

Fundraising

A MONTHLY REPORT OF SUCCESSFUL FUNDRAISING IDEAS, STRATEGIES AND MANAGEMENT ISSUES

March 2015 • Volume XXIII, No. 3

Some of What's Inside...

- Make the most of your milestones ... p. 2
 Show businesses how to plug in p. 3
 Tips for researching individuals p. 4
 Build a mailing list with thought..... p. 5
 Set meaningful reunion class goals... p. 6
 Keep challenge donors updated p. 7
 Help donors 'build' a gift p. 8

Encourage Contributions From Churches, Synagogues

Some nonprofit organizations have ties to a particular religion. Others do not. In either case, you have to decide whether faith-based organizations might support your cause with annual contributions.

If you decide it's worth your time to encourage giving among religious groups, you might want to consider these approaches:

1. List faith-based organizations as a separate category in your annual honor roll of contributors.
2. Explore the possibility — and consider the appropriateness — of a friendly competition among congregations to raise funds for your charity.
3. Provide religious organizations with bulletin inserts that make the case for supporting your cause.
4. Encourage your organization's existing contributors to approach their church or synagogue for support on your behalf.
5. Offer to provide faith-based organizations with a presentation about your agency and its work.
6. Meet with your community's clergy group to discuss your cause and the most appropriate approaches for seeking support.

FOOD FOR THOUGHT

The Case for Mini-Campaigns

What exactly defines a mini-campaign, and when might it be the right approach for your nonprofit organization? Here Samuel Duncan, senior development officer for SoutheastHEALTH, a regional medical center located in Cape Girardeau, MO, addresses these questions.

What is a mini-campaign?

"Coming out of the recent recession, our medical center, like many others, had given up the thought of operating a major capital campaign, as the times had changed the giving patterns of many donors. I was serving as a member of the advisory board of the Philanthropy Leadership Council, and we reviewed several case studies of smaller, issue-focused fundraising campaigns that were quite successful. In the case of our medical center, we then focused our mini-campaigns on the three c's, the integral mission of our hospital: cancer, children and cardiology."

How does a mini-campaign work?

"An institution can operate several mini-campaigns concurrently. Mini-campaigns are often structured around an event or a series of events. The key is to focus on the cause or mission. Prior to altering our fundraising objectives in this manner, I had a major donor to our hospital say to me, 'I don't know what this is all about; what do you need the money for?' The connection or buy-in wasn't there for this donor.

"We structure our three mini-campaigns around events that capture the cause: a Princess Tea to benefit the neo-natal wing, a Christmas pageant for the cancer unit, and a golf tournament for the cardiology program. Each mini-campaign zeroes in on different benefactors — mothers and grandmothers for the children's wing, grateful service recipients and families for the cancer center and business leaders for the heart program."

How are major gifts impacted by mini-campaigns?

"One might make the assumption that major giving would be negatively affected by the mini-campaign strategy, but our experience has been the opposite. At our medical center, major gifts have increased tenfold since we embarked on our mini-campaigns. I believe the increase is because our fundraising directly reflects where the money is needed and has the most impact. We create a strong connection to our donors' passions and point our benefactors to where their money is working, so our fundraising is very much action-based."

How is a mini-campaign different from a traditional capital campaign?

"The difference lies in the focus on the cause and breaking the overarching fundraising goal into small pieces that directly connect to the hearts of donors. Semantics are important, and there is something about the term campaign that coalesces the energy and synergy of volunteers, staff members and board members and also creates an important linkage and sense of urgency and importance with donors."

Source: Samuel Duncan, Ph.D., Senior Development Officer, SoutheastHEALTH, Cape Girardeau, MO. Phone (573) 986-6625. E-mail: sduncan@sehealth.org.
 Website: www.sehealth.org

Memorial Giving Tips

- Whenever your agency receives memorial gifts in remembrance of a recently deceased individual, be sure to point out endowment fund gifts to the family of the deceased should they choose to add to what has been given thus far — making the memorial even more permanent.

Copyright © 2015 Wiley Periodicals, Inc., A Wiley Company

Successful Fundraising (Print ISSN 1070-9061 • E-ISSN 2325-8624) is published monthly by Wiley Subscription Services, Inc., A Wiley Company, 111 River St., Hoboken, NJ 07030-5774.

