

5 Strategies to Increase Your Annual Fund Revenue

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Presented by:

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5 Strategies to Increase Your Annual Fund Revenue

Overview: Success in reaching annual fund goals is essential for any charitable organization. What do you do when there is a long history of falling short of the goal? Today's session features such a real-life scenario that was overcome with a five-fold strategy that can be implemented by any fundraising team. Embedded within the strategies you will find:

- Branding
- Data Utilization
- Segmentation
- Relationship Building
- Best Practices

Our practical, hands-on approach equips fundraisers to elevate their results by providing staff and volunteers with successful, proven cultivation and solicitation skills.

Content: Today's session features hands-on interaction and takes a lively approach to positioning the annual fundraising campaign for success. Fundraising newcomers and development pros will discover what hinders fundraising excellence, how to minimize these factors and learn how to preserve positive relationships among volunteers and staff.

Case Study: This real experience grows out of a disruption in the continuity of the advancement department at a crucial time in the institution's history. Multiple considerations made it imperative for the organization to do what it had never done before. The surprising result has given staff, administration and donors alike the conviction of what can be achieved in fundraising (versus the previous 'certainty' of what was believed to be impossible).

Learning Objectives:

1. Participants will learn break-through strategies for achieving annual fundraising success.
2. Participants will understand the importance of equipping staff and volunteers to lead by example.
3. Participants will be prepared to anticipate the factors that 'derail' fundraising success.
4. Participants will discover the crucial role of relationships in achieving fundraising excellence.

5 STRATEGIES

1

Show WHY

2

Think BIG

3

Make a PLAN

4

Start EARLY

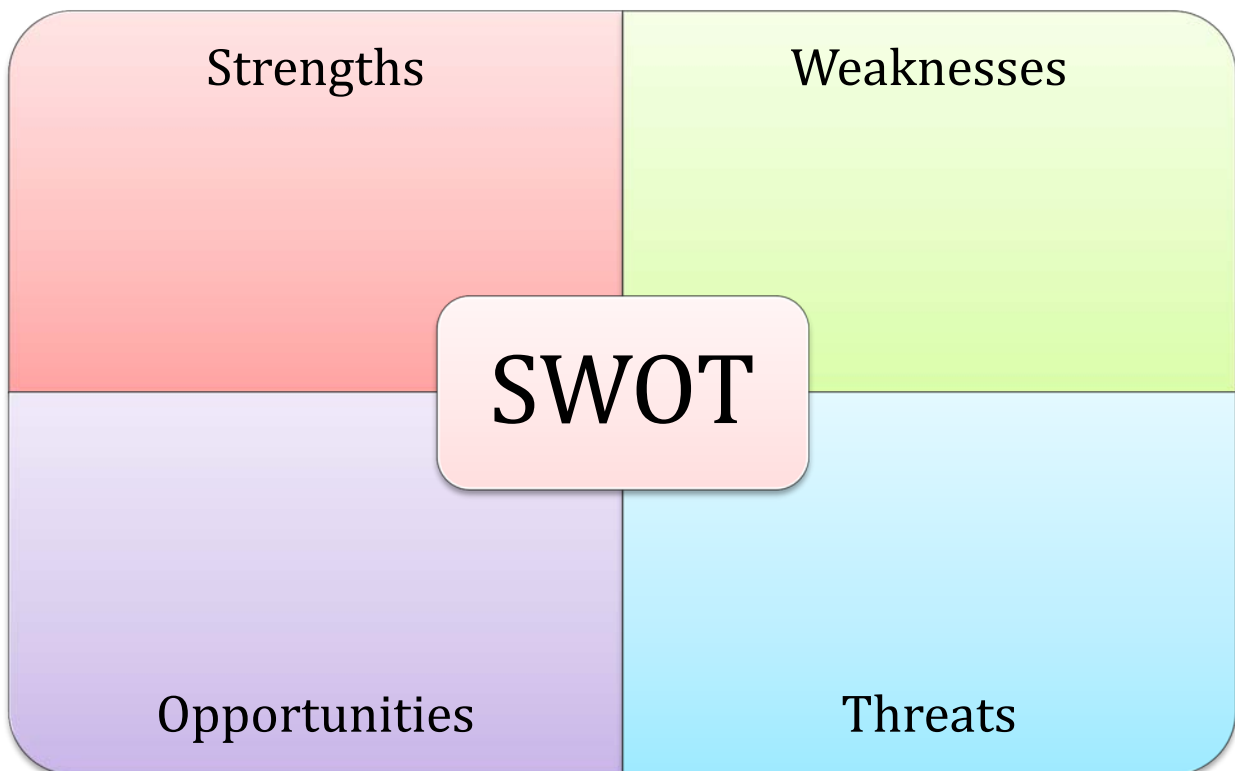
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ASK BOLDLY

Before you start:

Analyze the current program

OBJECTIVE: Increase annual fund revenue



Strengths are of internal origin and are helpful to achieving your objective.
What do you do better than others? What is unique about you?

Opportunities are of external origin and are helpful to achieving your objective.
What trends/ conditions positively impact you? What opportunities are present in the current market or environment?

Weaknesses are of internal origin and are harmful to achieving your objective.
What do your competitors do better than you? What can you improve?

Threats are of external origin and are harmful to achieving your objective.
What trends/ conditions negatively impact you? What threats are present in the current market or environment?

Put a name
and a face
on your
MISSION

Branding aligns *image* with *identity*

I will survey these constituencies to reveal perceptions of our identity:

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____

Define the real
FINISH LINE

Data: Does it matter?

What data do we track?

