

From Suspect to Prospect to Donor to Partner / Friend

Prepared for

The CALPA Conference

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NETZEL ASSOCIATES, INC.

Turning Dreams into Reality®



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- In 2006, more than \$295 billion was contributed to all charitable causes throughout the United States. The sources of this remarkable giving record may prove surprising to you:
 - 4.3% – Corporations / Businesses
 - 12.4% – Foundations
 - 7.7% – Individuals (through bequests)
 - 75.6% – Individuals (living)

Source: *Giving USA*

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■ Why People Give

- Belief in the mission
- Personal involvement
- Peer pressure / Respect for one asking
- Recognition
- Community improvement
- Tax advantage
- Because someone asked!

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■ Key Principals of Fundraising

- Fund raising is a long-term endeavor
- There is a direct correlation between the size of a donor's gift and the method used to solicit it
- There is a direct correlation between the size of a donor's gift and the amount of overall funds required
- Volunteers are more effective fundraisers than are staff or consultants

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■ Key Principles

- Fundraising is an earned privilege not a right
 - ◆ Response to compelling needs
 - ◆ Responsible stewardship/management
 - ◆ Vision that inspires and captures the imagination

“ If we are going to be worthy of support, we have to make a difference in people’s lives.”

**Pamela Rosenberg
General Director
San Francisco Opera**

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■ Key Principles

➤ Money follows involvement

- ◆ Board-level policy making
- ◆ Program delivery
- ◆ Advisory role
- ◆ Planning

➤ People give to people

- ◆ Building relationships
- ◆ Visibility of key leaders

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■ 9 Steps to the Evolution of a Prospect

- Identify — “Suspects”
- Research — Determine if a “Qualified Prospect”
CIA
- Inform — Build general awareness of organization
- Educate — Develop knowledge and understanding
- Involve — Create interest in and concern for . . .
- Commit — Establish sense of ownership
- Solicit — Ask for a significant gift (with the right team!)
- Recognize — Acknowledge gift multiple times
- Steward - Keep in contact, continue involvement

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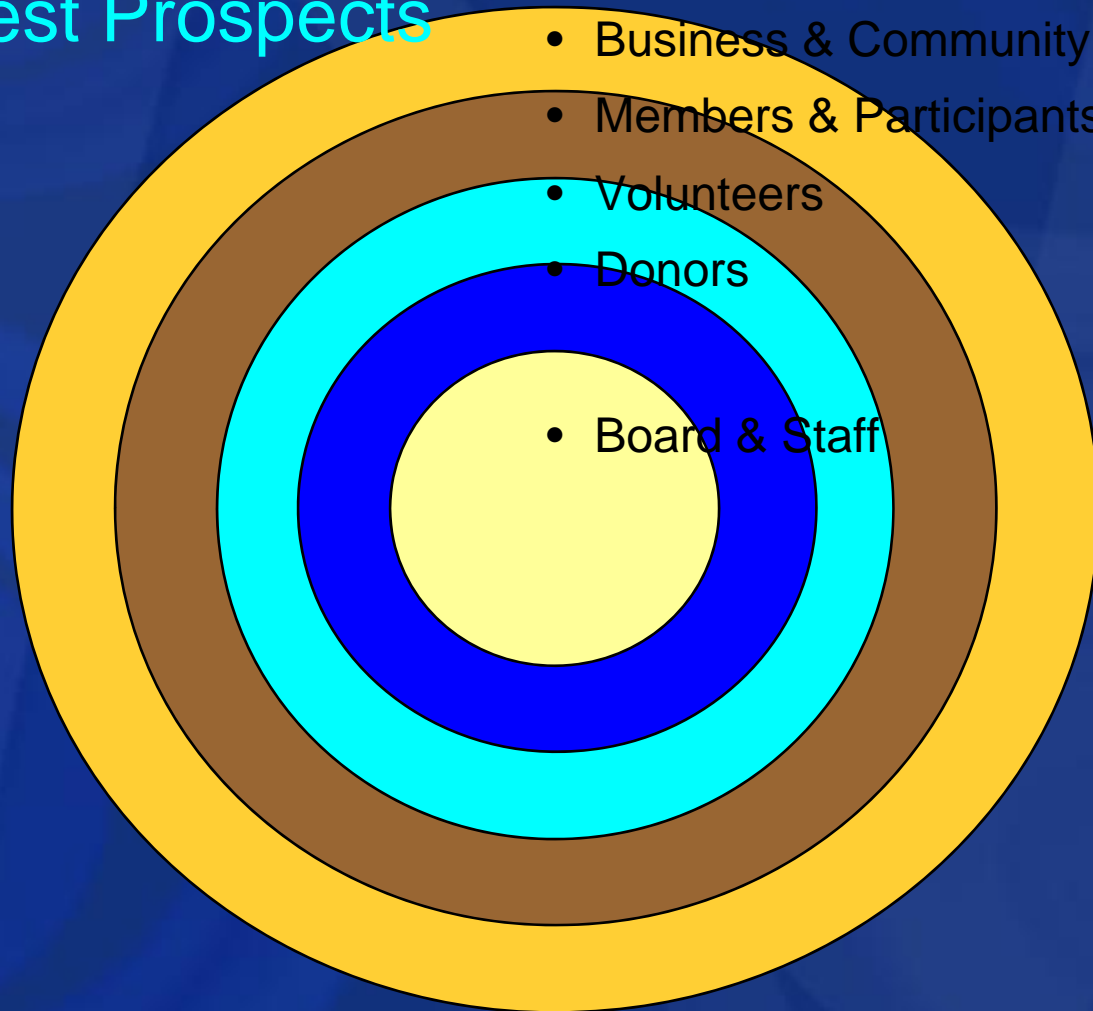
■ Cultivation