Managing Editor: Scott C. Stevenson

Annual subscription rates for individuals: \$159 (print and electronic); \$129 (print only); \$99 (electronic only).

To order single subscriptions, call toll-free 888-378-2537, fax toll-free 888-481-2665, e-mail jbsubs@wiley.com, or write Jossey-Bass, One Montgomery Street, Suite 1200, San Francisco, CA 94104-4594. Discounts available for quantity subscriptions: contact Customer Service at jbsubs@wiley.com.

POSTMASTER: Send address changes to Successful Fundraising, Jossey-Bass, One Montgomery St., Suite 1200, San Francisco, CA 94104-4594. Outside the United States, call 415-433-1767 or fax 415-433-7405.

Copyright © 2015 Wiley Periodicals, Inc., A Wiley Company. All rights reserved. No part of this publication may be reproduced, stored in a retrieval system, or transmitted in any form or by any means, electronic, mechanical, photocopying, recording, scanning, or otherwise, except as permitted under Section 107 or 108 of the 1976 United States Copyright Act, without either the prior written permission of the Publisher or authorization through payment of the appropriate per-copy fee to the Copyright Clearance Center, 222 Rosewood Drive, Danvers, MA 01923, 978-750-8400, fax 978-646-8600. Requests to the Publisher for reprint permission should be addressed to the Permissions Department, c/o John Wiley & Sons, Inc., 111 River St., Hoboken, NJ 07030-5774, 201-748-6011, fax 201-748-6326. For more detailed information on permissions, please visit www.wiley.com/go/permissions.

This publication is designed to provide accurate and authoritative information regarding the subject matter covered. It is provided with the understanding that the publisher and editor are not engaged in rendering legal counsel or other professional service. If legal advice is required, the service of a competent professional should be sought.

JB JOSSEY-BASS™
A Wiley Brand

Recognize Your Consecutive-Year Donors

Establishing strong recognition programs for your consecutive-year donors can help ensure the continuous foundational support needed to carry out your most important projects and programs. Here are two examples of what's working across the country:

- **Emory University** has established The Judson C. Ward Consecutive Giving Society in honor of the late Dr. Judson C. "Jake" Ward, the school's second dean of alumni and former dean of the college. The goal is to encourage consecutive years of participation in giving to Emory, regardless of the monetary amount. Gifts at any level may be allocated anywhere there is an opportunity to give at Emory.

Donors qualify for membership on their second consecutive year of giving, and they remain members of this elite giving society as long as they make at least one gift each fiscal year. For each fifth year of giving, members receive a small token of appreciation.

- Founded in 1855 as the first children's hospital in the United States, **The Children's Hospital of Philadelphia** (CHOP) depends on its consecutive-year donors to continue its mission of providing hope and health to every child. CHOP recognizes donor loyalty with exclusive recognition societies at every giving level. These society memberships include exclusive invitations to special luncheons, receptions and events, along with named or anonymous acknowledgment in the annual giving report and on the hospital's donor wall.

One of CHOP's exclusive donor societies, The 1855 Society, honors loyal supporters of Children's Hospital who have given to CHOP each year for a decade or more. It consists of four tiers of consecutive annual giving at any level: across 10 years, 15 years, 20 years, and 25 years or more. Each November, members are invited to an annual reception celebrating the anniversary of the hospital's founding on Thanksgiving Day in 1855.

Sources: Kim Julian, Executive Director, Office of Annual Giving, Emory University, Atlanta, GA. Phone (404) 727-8782. E-mail: kjulian@emory.edu. Website: <http://annualgiving.emory.edu/about/consecutive-giving.php>

Mark Turbiville, Assistant Vice President, Communications and Donor Relations, The Children's Hospital of Philadelphia Foundation, Philadelphia, PA. Phone (267) 426-6500. E-mail: giving@email.chop.edu. Website: http://giving.chop.edu/site/PageNavigator/Gift_of_Childhood/Ways_to_Give/Giving_Society/1855_society.html

CAMPAIGN IDEAS

Make the Most of Anniversary Milestones

Is your organization about to celebrate an anniversary? Congratulations! Now get to work on ways to tie your fundraising efforts to the anniversary year.

