, Facebook, Big Splash showing impact
- 7. Celebration!**
  - Community event, Celebrate success, Thank donors, Share vision for future

***Communicate – Communicate – Communicate – Communicate – Communicate***

**Have A Plan**

## Highly Confidential

Officer: \_\_\_\_\_

Name: \_\_\_\_\_ Revision Date: \_\_\_\_\_

Gift Goal: \$ \_\_\_\_\_

Gift Project: \_\_\_\_\_

Solicitation Target Date: \_\_\_\_\_

### Cultivation Strategy:

- 1) The Objective: \_\_\_\_\_
  - a) Activity/Move: \_\_\_\_\_
  - b) Activity Date: \_\_\_\_\_
  - c) Staff Involved: \_\_\_\_\_
  - d) Volunteers: \_\_\_\_\_
- 2) The Objective: \_\_\_\_\_
  - a) Activity/Move: \_\_\_\_\_
  - b) Activity Date: \_\_\_\_\_
  - c) Staff Involved: \_\_\_\_\_
  - d) Volunteers: \_\_\_\_\_
- 3) The Objective: \_\_\_\_\_
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  - d) Volunteers: \_\_\_\_\_

**Have A Plan**

Have A Plan

Have A Plan

Gift Range Table: 1,000,000 Campaign									
# of Prospects	# of Gifts	Average Size	Total Gifts	Cumulative Total	Percent of Goal	Names of Suspects/Prospects			
3	1	\$150,000	\$ 150,000	\$ 150,000	15%				
6	2	\$100,000	\$ 200,000	\$ 350,000	35%				
9	3	\$ 50,000	\$ 150,000	\$ 500,000	50%				
15	5	\$ 25,000	\$ 125,000	\$ 625,000	63%				
21	7	\$ 10,000	\$ 70,000	\$ 695,000	70%				
30	10	\$ 7,500	\$ 75,000	\$ 770,000	77%				
45	15	\$ 5,000	\$ 75,000	\$ 845,000	85%				
60	20	\$ 2,500	\$ 50,000	\$ 895,000	90%				
105	35	\$ 1,000	\$ 35,000	\$ 930,000	93%				
150	50	\$ 500	\$ 25,000	\$ 955,000	96%				
300	100	\$ 250	\$ 25,000	\$ 980,000	98%				
600	200	\$ 100	\$ 20,000	\$ 1,000,000	100%				
1344	448		\$ -	\$ 1,000,000	100%				
Several rules should guide the formulation of a gift range chart:									
• Above all, the lead gift should constitute 10 percent or more of the goal,									
• About 40 to 60 percent of the goal should come from the ten to fifteen largest gifts.									
• About 33 to 50 percent should come from the next 100 to 150 gifts.									
• About 10 to 20 percent of the goal should come from all other gifts.									



**What is my role?**

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**Your role is to give people a powerful enough reason to support your organization!**

**You don't have to be an expert!**

“Shift” how you see fundraising...

**OPPORTUNITYISNOWHERE**



Did you ask for a gift, but your prospective donor said no?

**Remember, “no” today could be a “yes” tomorrow.**

# Tips to improve engagement with your donors

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- ✓ **Keep in touch.** Sending a note to say you're thinking of them is a great way to stay connected, especially in this time of crisis and isolation.
- ✓ **Be yourself.** You care about your organization. Let your passion shine through in your communication – before (and after) the gift.



Did you receive a gift?

**Remember, you can never say  
“thank you” too many times.**

# Tips to improve engagement with your donors

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- Express your gratitude in conversation and in writing.
- Your donor relationship starts with the first “thank you,” whether you receive a gift or not.

# Tips to improve engagement with your donors

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- **Be a good steward.** Manage the gift in the way your donor intended.
- **Address changes proactively.** Meet with your donor and explain if their gift can support another program.





# Create impact stories

- ✓ **Ask how your donor wants to be recognized.**  
How do they feel about public recognition?  
Find out first!



- ✓ **Recognize your donor accordingly.**  
Because of you...
  - We could get this done.
  - We were able to make a difference.

# Share impact stories



**South Dakota Community Foundation** @SouthDa... · Mar 25, 2020

The Larson family, and Larson Manufacturing, have supported numerous organizations in the state, including the Children's Museum of South Dakota. #StrongerBrookings #StrongerSouthDakota

Find out more about leaving a legacy: [bit.ly/2lbGxsf](https://bit.ly/2lbGxsf)



**SOUTH DAKOTA**  
COMMUNITY FOUNDATION

## Social media updates

Twitter post @SouthDakotaCF



Huron Hometown Heroes Robert and Emily Entwisle are recognized by Stephanie Judson and Steve Gohn for their gifts and support to the Huron Community Foundation.



Norbert and Jane Sebade were named Hometown Heroes, recognizing their endless support of the Wall community.

## Annual Reports

2019 Annual Report excerpt

Donor relations and  
engagement is  
**all about your donor –**  
especially in uncertain times.





"And that's our plan.  
Any questions?"



*Stronger South Dakota*  
**Lunch  
&  
Learns**

**Noon-1 p.m. CT/11 a.m. - noon MT**

Tuesday, January 12th  
**Fundraising and Donor Engagement in  
Uncertain Times**

Wednesday, February 10th  
**State of the Foundation**  
Stephanie Judson, SDCF President & CEO

Tuesday, March 9th  
**CSA Role in Community/Economic  
Development**  
Patrick Gallagher, SDCF Community  
Development Coordinator, Northeast SD  
*For community savings account leaders*

<https://sdcommunityfoundation.org/for-communities/stronger-south-dakota-lunch-and-learns/>



# Thank You!

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