

Fundraising Vehicles for Child Advocacy Centers

Gene Klein, LCSW
Executive Director
Amy Chisholm
Development Director
Project Harmony

Fundraising Vehicles Goals for Today

- ▶ Understand the process of fundraising
- ▶ Expand your view of fundraising
- ▶ To generate excitement about your case
- ▶ To select the right vehicle for your needs

Fundraising Vehicles

Social Work  Sales

Or is it ???

CAC Readiness

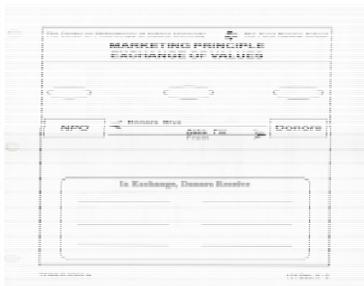
- ▶ Marketing and Fundraising
 - What was your training in this field?
 - What is your comfort level of asking for \$\$\$?

- Concepts:
 - The Feedback System for profit
 - Goods exchanged for \$\$--there is a visible product you are buying which will make you "better, feel good, ect"
 - Non profit
 - Two customers: client and donor

CAC Readiness

- ▶ Marketing Concepts
 - The Exchange Relationship
 - Transaction—quid pro quo?
 - What does the CAC want?
 - \$\$ to fill the gaps, \$\$ to support operations, \$\$ for buildings, equipment, ect
 - What do Donors want?
 - Involvement, participation, accountability
 - What do Clients want?
 - Quality service, convenient service, outcomes

Exchange Relationship



Fundraising Vehicles

Marketing Concepts

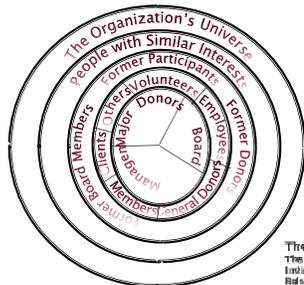
- Environmental Factors that impact Fundraising
 - Demographics: Distribution of the population by age, gender, family type, education, ect.
 - Psychographics: Attitudes, Values, Lifestyles
 - Economy, distribution of wealth
 - Government and public policy
 - Technology
 - Culture: The value of systems of living

Fundraising Vehicles

Constituencies:

- Market segmentation is necessary. The closer to the center the stronger the bond to the CAC.
- What is Market Segmentation??
 - Who are those that have interest in your CAC?
 - What groups of people care?

Constituencies People who care..



The Constituency Model
The Center on Philanthropy at
Indiana University: The Fund
Raising Institute

Fundraising Vehicles

▶ What interests donors?

- 1. Accomplishments (*What did you do with my \$\$\$*)
- 2. Recognition (*Did my support matter? Am I important?*)
- 3. Efficiency (*Can I trust you with my \$\$?*)
- 4. Opportunities (*What can you do with my \$\$?*)

The Development Process

▶ Ladder of Effectiveness (Relationship to Task)

1. Personal Face to Face contact
2. Personal Letter (on stationary)
3. Personalized Letter/email
4. Telephone/Phonathon
5. Impersonal Letter
6. Impersonal Phone/email
7. Fundraising Event
8. Door to Door
9. Media/Advertising

Fundraising Vehicles

▶ Relationship of the CAC to Constituents

- The Unresponsive CAC: does not measure needs, perceptions, satisfaction. Makes input and feedback difficult.
- The Casually responsive CAC: is interested in needs, perceptions, and preferences. Encourages feedback and input.
- The Highly responsive CAC : is keenly interested in constituents, expresses interest by creating formal systems to engage.
- The Fully responsive CAC: same as highly, but accepts constituents as voting members. They determine the course.
- Marketing the CAC is accomplished by focus on constituents needs.