Here are some suggestions:

- Launch a capital or endowment campaign that uses your organization's anniversary year as its dollar goal (e.g., 25-year anniversary: \$25 million).
- Ask for donation amounts that coincide with your anniversary year (e.g., \$25; \$250; \$2,500; \$25,000).
- Develop an anniversary-year fundraising appeal that solicits, for example, 25 gifts of \$25,000; 250 gifts of \$2,500; or 2,500 gifts of \$25.
- Launch a new annual giving club for donors who pledge to make generous gifts (e.g., \$2,500; \$25,000) to your annual fund campaign over a five-year period.
- Celebrate donors who have been a part of your organization since its inception or for a certain length of time, such as 10 years, with a letter of recognition and invitation to make a special anniversary gift.

Show Businesses How to ‘Plug In’

By Thomas Schroeder

Wouldn't it be great if local and regional industry leaders could “plug in” to the business department of your college or university and receive straightforward insight and access to the next generation of managers and leaders?

Calvin College (Grand Rapids, MI) has created a program to do just that: connect business leaders to their curriculum and students. “We know and understand that the next generation of great leaders is, at this very moment, enrolled in exceptional business programs like ours at Calvin College,” says Ken Erffmeyer, vice president of advancement.

Calvin College developed “Business Drive” as an opportunity to provide local and national businesses a chance to support the next generation of Christian business leaders. “Our students are extremely well-educated, as well as very ethical and filled with compassion and empathy,” says Erffmeyer. “(We said) let's provide the business community the opportunity to support their development and also cultivate the next generation of leaders.”

Tom Nobel, CEO of Leisure Living Management, Inc., strongly endorses the initiative. “Our company supports the Business Drive program at Calvin because it is a great resource for businesses. Their business graduates are excellent and will be the future leaders in our community.”

Business Drive gifts offer direct and immediate support to Calvin College and its students through programs such as the following:

- **Internships.** The internship program provides a flexible and cost-effective workforce and does not require a long-term commitment. More than 85 percent of Calvin College students complete an internship or practicum prior to graduation.
- **Study-abroad opportunities.** The international program offers students the opportunity to learn and flourish in divergent cultures and business situations. Today's global marketplace requires exceptional skills and attributes to communicate, negotiate and succeed in a multicultural business environment.
- **Financial aid.** One of the many financial aid options for businesses to contribute to include scholarship opportunities, which provide a direct linkage between the business and student and often create lasting relationships. Scholarship endowments make it possible for generations of young business leaders to gain access to a core educational foundation.
- **Faculty research.** Many businesses support the college by funding faculty research that directly impacts their field and provides cutting-edge insight and knowledge.

Another highly effective and innovative way industry and the business community supports Calvin College is through Calvin Action Projects. Calvin Action Projects are hands-on, experiential opportunities that allow students to perform as consultants on realistic business situations and problems. These challenges or opportunities can be based in core curriculum areas of accounting, finance, marketing or human resources.

“The real-world opportunities provided for our students are extremely instrumental in preparing the young women and men for the business world,” says Erffmeyer. “Our students get hands-on experience in critical thinking, problem solving and ethics, and they are prepared for their first day of challenging and life-changing work.” (For more details see www.calvin.edu/support/business.)

Source: Ken Erffmeyer, Vice President of Advancement, Calvin College, Grand Rapids, MI. Phone (616) 526-6097. E-mail: kde2@calvin.edu. Website: www.calvin.edu

Question regarding your subscription? Contact jbsubs@wiley.com.

Are You Skilled at Floating?

When you're involved in hosting an event, how consciously do you attempt to visit with as many attendees as possible? It's important to make contact with your guests and help them have a pleasant experience. This cultivation process may also allow you to uncover information through individual chats that may give clues to future solicitation efforts.

Here are three standards to use for skilled floating:

1. Limit your time with any one guest; politely excuse yourself with a statement such as, “Excuse me, I see someone with whom I need to touch base.”
2. Have a menu of questions from which to draw — those that may reveal more than small talk — as you chat with individuals.
3. When standing with several individuals, be sure your conversation includes and involves everyone present.

Understand Bequest Types

Even if you're not a planned giving expert, it's important that you know the various types of bequests donors can make to your charity, especially since the bequest is, by far, the most popular type of planned gift made.

Here's the lineup:

Specific bequest — the donor bequeaths a certain amount of cash or specific assets to the charity.