What data could/should we track?

Essential elements 8 of a PLAN:

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____

Segmentation allows us to speak *directly* to the donor.

Ways we can segment our appeals:

Data we will need to accomplish this:

Your secret weapon:
RELATIONSHIPS!

Who

How

What

When

TIP

Take an Educational Journey...

People to see:

Places to go:

Questions to ASK:

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

25 Recommended Resources

1. *Are You Ready for a Capital Campaign?* by Linda Lysakowski
2. *Asking about Asking: Mastering the Art of Conversational Fundraising* by M. Kent Stroman
3. *The Asking Academy* - www.ConversationalFundraising.com/the-asking-academy
4. *Asking Styles: Harness Your Personal Fundraising Power* by Andrea Kihlstedt
5. *Confessions of a Successful Grants Writer* by Joanne Oppelt
6. *Donor-Restricted Gifts Simplified* by Dan Busby
7. *50 Asks in 50 Weeks* by Amy Eisenstein
8. *Fired-Up Fundraising* by Gail Perry
9. *Fundraising Buffet* by Sandy Rees
10. *Fundraising Realities Every Board Member Must Face* by David Lansdowne
11. *Get Fully Funded* by Sandy Rees
12. *Influencer, The Power To Change Anything* by Kerry Patterson, Joseph Grenny, David Maxfield, Ron McMillan, Al Switzler
13. *Ingenius: A Crash Course on Creativity* by Tina Seelig
14. *Leadership Axioms* by Bill Hybels
15. *Leading With Questions* [blog] by Bob Tiede
16. *The Little Red Book of Wisdom* by Mark DeMoss
17. *The Nonprofit Consulting Playbook* by Susan Schaefer and Linda Lysakowski + 25
18. *Power Questions* by Andrew Sobel and Jerold Panas
19. *Raising More with Less* by Amy Eisenstein
20. *The Raising of Money: 35 Essentials Trustees are Using to Make a Difference* by Jim Lord
21. *Rules of the Red Rubber Ball* by Kevin Carroll
22. *Simple Steps to Growing Your Donors* by Kirsten Bullock
23. *The Transformational Power of Purpose* by Jim Whitt
24. *The Treasure Principle* by Randy Alcorn
25. *The Ultimate Gift* by Jim Stovall

Speaker Information

Pamela H Witter

Pamela Witter has overcome numerous obstacles in her personal life with the help of amazing teachers, leaders, family members and friends. Much like the characters in her book, *Hope Rising*, Pam made the transition from at-risk teen to successful professional. An avid learner, Pam enjoys exploring all that life has to offer and sharing her discoveries with others. She is an author, speaker, leadership coach and professional fundraiser.



Pam serves as Executive Director of Development for Houghton College where she oversees the fundraising operation and manages a donor prospect list. Her professional career has included positions in public relations, event management and fundraising – including extensive work on capital campaigns and in all areas of development (events, annual fund, major gift work, stewardship, foundations, corporations, board giving, and more).



She holds a B.A. in Communications from St. Bonaventure University and is completing an M.B.A. at Empire State College. Pam is a 2006 graduate of Leadership Cattaraugus and was named

Alumna of the Year in 2012. She is the co-founder and chairperson of Leadership Allegany – a tuition-based, year-long professional development training program.

Pam has received numerous awards including:

- 2012 Outstanding Achiever Award from the Greater Allegany County Chamber of Commerce
- 2011 "Forty Under 40" honoree from Buffalo Business First
- 2008 I.C.A.R.E. Award from HomeCare & Hospice
- 2012 Accolades Award in the Community Service Category from CASE.

Pam is an inspirational speaker, novelist and published author, a mother and wife. She currently serves as a Sunday School teacher for Cuba First Baptist Church and a member of the Board of Directors for Cuba Memorial Hospital.

Pam maintains a blog called *Theandric Musings* and is set to publish her second book in 2014. She and her husband Tom live in rural New York with their daughter Amelia. Learn more about her at www.pamelawitter.tateauthor.com.

M. Kent Stroman, CFRE

A talented speaker, insightful advisor and effective communicator, Kent Stroman has an appeal that transcends age, culture and occupation. Since 1976 he has been involved in teaching and organizational leadership, impacting numerous organizations with his passion for excellence.



Kent's purpose in life is to Equip, Inspire and Encourage. He accomplishes this through speaking, writing, teaching and consulting. Kent has been married to Marva for 35 years. Together they have three children; Aaron, Michelle and Monica, and six grandchildren! Kent enjoys water sports, travel, reading, cooking and singing in his church choir.

After a 25 year career in higher education, Kent launched STROMAN & associates, consulting in fundraising, board governance, strategic planning and leadership development. In recent years Stroman has been personally involved in raising tens of millions of dollars for charitable causes. He is a BoardSource-trained governance consultant, Sarkeys Foundation-approved retreat facilitator, and serves as an adjunct consultant for the Oklahoma Center for Nonprofits and the faculty of his AFP Chapter.



In addition to serving as Vice President of the MidAmerica Nazarene University Alumni Council (his alma mater), Kent has served his community on numerous boards including the Chamber of Commerce, Community Foundation and United Way.

In 2003 Kent was named the Outstanding Fundraising Executive by the Eastern Oklahoma AFP. In 2005 he was honored by Big Brothers Big Sisters with their cherished Ray G. Steiner "Champions" Award for "exemplifying the character qualities of leadership by example, integrity, generosity, and commitment to excellence; and for outstanding contributions to furthering the mission of Big Brothers Big Sisters."

Kent is a frequent speaker and presenter to regional and national audiences.