Fundraising for Animal Welfare Organizations

With Kim Klein

Sponsored by: Humane Network

KLEIN & ROTH CONSULTING

Real money. Real people. Real change.

In this workshop you will learn:

How to:

- Manage an effective fundraising program
- Build a broad base of donors
- Help board and other volunteers to raise money
- Identify prospects
- Ask for money in person

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Getting Started

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Focus on People

Philanthropic Giving: 2017

TOTAL GIVING: $410.05 billion

- ▸ **Individuals:** **$286.65** **70%**
- ▸ **Bequests:** **35. 70** **9%**
- ▸ **Foundations** **66.90** **16%**
- ▸ **Corporations** **20.77** **5%**

Source: Giving USA

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Focus on People Who Give:

- ▸ **Most people: 70% of adults give away $$**
- ▸ **Give to 5-10 organizations each year**
- ▸ **Equal numbers of men and women.**
- ▸ **# 1 reason people make a donation: someone asked them.**
- ▸ **56% of households have a pet, and the vast majority of those give away money**

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Talk about Money

People Give to People…with Causes

Focus on building loyalty to the cause

Get into an "EXCHANGE" Frame

Go from this:
"*Please, please, please…*"

To this:
"*I think you would be interested….*"

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Focus on Building Relationships

Invite the donor to give thoughtfully

Always thank your donors

Invite the donor to engage: donations, petitions, protests, helping with fundraising

Invite the first gift from your list.

Invite everyone to join your list

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Comparing Strategies

	Strategy	%
More Time per donor	In person asking	50%
	Personal Phone Call	25%

	Personal Letter or email	10-15%
	Phone bank	3-5%

	Direct Mail	.5-1%
	Email	.08%

Less Time per donor	Special Events	Varies

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What do you need and by when?

SET GOALS

A Simple Chart

Goal: $50,000

# of gifts	size	# of prospects*
2	$5000	8
4	$2500	16
10	$1000	30
20	$500	40
40	$250	80

76 gifts X 2 = 152 prospects

*You will need 2 times the number of prospects as the number of gifts

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Make Sure Every Entry Point Invites a Donation

If I found out about your organization from
--your website,
--your e-newsletter
--a friend
--a special event
--dropping by your office

Would I know that you raise money from people like me?

Build a Team of Askers

Some people must be willing to ask in person, do follow up e-mails and make phone calls!

Every Fundraising Team Needs:

A way for everyone to participate. Some:
- will ask for money and some won't
- love events, and some don't
- enjoy working alone, others in teams
- prefer approaching strangers
- prefer working with institutions

Who are you?

Is your team balanced amongst all the styles?

Every Team Member Should be Able To:

- ✓ **State a one sentence, easy to remember mission or vision statement**
- ✓ **Name three important accomplishments**
- ✓ **Name three goals for the current year**
- ✓ **Talk about the total budget**
- ✓ **Talk about how the organization raises $.**

Every Team Member Has A Plan

I, Betty Lou Board Member, will:
- Give $100 before November 1.
- Help raise $1000 by hosting a house party at my house in May.
  - GOAL: 20 new donors @ $25-100 each
- Create a Giving Page (goal $500)

I prefer not to:
   Participate in the phone-a-thon

I will not:
   Come to the auction—sick of those!

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Donors are on a Trajectory

"**This is one of the organizations I support**"

"**I like this organization a lot**"   👍 Like

"**This is one of my top three giving priorities**"

PRIORITY!

Segmentation:
Divides donors and prospects into categories to meet donors where they are.

Focuses your appeals and maximizes your fundraising efforts.

Simple Segments

Segment:	Donor feels:
✓ First time donors:	Welcomed
✓ Second time:	Engaged
✓ Habitual:	A sense of identity
✓ Thoughtful:	Org is a priority
✓ Legacy:	Org should exist forever

Lapsed Donors

Donor hasn't given in over 24 months:

Goal:
   Re-engage or let go. Track when the lapse occurs.
Work harder for donors who lapse after several gifts.
Methods:
   Series of three: e-mail, text and/or a phone call:
1. "Is it all over between us?"
2. "In the interest of good stewardship…"
A few months later,
3. "Did you miss us?"