Residual bequest — bequest of all or a portion of the remainder or residue of a donor's estate after specific and other bequests have been distributed.

Percentage bequest — the charity receives a certain percentage of the donor's estate or of another asset.

Contingent bequest — the charity receives the estate if others named in the will are not living at the time of the donor's death. Example: “I give all the rest, residue and remainder of my real and personal estate to my husband, (name), if he survives me; if not, then 50 percent in equal shares to my children who survive me and 50 percent to (name of charity).”

You Just Never Know

There was this small but deserving agency with only one development officer who did everything from answering the phone to filing to writing letters and stuffing envelopes. She did it all. But even at that she made time to regularly get out and see people and tell her agency's story.

Months went by and one year faded into the next. And all that time, the development officer kept doing her thing.

In her 21st year with the agency, she was flabbergasted when she received a letter from an attorney indicating her agency was the recipient of a \$4 million bequest! You just never know.

Keep Your CEO Focused On Your Operational Plan

It's not uncommon for a nonprofit's president or executive director to come up with all sorts of projects for the development office. That's why it's important to have a yearlong operational plan with clearly identified goals and action plans. It's equally important, however, to share that plan — and what's happened to date — with your CEO throughout the year to help keep him/her "on the same page."

Budget Deals Worth Betting On

Is your development budget strapped for resources? Are you confident you could raise more if only you had another staff person or could afford more mailings or hold another special event?

If you believe there's a direct correlation between your budget and ability to raise additional funds, why not offer your supervisor or CEO a deal worth betting on? Here are some examples:

"If I increase giving by X percent, can I get my budget increased by that same amount?"

"If I can double the increase in support we experienced last year, can I keep half of that increase for the development office budget?"

"If I can land one new five-figure gift this year, can I have my budget increased by just 5 percent?"

Take a stand. Put yourself on the line. The deal will help you rise to the occasion.

Techniques for Researching Individuals

By Thomas Schroeder

According to Michael Quevli, consultant with Blackbaud, an international nonprofit software and services company (Charleston, SC), the one question all nonprofits should focus on in their major gift and planned giving fundraising efforts is: How can we utilize prospect research tools to reach our maximum fundraising potential?

"Wealth screening and analytics are very helpful to organizations in determining the indicators that touch on capacity in giving," says Quevli. He notes that, in the nonprofit world, where budgeting is critical to success, money is not spent unless it has significant return on investment. Quevli offers the following reasons why prospect research for giving is important:

- Once a program is established, nonprofits can expect a cost of 3 to 5 cents for every dollar raised. This low cost ratio is crucial not just to the organization but also to donors who want their gifts to make a real difference and not be spent on additional fundraising efforts.
- Some nonprofit organizations realize up to 25 percent of their annual revenue from planned gifts.
- Historically, planned gifts increase 4.5 to 5 percent per year, even in recessions, while other sources of revenue, such as government grants and contracts, retract in times of economic struggle.

"The three most popular planned gift types are bequests, charitable gift annuities and charitable remainder trusts," says Quevli. "And it is not necessary to be an expert in gift planning to grasp the vital role research can play in building a successful program."

Quevli notes as few as 15 donors can collectively provide \$1 million in mission funding for an organization if they each make an average-sized gift, which in the United States is \$35,000 to \$70,000 for a bequest and \$60,000 for an annuity.

Nine out of 10 planned gifts will be charitable bequests, according to Quevli's research, and bequests are provisions in a will for passing money to a charitable organization upon death. The hallmark characteristic of these donors is loyalty, and there is a positive correlation between income, home value and legacy giving.

WORTH CONSIDERING

Try a Collaborative Approach to Foundation Funding

It can be close to impossible for smaller and/or rural charities to land a foundation grant. But if you can partner with other area nonprofits and make a legitimate case for support, you just might capture the attention of a foundation enough to secure a grant.

Many foundations are drawn to efforts that demonstrate collaboration and go beyond a charity's self-interests. Such proposals reveal a degree of planning on the part of participating nonprofits that attracts foundations' attention.

Such a coordinated effort to address a particular challenge is usually the result of one nonprofit spearheading a series of brainstorming meetings with other area charities. The organizations need not be similar, but there must be a common solution to an issue facing each of the participating agencies.

Take the initiative to assemble some of your community's nonprofit organizations and explore what common issues might be addressed through the realization of a foundation grant.

