

5 Strategies to Increase Your Annual Fund Revenue

SHIFT THE WAY YOU THINK ABOUT EVERYTHING

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SAN ANTONIO

51st INTERNATIONAL CONFERENCE
ON FUNDRAISING

M. Kent Stroman, CFRE

Institute for Conversational Fundraising

www.KentStroman.com

918-914-2811

Kent@ConversationalFundraising.com

@KentStroman

Pamela H. Witter

Houghton College

www.PamelaWitter.TateAuthor.com

716-307-4848

Advancement@Houghton.edu

Google: Pam Witter

GETTING STARTED

- Who's here?
- Who's in a campaign?
- Fundraising goals?
 - under \$1,000,000/year
 - between \$1,000,000 and \$5,000,000/year
 - between \$5,000,000 and \$10,000,000/year
 - over \$10,000,000/year

OVERVIEW

5 Strategies to Increase Your Annual Fund Revenue

KEY WORD: *Scalable*

5 STRATEGIES

#1 Show WHY

Put a name and a face on your mission

[this is about **Branding**]

5 STRATEGIES

#2 Think BIG

Define the real finish line

[this is about **Data**]

5 STRATEGIES

#3 Make a PLAN

Win the game on paper before
you go on the playing field.

[this is about **Segmentation**]

5 STRATEGIES

#4 Start EARLY

Who goes first? Time is your friend.
Give donors options.

[this is about **Relationships**]

5 STRATEGIES

#5 Ask BOLDLY

“Small dreams stir no man’s soul.”

[this is about **Best Practices**]

CASE STUDY

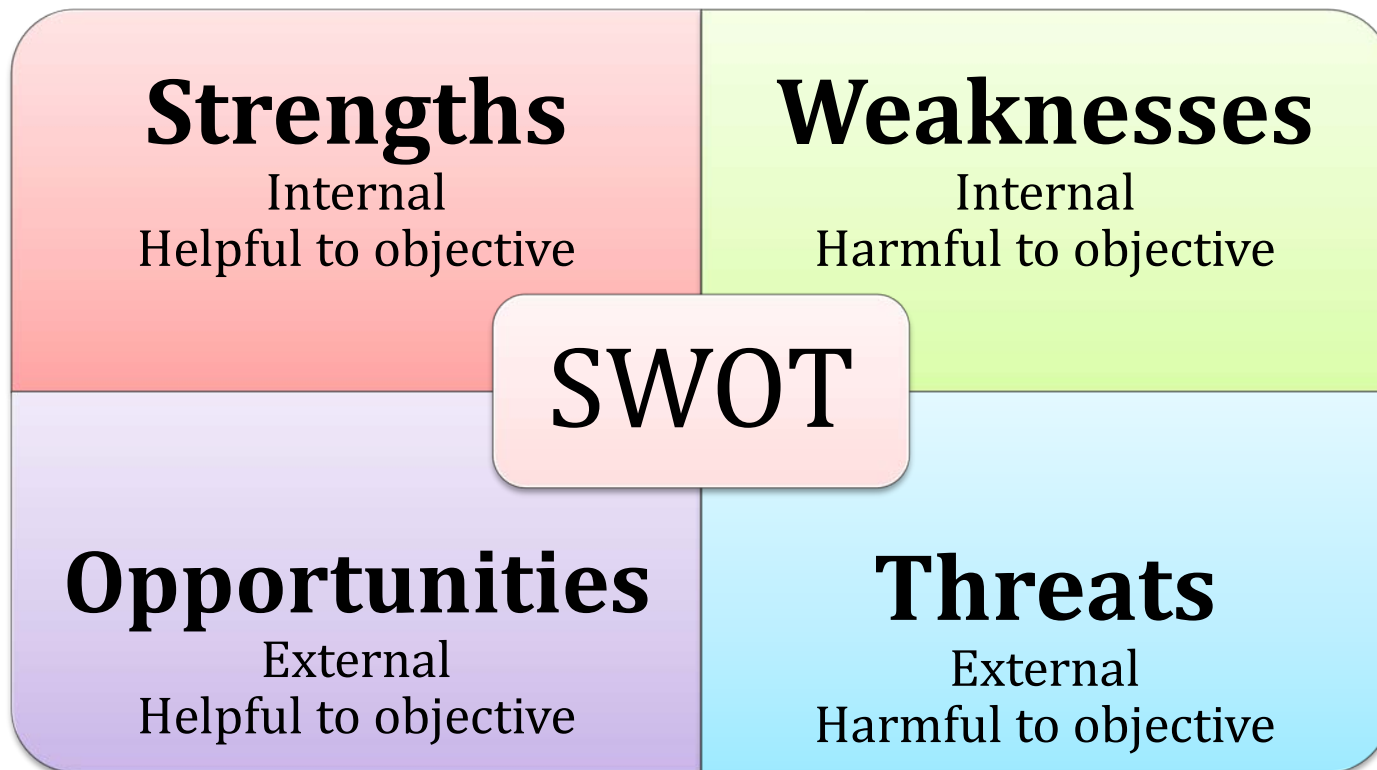
the situation ...

Our backstory...

What is yours?