Building a Constituency

- ▶ The Board of Directors
 - Tend to initially be those in the field—prosecutors, law enforcement, Child welfare, medical—ect.
 - These are very committed and strong constituents—they get something out of their involvement
- ▶ Service Leagues, Friends of the CAC, Guild
 - Interested, want to help, "outside" of the system
 - How do you engage them?
 - Importance of structure, mission, focus and role definition

Service Leagues and Friends Group

- ▶ Critical step in building that circle of influence
 - Recruitment to "the team" requires a clear definition of the team
 - Levels of structure—which fits you?
 - Articles of incorporation—clear expectations, officers, meetings, purpose
 - Loose affiliation—usually a group that gets together to plan an event—no expectations
 - Mission—why have we called them together? What is their purpose? (Go get \$\$\$?). Help them understand how their work moves the mission of the agency ahead.

Service Leagues and Friends Groups

- ▶ Focus and role
 - "Go do an event for us" vs How can we work together to fill _____ need?
 - Raising \$\$ is not the goal---filling the need is the goal
 - What they are doing this year will be directed to that need.
 - Role
 - How they handle \$\$? How they spend \$\$? What is the oversight of the CAC?
 - What is the relationship to the CAC? Liaison? Staff? You?

Fundraising Vehicles

- ▶ Components for successful fundraising
 - CASE: clear, compelling statement justifying the need
 - NEEDS: program is expressed in \$\$ terms
 - GOALS: realistic \$\$ is in relation to fundraising plan
 - PROSPECTS: potential gifts sources identified
 - LEADERSHIP: capable, dedicated volunteers
 - PUBLIC RELATIONS: CAC image is good
 - TIME and TIMING: planning time, coordination with other events
 - STAFF: availability of staff, good energy
 - BUDGET: funds needed to cover up front expenses

THE CASE

- ▶ Three CRITICAL ELEMENTS of the CASE Statement
 - Make a PROMISE
 - PROVE you have results
 - CELEBRATE the Donor

The CASE is not a
DESCRIPTION of WHAT you
do.

**The Case talks about
where you are GOING**

**The CASE is a DESCRIPTION
of what you PROMISE**

The CASE

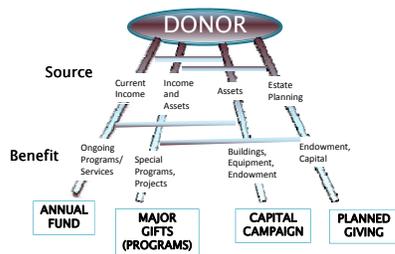
- ▶ Three critical questions
 - What are we promising?
 - To put an end child abuse...
 - Where are we going?
 - In the next year we will be focusing on.....
 - Why do we matter?
 - If children don't have a CAC to come to.....

Talking Right

- ▶ Talk as if you are telling a 6th grader your story.
- ▶ The case needs to be the BIG picture. Hold off on the jargon, (CPS, MDT, collaboration,) you are not talking to other specialists.
- ▶ Printed material should sound like someone is talking.
- ▶ 60 Second Test

4-Legged Stool of Fundraising

The Center on Philanthropy at Indiana University: The Fundraising School



Selecting the Right Vehicle at the Right Time

- ▶ Most CACs generally start out with a small grant
- ▶ Special Events tend to supplement “operating”
- ▶ We then go BACK and implement the Annual Drive or Capital

The Annual Fund Drive

- ▶ Becomes the BASE for all other Fundraising efforts
- ▶ Develops Credibility of the Organization
- ▶ Allows to Promise, Prove and Celebrate
- ▶ Focus on the constituency circle
- ▶ Establishes giving habits and patterns
- ▶ Building on each year, building into other campaigns
- ▶ GOAL IS TO EXPAND THE CONSTITUENCY

Annual Drive

- ▶ Leadership letter- recruit new leaders to “chair” the annual drive
- ▶ Use a compelling story
- ▶ ONE page-no more
 - Remember the 3 questions:
 - What are we promising?
 - Where are we going?
 - Why do we matter?
- ▶ Make the return of \$\$ very easy—give them options

The Capital Campaign

- ▶ Intensive effort designed to raise a specific sum of \$\$ to meet the CAPTIAL needs of the CAC. Building, space, remodeling, land, equipment, ect.
- ▶ As a rule this campaign requires large gifts that represent transfers from assets vs gifts from income
- ▶ Multi year pledges