Produce a draft proposal, meet again to review it and make changes, then make your collective approach for support.

Quevli offers the following additional characteristics of strong prospects:

- Established home ownership with the home value in high to mid-level range.
- Children in college or evidence of education-related debt.
- Charitable gifts to other organizations at similar levels.
- Other types of loyalty indicators, such as club memberships, event ticket buying history, etc.

“Prospects who have large estates, closely held businesses and vacation homes and, through interviewing, appear to be philanthropic but have little or no evidence of higher-level charitable giving to your organization or others are classic gift prospects,” says Quevli.

He suggests the following steps in cultivating and soliciting potential donors:

1. Form a list from the donor base and prospects list that includes annual givers along with members, patrons, major donors, leaders, committee members, volunteers, recipients of service, alumni, friends, staff and/or faculty.
2. Prioritize the list to create a select group for personal contact.
3. Group together prospects who have made more than a single gift to the organization.
4. Add the criteria that one of the gifts was made in the past three years.
5. Apply wealth/asset screening and prospect research techniques to reduce the list to a minimum of 100.
6. Focus on an average of one prospect per week per team member. A team of three, for example, can handle 100 prospects in less than nine months.

“Millions of dollars of future funding are waiting to be designated for the organizations that dedicate time and resources to prospect research and legacy giving activities,” notes Quevli.

Source: Michael Quevli, Consultant, Blackbaud, Charleston, SC. Phone (480) 446-3777. E-mail: Michael.Quevli@blackbaud.com. Website: www.blackbaud.com

LIST MANAGEMENT

Build Your Mailing List With Thought

To add quality names to your mailing list, periodically put out an invitation to current contributors and employees, inviting them to submit names of friends, relatives and colleagues who, in their opinions, should be added to your mailing list.

You can accomplish this in any number of ways, such as:

1. Include space on pledge forms that asks for mailing list referrals.
2. Include a standard invite at the bottom of all e-mails: “If you or someone you know would like to be informed of XYZ’s news and events, please let us know, and we’ll add the contact information to our mailing list.”
3. Whenever you send a gift acknowledgment letter, ask donors for names of those who might enjoy receiving your organization’s newsletter or magazine.
4. Be sure not to miss putting the names of anyone who has anything to do with your organization on your list — persons who attend your events, vendors, those you serve and members of their family, etc.

Meetings Do Serve a Purpose

Meetings can be a headache. They can divert attention away from making calls on prospects and donors. They can result in busy work if meeting outcomes have not been justified. That being said, however, meetings can also be a very productive way of collectively tackling a problem or strategizing. They keep everyone focused on what matters most — or at least that’s what meetings should accomplish.

You, no doubt, hold regular staff meetings to discuss business at hand. And if they are run like most staff meetings, they tend to become routine. There are times, however, when you may want to call special meetings to focus your discussion more narrowly. The result of such meetings can prove very useful at times.

Here are some examples of meetings with a single focus:

- To develop a yearly operational plan — complete with job descriptions, goals, quantifiable objectives, actions and master calendar.
- To discuss cultivation/solicitation strategies for top prospects.
- To compare current annual giving with that of a year ago and take steps to adjust fundraising plans accordingly.
- To discuss a particular printed piece of communications: determine content, review a draft as a group, etc.
- To rate and screen prospects.
- To identify sybunts, lybunts and/or nondonors and assign calls.
- To coordinate or fine-tune a particular fundraising effort — direct mail, phonathon or special event, for example.

Don’t avoid having a focused meeting just because they are sometimes frowned upon. Some collective discussion may be in order.

What’s Your Average Intake?

Do you know your average weekly or monthly gift revenue intake? Use those historical figures to calculate what’s necessary to make current year goals.

Share Fund Development Tools With Your Volunteers

Webinars and other online tools are helping volunteers at Smith College (Northampton, MA) raise money for its annual fund.

Smith's Tools for Volunteers Web page (www.smith.edu/giving/fund_tools.php) contains multiple links for volunteers that include webinars, promotional flyers, solicitation tips and written communication samples.

Webinars have been the most effective tool for Smith's 300 volunteers, according to Allison Gomes, assistant director for the Smith Fund's volunteer programs, because they generate participation and interaction between staff and volunteers.