- Invite for a tour
- Host a small friend-raiser
- Invite to an event, lecture, class
- Send article of interest
- Call to thank after a gift is made

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Your Best Prospects



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Essential

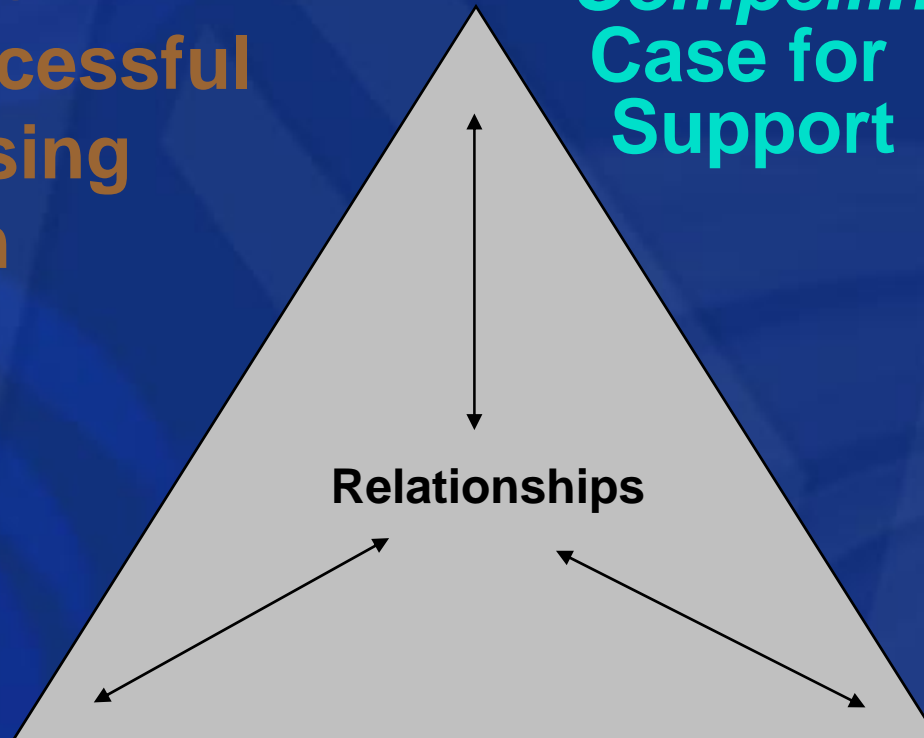
Elements

of a Successful

Fundraising

Program

***Compelling
Case for
Support***



***Cultivated Field of
Donors***

***Motivated Volunteer
Leadership***

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■ Keys Principles for Success

- Compelling and urgent case that answers
 - ◆ Why now
 - ◆ What will be different when funded
 - ◆ Survival is not a case for fundraising
- Challenging goal
 - ◆ Balance inspiration with attainability
- 100% leadership commitment
 - ◆ If you don't give, why should others

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■ Key Principals for Success

- Make your own gift first
 - ◆ “Stretch” giving boosts confidence to invite others
- Make requests face-to-face, in pairs
 - ◆ Communicate passion and express respect
 - ◆ Provide an opportunity to make a difference, be part of something important, feel the joy of giving
- Ask for a specific amount
 - ◆ Is this a \$100, \$1,000, or \$10,000 request?
 - ◆ Will you consider...

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■ **Keys Principles for Success**

- Solid program and operational foundation
- Smart planning and design
- Targeted strategies to nurture major donor prospects
- Courageous staff and volunteer leadership
- Adhering to proven principles

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- **“While the difficult takes time, the impossible just takes a little longer.”**
Anonymous
- **“To be fully alive is to work for the common good.”** Corita
- **“You gotta try your luck at least once a day, because you could be going around lucky all day and not even know it.”**
Jimmy Dean