ANALYZE THE CURRENT PROGRAM

Objective: *to raise “X” dollars via the annual fund next year*



BRANDING

Put a name
and a face
on your
MISSION



**YOUR
LEGACY.
THEIR
FUTURE.**

We can shape how we're remembered. Remembering the University of Wisconsin-Madison in your will is an investment in the future. For our children. For our university. For the world.

To discuss your legacy, contact Scott McKinney in the Office of Gift Planning at the University of Wisconsin Foundation at scott.mckinney@supportuw.org or 608-262-6241.

supportuw.org/gift-planning

 UNIVERSITY OF WISCONSIN
FOUNDATION

SHIFT

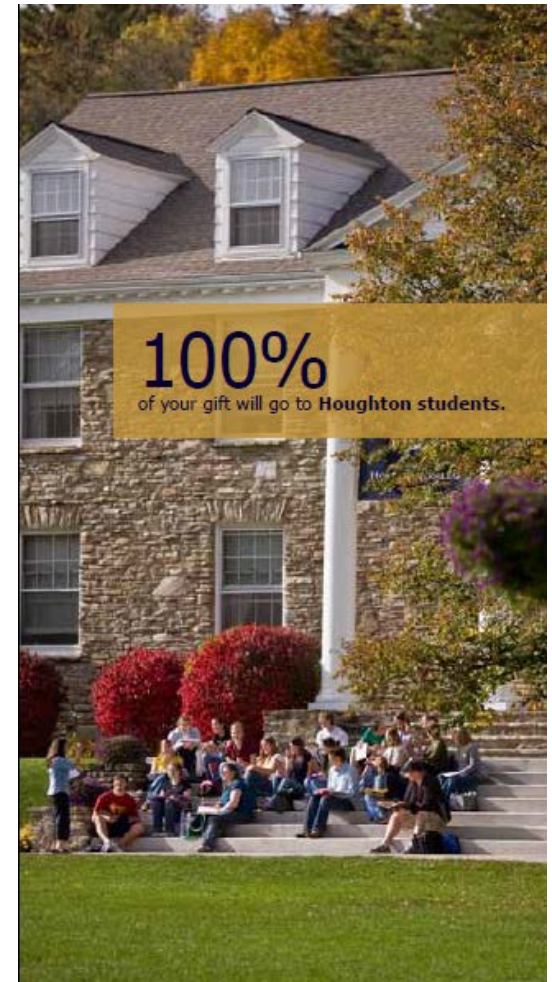
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 AFP
Association of
Fundraising Professionals

BRANDING aligns *image* with *identity*

Talk to
real people

Ask about . . .
how they
perceive us.



Why DATA matters:

What data
do
we track?

What data
could/should
we track?

Define the real
FINISH LINE

8 Essential elements of a PLAN:

8 ESSENTIAL elements

Powerful STORY (WHY?)

#

1

**a.k.a. Case
Statement**

- a. Problem
- b. Solution
- c. Payoff
- d. Risks
- e. Price

8 ESSENTIAL elements

PRICE TAG # 2
(get-real budget)

***“How much
does this cost?”***

8 ESSENTIAL elements

CALENDAR # 3

“What is your timeline?”

What are the trigger points?

8 ESSENTIAL elements

Scale of
Giving

4

“What will it take?”

Scale of Gifts

How many gifts?

How big?

<i>Leadership Gifts</i>			
1 gift of	\$ 15,000	for a total of	\$ 15,000
1 gift of	\$ 10,000	for a total of	\$ 10,000
3 gifts of	\$ 5,000	for a total of	\$ 15,000
<u>6</u> gifts of	\$ 2,500	for a total of	<u>\$ 15,000</u>
11 gifts		totaling	\$ 55,000
<i>Major Gifts</i>			
12 gifts of	\$ 1,000	for a total of	\$ 12,000
18 gifts of	\$ 500	for a total of	\$ 9,000
<u>36</u> gifts of	\$ 250	for a total of	<u>\$ 9,000</u>
66 gifts		totaling	\$ 30,000
<i>General Gifts</i>			
72 gifts of	\$ 100	for a total of	\$ 7,200
84 gifts of	\$ 50	for a total of	\$ 4,200
106 gifts of	\$ 25	for a total of	\$ 2,650
<u>106</u> gifts of	<\$ 25	for a total of	<u>\$ 950</u>
<u>368</u> gifts		totaling	<u>\$ 15,000</u>
445 Gifts		Totaling	\$100,000

8 ESSENTIAL elements

CHALLENGE[#] 5
(bona fide)

adds external urgency

8 ESSENTIAL elements

Collateral
materials

6

**Getting on the
same page**

8 ESSENTIAL elements

Accountability # 7
for RESULTS!

**A reliable means
of tracking**

8 ESSENTIAL elements

PROSPECT
list (WHO?)

People: Volunteers
Donors
Employees
Influencers

8

recruit
them

SEGMENTATION

Speaking directly to the donor:

- Should the message to a parent of a current student be any different than a message to an alumnus?



Your Secret Weapon:

RELATIONSHIPS!

- Who Who do you need to meet?
- How How will you encounter them?
- What What will you ask?
- When When will you take the first step?

TIP Preparation is the path to success.

Preparation

“ He dug his well
before he needed water.”

-Jim Dornan

WRAP UP

Take an Educational Journey...

People to see:

Places to go:

Questions to ASK:

IN CLOSING

There simply is no substitute for an
'ADVICE VISIT.'

You can DO this!

Thank you

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