These live, online sessions, which take place bimonthly, address different topics but focus on volunteer training. A particularly helpful aspect, Gomes says, is they provide volunteers with current information about what's going on at Smith that they can use when talking to prospective donors.

"It gives our volunteers ways they can make Smith relevant when they're asking for money," Gomes says. "One of the common things we hear is, 'I don't even know what Smith is like today.'"

Each webinar lasts about an hour and includes presentations from Gomes, the director and the lead volunteer. They update important facts and figures, such as fundraising totals and targets, and present action plans to help volunteers achieve goals. For visuals, the staff uses PowerPoint slides uploaded via Adobe Connect.

Gomes announces each webinar in her monthly volunteers' newsletter and via three e-mail blasts. Average attendance runs at about 40 and peaks at 60 for the most popular webinars — sessions kicking off new fiscal years and on how to make asks. Friday at noon has been the most popular time slot, while a webinar at 8 p.m. on a weekday flopped, Gomes says. The site archives the webinars for future reference.

One of the best aspects of the webinars, Gomes says, is the interaction they promote between staff and volunteers. Volunteers may post written questions, which Gomes reads aloud to the director for answers. The staff also sometimes queries attendees, such as asking them why they give to the Smith Fund, and gains valuable feedback.

Other popular tools include a Smith Fund promotional brochure, which volunteers can download, print and take on visits, and a fact sheet that gives volunteers current facts and figures about the annual fund to help convince alumnae to donate.

Source: Allison Gomes, Assistant Director for Volunteer Programs, Smith Fund, Office of Development, Smith College, Northampton, MA. Phone (413) 585-2661. E-mail: agomes@smith.edu. Website: www.smith.edu

Set Meaningful Goals for Each Class

Colleges and universities are in pursuit of alumni support of all kinds, especially financial support. Lafayette College, (Easton, PA) has created a unique approach by teaming with alumni class reunions (<http://reunion-lafayette.edu/giving>) to raise funds and strengthen connections.

"Each of our graduating classes establishes a set of fundraising goals that include participation level, total amount to be raised and specific projects determined by the class members," says Julie Nolan, assistant director of alumni relations. "The classes also elect a fund manager and committee to recruit donation pledges and build momentum as they approach the next reunion."

Here Nolan provides perspective and insight regarding the alumni reunion giving initiative at Lafayette College:

How does the effort operate?

"Each of the classes appoints its leadership committee, establishes very specific fundraising goals and determines milestones to build momentum and create interest. For example, the class of 1964 established goals of \$115,850 for the annual fund and \$300,000 for the building of a gateway at High and McCartney Streets on the campus. The class of 1974, by contrast, set goals of \$200,000 for the annual fund and a 57 percent participation level."

Is the initiative managed through volunteer involvement by alumni?

"Certainly the goals for each reunion are guided and led by alumni volunteers, but each class reunion initiative is also assigned a staff member to provide administrative functions, including follow-up contact and documentation of milestones as the goals are achieved."

Are the class reunions competitive with each other?

"I think there is a friendly air of competition between the class reunions; however, we need to understand the wide divergence in giving potential between the class of 2009 and, for instance, the class of 1974. The class of 2009 set goals of 41 percent participation and \$10,000 donated to the annual fund. The class of 1974 set goals of 51 percent participation and \$200,000 donated to the annual fund. The many years of generating income and reinforcing connections with the college leads to much stronger donor potential."

Does the reunion fundraising effort benefit the college in other ways?

"We have nearly 30,000 alumni, and the five-year reunions are a great way to establish or re-establish connections with our institution and create opportunities for lifelong giving and other support. Our alumni community stays connected through our regional chapters, various volunteer service and leadership roles and our online alumni network."

Source: Julianne Nolan, Assistant Director of Alumni Relations, Lafayette College, Easton, PA. Phone (610) 330-5040. E-mail: nolan@lafayette.edu. Website: www.lafayette.edu

Keep the Challenger Up-to-Date On Matching Gift Progress

Whenever you're fortunate enough to have a donor put up sufficient funds to establish a challenge gift, it's important to keep the donor informed throughout the challenge period. In addition to just being a good stewardship practice, doing so increases the odds of the challenger adding to his/her pledge or repeating it sometime.