Capital Campaigns

- ▶ 80% of the funding generally comes from 20% of the donors
 - Feasibility study – critical to success
 - The Donor Pyramid
 - Need a good fundraising program in place
 - Most CACs successful with small campaigns for equipment, renovations, ect
 - Move to larger campaigns when have demonstrated success

The Major Gift

- ▶ Program related gifts are very effective
- ▶ Short or long term goals with specific focus
 - Pilot with new forensic interviewer vs using LE
- ▶ Great way to “demonstrate” something new
- ▶ Special Project, new initiative – expanding medical services
- ▶ Fill the Gap from another Short Fall – United Way funding too dependent, need to diversify

Major Gift

- ▶ How do you find these people?
 - Prospecting
 - Look at other non profits in your community
 - Guidestar.org
 - National Database FOUNDATION SEARCH USA
 - Purchase mailing lists
 - Most Foundations have very clear grant guidelines with deadlines
 - Call to get information (gets you in the door and they will remember you)
 - Invite them for a tour

Major Gifts

- ▶ The grant application
 - If the prospect reads 500 words you are lucky
 - Be focused, clear and avoid jargon
 - Always include "executive summary"
 - Remember the three questions:
 - What are we promising? Where are we going? Why do we matter?
 - The rest of the grant will provide the essential detail they are looking for.
 - Be sure to include all requirements

Special Event

- ▶ Purposes
 - **Publicity** is the main function of the Special Event
 - Raise \$\$ is secondary as there are more efficient ways to do this
 - Used to reward or acknowledge donors, volunteers, partners, ect.
 - Encourage contributions, support and thank
 - TO BROADEN THE CONSTITUENCY BASE

Special Event

- ▶ Criteria for Choosing
 - Who is the Audience?
 - What is it you want from them?
 - Can you reach this group through other less intensive strategy?
 - What will attract them?
 - What will it cost? How much can you charge?

Special Event

- ▶ Questions to consider in the planning of an event
 - Is the event appropriate? Beer/Wine Tasting? Casino night?
 - Does it move your image forward?
 - Can you afford the upfront costs?
 - Are there other events that are similar? Do you want/need to be different?

Special Events

- ▶ The Events Committee
 - Two to three primary leaders with great reputations.
 - Set the overall plan, strategy, timelines budget with staff/board
 - Develop Committee Structure with leaders who report to the overall
 - Table Committee
 - Sponsors Committee
 - Ticket Sales Committee
 - PR Committee
 - Program Committee
 - Decorations Committee
 - Invitation Committee
 - Reservations Committee
 - Set-Up / Clean-Up Committee

Special Event

- ▶ Committees need very clear expectations
 - Job Descriptions for Committee Chairs
 - BUDGET/Spending Authority must be outlined
 - REPORTING – Regular scheduled meetings to report back progress or issues
 - Evaluation – post event to review issues, document success and thank

10 Steps to a Successful Event

1. Select an event that meets your CAC's Capability
2. Think the Entire Event out—create organizational chart, number of components, contingency options
3. Develop the publicity plan
4. Select and brief key players
5. Develop the Budget

10 Steps to a Successful Special Event

6. Develop a materials list
7. Plan the work and work the plan
 - Follow- up and follow -up
 - Never assume anything
 - Handle each detail completely
8. Keep key players up to date
9. Collect your \$\$ (Invoice)
10. Thank volunteers, staff and donors

Special Event Evaluation

- ▶ How much visibility?
- ▶ Net proceeds?
- ▶ Expense of time?
- ▶ Compare to other events

- ▶ Special Event is generally the most expensive fundraising vehicle

Other Vehicles

- ▶ Direct Mail
 - Primary Uses
 - Prospecting
 - Renewals
 - Special Appeals
 - Planned Giving Prospect
 - Information about Planned Giving

Other Vehicles

- ▶ Planned Giving
 - High Level of Sophistication
 - Also known as Deferred Gift
 - Allows the donor to include the CAC in their estate planning.
 - Most CAC's are not implementing a Planned Gift Program, but as the movement continues this will be essential.

Final Thoughts

- ▶ What are you Promising? Where are you going? Why does it matter?
- ▶ Celebrate the gift/donor
- ▶ Thank you's (phone call, email, letter)
 - Do what you would want