Look for Patterns

Some donors give several times a year and respond well to being asked often

Some donors give once a year and prefer not to be asked frequently.

Keep these two categories straight is important!

Size of Gift

Donors who give big gifts get more personal attention
❑ **Thank you call**
❑ **Personal note* saying where the gift is going**
❑ **Invitation to be in touch**
❑ **Occasional note with no ask**

"note" means any written personal contact. Text, e-mail, pm, card

More Elaborate Segments

You may want to analyze your donor base and segment donors who only:
- Come to events, or a particular event
- Give to one particular program
- Give episodically in response to an immediate need
- Give in response to the newsletter

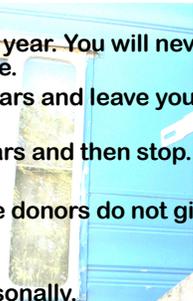Appeal to them the way they give

Keep in Mind:

Some donors give:
- a small amount every year. You will never be their favorite cause.
- a small amount for years and leave you $ in their will
- large amounts for years and then stop.

The majority of first time donors do not give again.

Don't take anything personally.

What Are Your Challenges?

We do these things very well:

We do these things adequately:

We need to improve:

This is what we will focus on:

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Identify Triple A Prospects

Access:
 Prospect knows you or someone who knows you.
Ability:
 Gives away money
Affinity:
 Cares about this cause or something similar

Gather Information That Helps

Less Helpful

Loves animals

Active in local politics

Very low key about giving

Flew to DC to join protests about pig farming

Ran for City Council twice and lost by a small margin

Has five rescue dogs and supports a feral cat colony

Does not believe donors should get anything for their giving. Turned down being honored at Gala

More Helpful

What do you need to know? How will you find out?

Focus on personal asking

Affinity for the Cause is Critical

Sounds great. I think it is fantastic.

I want to be part of this. Here is my gift.

I wish you well

I will give money

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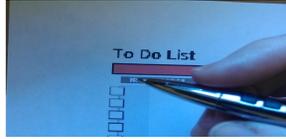Keep in Mind

1. Success is asking

2. Be OK with no

3. Focus on what you believe, not what you fear.

4. You don't have to ask everyone

Preparation

Have ready:
- Stories
- Statistics, including comparisons
- Philosophical points
- Responses to common objections and questions
- Budget and fundraising success so far

The Phone Call

Have ready:
- *Opening sentence*
- *Message for VM*

- *Most exciting thing about the project*
- *Where are you toward the goal?*
- *How much do you want?*
- *What happens now?*

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Prepare Questions To Ask

How did you first hear about us ?
How long have you lived here?
How is that donut shop that just opened?
What is most compelling about this issue to
you?

Tell Your Own Story

I got involved in this because….

The most surprising thing to me about this issue is….

I loved meeting people who have been giving for a long time because….

Ask yourself, "Why Am I Talking?"

WAIT

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The CLOSE

Create an Action Plan

❑ Do we need to re-think any of our strategies? If yes, which one(s) and how?

❑ What are next steps with our board and volunteers? Be specific.

❑ How can personal solicitation become a priority? When? Goal?

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What Are You Going to do Now?

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About the Presenter

Kim Klein is the author of five books, including the classic text, Fundraising for Social Change, recently released in a SEVENTH edition. She also wrote Reliable Fundraising in Unreliable Times, which won the McAdam Book Award in 2010.
She has provided training and consultation in all 50 United States, five Canadian provinces and 21 other countries.
She is a lecturer at the School of Social Welfare at the University of California, Berkeley, and has served as guest faculty at the Haas School of Business at UC Berkeley and Concordia University in Montreal.