Whether your periodic updates include correspondence, phone calls, personal visits or a combination of each, provide an ongoing printed report — such as the example below — that the challenger can use to get a quick read on the status of matching gifts. The frequency of updates should be based on the duration of the challenge period. If, for instance, the challenge covers a three-year period, quarterly updates might be appropriate. You may also choose to let the challenger decide how often he/she would like to review updates, and issue them accordingly.

Challenge Gift Update PREPARED ESPECIALLY FOR ALFRED M. WILSON

January 4, 2015

Challenge Start Date January 1, 2014 End Date December 31, 2016

Challenge Rules: Dollar-for-dollar match up to \$1 million throughout the three-year period. Any gift directed to this project will be counted as a matching gift.

Use of Challenger's Gift: To establish The Wilson Leadership Symposium, an annual event that brings together some of America's top entrepreneurs who will publicly address key issues that impact the free enterprise system.

Use of Matching Gifts: All matching gifts will be directed to The Wilson Leadership Symposium Endowed Fund.

	Year 1	Year 2	Year 3
	Amount/No. Donors	Amount/No. Donors	Amount/No. Donors
April	\$14,000 / 16		
July	\$48,000 / 37		
October	\$66,500 / 44		
December	\$89,000 / 43		
Total	\$217,500 / 140		

PLANNING PROCEDURES

How to Reach an Annual Fund Goal Increase of 10 Percent

The Challenge: As challenging as it may be to achieve, you've just learned that your department is expected to generate 10 percent more in unrestricted gifts as part of next year's development goal. How do you set out to reach — even surpass — that goal?

One Solution: Focus your efforts on generating sufficient \$1,000-plus contributions to make up the 10 percent increase.

Action Plan

1. First, figure the dollar amount required in additional funds based on a 10 percent increase over last year's gift totals (\$500,000 raised last year would require \$50,000 more in gift revenue).
2. Then, assuming you will generate the \$500,000 repeating everything you did last year, determine the number of \$1,000 gifts required to generate an additional \$50,000 (\$50,000 divided by \$1,000 equals 50 donors of \$1,000 or more).
3. Begin formulating strategies aimed at generating 50 new \$1,000-and-above contributors for the upcoming fiscal year. Such strategies might include:
 - Charge your development committee — made up of volunteers and/or board members — to be responsible for soliciting 10 new gifts of \$1,000 or more.
 - Charge the development personnel to cumulatively raise 20 or more new \$1,000-plus contributors through face-to-face calls.
 - Coordinate a program that encourages existing \$1,000 donors to identify and recruit additional "members" at that level — 10-member goal.
 - Carry out a targeted direct mail appeal that invites recipients to join your \$1,000-and-above annual gift society — five \$1,000-plus gifts as a goal.
 - Identify a specified number of nondonor corporations/foundations and craft individual proposals that invite grants of \$1,000 or more.
 - Create a list of sponsorship opportunities of \$1,000 or more and invite nondonor businesses to underwrite the project of their choice for one year.
 - Invite all of last year's \$500 to \$999 donors — via face-to-face calls, direct mail or telesolicitation — to increase their giving to the \$1,000-plus level or beyond.

Become Proficient At Multitasking

Development requires good "juggling" skills. This multitasking success is based, in part, on the ability to compartmentalize both prospects and strategies — to focus on one job without ignoring other jobs.

To hone your multitasking skills, create a list of every possible task that requires focused attention. By doing so, you can visualize them as a group and separately to determine the time and details required to accomplish each.

Here are a few examples of strategies that may be included on your multitask list:

- Prospect groups that merit face-to-face visits.
- Targeted groups who will be the recipients of special direct mail appeals.
- Prospects to be included in telesolicitation efforts.
- Receptions to be held in key geographic locations.
- Special fundraising events.

This exercise will also be useful when it comes time to develop your yearly operational plan complete with goals, quantifiable objectives, action plans and calendar.

Offer a Workshop Series Addressing Estate Planning Topics

A series of free money management and estate planning workshops requires an investment of staff time but pays off in reaching out to the community and generating gifts, according to Carolyn Swanson, director of planned estate giving, St. Jude Medical Center (Fullerton, CA).

Seven years ago, the center's foundation began working with Peter C. Kote, a financial planner, to offer the free eight-week courses twice a year. Each one-and-a-half-hour session covers topics such as basic and advanced estate planning and IRAs. St. Jude and other nonprofits pay Kote's nonprofit organization, FeelInControl.org, as sponsors of the free seminars. In return, the nonprofits can give presentations at each class and hand out literature. The program does not allow solicitations for charitable donations, however, or commercial sponsorships or sales of financial products.

In the 20 years he's been presenting the workshops, Kote believes they've generated about \$100 million in planned gifts for nonprofits. Depending on location, class attendance can range from 10 to 150.

Swanson says although Kote handles most of the operation, lining up speakers and giving lectures, the workshops can be time-consuming, since she attends each one.

"What I find valuable about it," she says, "is people who come to them are people whom I wouldn't otherwise necessarily meet."

Meeting with attendees weekly in a no-pressure environment helps build friendship and trust, says Kote, which has paid off in the long run. Although Swanson doesn't have a figure for the dollar amount of gifts the workshops have raised for St. Jude, it's directly responsible for at least three gift annuities. After learning of the tax advantages of giving from their IRAs, many attendees have also decided to make gifts from their retirement accounts. At least three couples opted to give their entire estates to St. Jude. Two of those couples were familiar to St. Jude's development staff but decided to make the gifts during the workshops.

Besides speaking at meetings along with Kote, Swanson also brings in staff members to discuss issues such as philanthropy's benefits for the hospital, volunteering and the tax advantages of charitable giving. As a speaker, Kote increases the popularity of the workshops because he has a talent for making what could be a dull subject "fun and interesting," she adds.

Sources: Carolyn Swanson, Director, Planned Estate Giving, St. Jude Medical Center, Fullerton, CA. Phone (714) 992-3033. E-mail: Carolyn.Swanson@stjoe.org. Website: www.gfipln.org/Article.do?orgId=336&articleId=12458

Peter C. Kote, Founder, Professional Fiduciary Services, Laguna Hills, CA. Phone (949) 600-8625. E-mail: pkote@cox.net. Websites: www.trusteepro.com and www.FeelInControl.org

Help Your Donors 'Build' a Gift

Is your college, university or nonprofit searching for an innovative way to simplify and boost online giving? You may want to check out the program initiated by the Purdue University Research Foundation (West Lafayette, IN; <https://securelb.imodules.com/s/1461/research/hybrid/index.aspx?sid=1461&gid=1010&pgid=1754&cid=4045>).

The program, Let's Grant Opportunities Together, offers donors a simple step-by-step process for selecting a gift amount, directing the gift to the Purdue Scholarship Fund, the Purdue Moves campaign or other university gift funds and determining if the gift is a one-time donation, a recurring payment or a longer-term sustaining donation.

"We've had great success with the Let's Grant Opportunities Together program," says Christine Armes, executive manager and vice president for development for the Purdue Research Foundation. "The simplicity and user-friendly aspects of the program have made its use very popular among both our long-term loyal donors and newer supporters."

Here Armes shares some details about the program:

What sparked the development of the online giving program?

"We found by researching our existing donor base, and also many potential donors from our alumni and others, that many potential supporters had either never been asked or simply did not know how to go about making a donation. With that information in mind, we were interested in building an online program that was simple and easy to use and also provided donors with many options for the use of their gifts."

Has the program increased support?

"The online giving program has been operational for nearly two years, and in that time we've experienced increases in the number of gifts, the total dollars given and, most significantly, the number of new donors. Our new donors, predominantly young alumni, have found the program to be very simple, and it not time-consuming. We've received several comments, such as, 'I didn't know it was so easy to make a donation.'"

How does the program work?

"A donor simply logs onto the site, and the first step is to select a donation amount, from \$25 to \$1,000, or any other amount. The donor then determines how the gift is to be used, and the Purdue Scholarship Fund, for example, is matched dollar for dollar by the university. The next step involves determining if the gift is one-time only or if the donor is interested in a sustaining contribution, and finally contact and payment information is secured from the donor.

Would you recommend a similar initiative for other institutions?

"Absolutely. I think anything we can do as gift officers to simplify the giving process and encourage new donors through technology will reap great benefits for us in the long run."

Source: Christine Armes, Executive Manager and Vice President for Development, Purdue Research Foundation, West Lafayette, IN. Phone (765) 496-2144. E-mail: ceames@prf.org. Website: www.purdue.edu