



Fundraising Best Practices for Alaska Community Foundation Affiliates

KEN MILLER, CFRE

DENALI FUNDRAISING & GRANT CONSULTANTS

SEPT 9, 2021

Introduction

Who Am I?

*Background &
“My Why”*

50 slides – 1.25 hr.
with time for
questions after
each section

*Put any questions
or comments into
chat or save to end*

*Thank you for your
investment in your
community!*

Plan & Calendar –

- Set goals & budget
- Create plan
- Create calendar

Grants - local Companies & Associations

- Who, when, what for, how much
- Local companies
- Local associations

Donations from Individuals –

- Appeal, affinity & acquisition mailers
- Events

Telling the Right Story (Jeff Brooks) – used with permission

- Organization as hero
- Beneficiary as hero
- Donor as hero

Online & Digital Fundraising

- Online Basics
- Website
- Email

Marketing & Promotion

- PSAs
- Events
- Misc

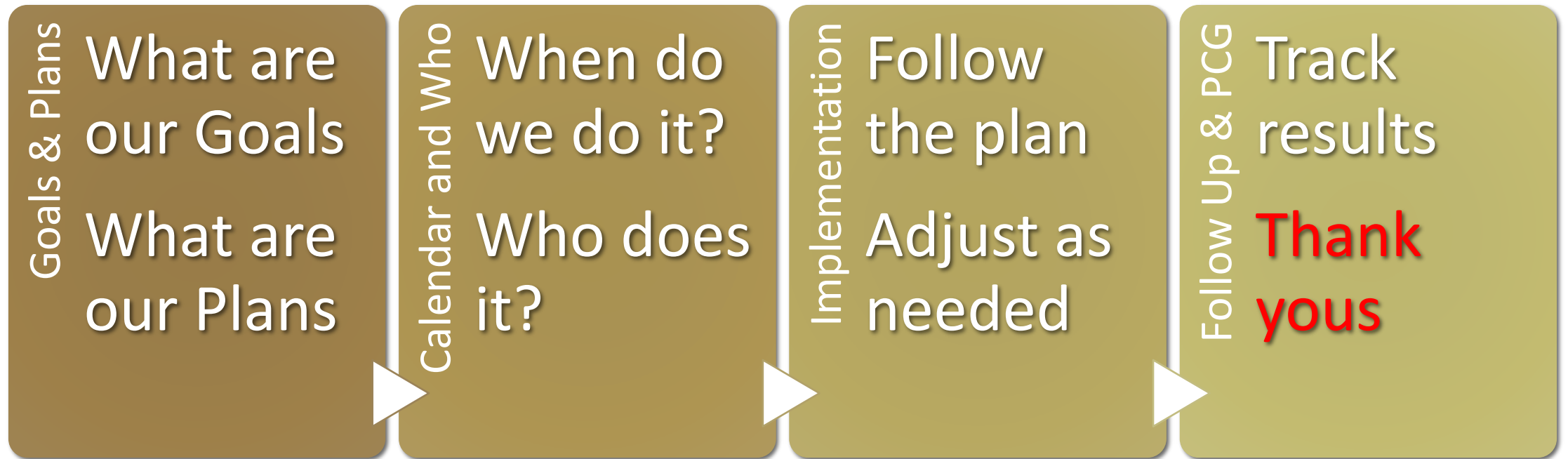
Major Donors

- Identifying
- Wealth Screening
- Thank You Meeting
- Ask Meeting

Wrapping it all up

- Questions
- Next Steps
- Further Info
- Contact Info

Your 2021 Annual Fundraising Campaign



Holiday Campaign Calendar



October –

Set goals & budget with staff
Create plan & calendar
Meet with staff, volunteers
and vendors



November –

1-2 local company requests
1st holiday mailers appeal, affinity
& acquisition (11/15)
Begin online marketing
campaigns (11/15)



December –

2nd holiday mailer appeal &
affinity (12/5)
End of Year online marketing
campaign & eblast (12/30 &
12/31)



Dashboard & Calendar

- Set goal for number of unique donors
- Set goal for number of transactions
- Set goal for amount in donations

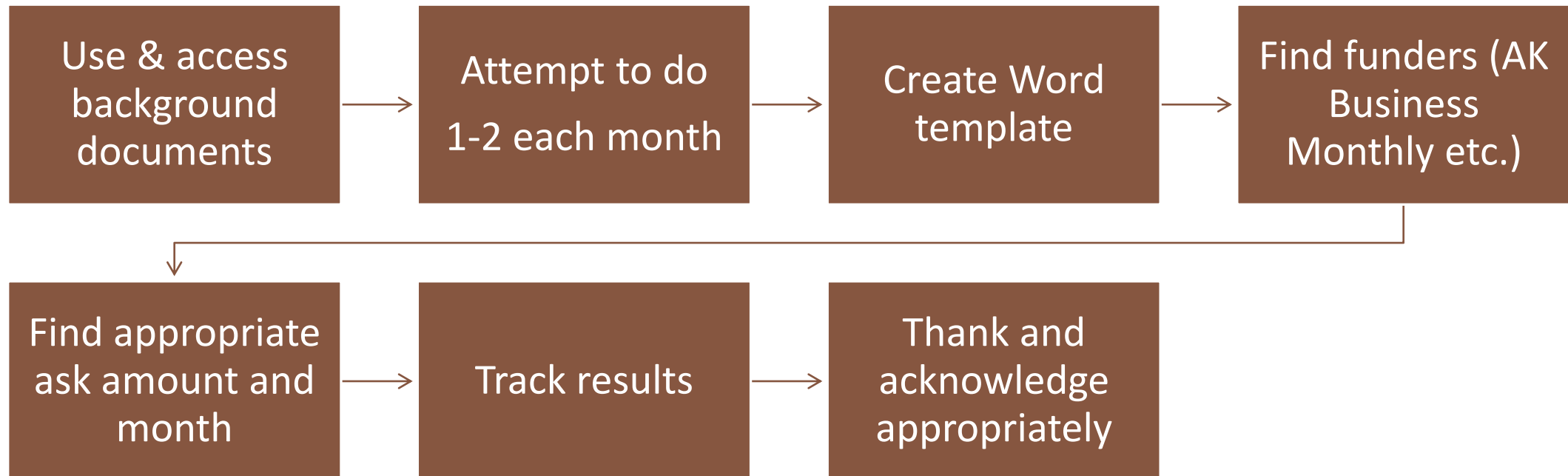
Sample Nonprofit Fundraising Dashboard

End of Month	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Year
Total donor database count													0
Major donor count													0
Major donor calls/meetings													0
Website visits													0
Email contacts													0
Enewsletters & eblasts													0
Facebook likes													0
Facebook posts													0
Online donations													0
Online income													0
Completed new RFF's													0
Amount in new RFF's													0
Individuals													0
Amount in donations													0
Organizations													0
Amount in donations													0
Total # of donations	0	0	0	0	0	0	0	0	0	0	0	0	0
Total Income	0	0	0	0	0	0	0	0	0	0	0	0	0

Fundraising Calendar

Month	What	Item	Type	Forecast
Jan	Direct Mail	2013 Receipt Mailer	Receipt Mailer	5
Jan	United Way	Community Fund Grant	Grant	5
Jan	Walmart	Walmart State Grant	Grant	40
Jan	State of Alaska	CAPIS request	Grant	unk
Jan	RFF	Wells Fargo	Grant	5
Jan				
Jan				
Feb	Direct Mail	Valpak	PCG Coupon	2
Feb	RFF	Misc local corporate request for funding (25)	Grant	10
Feb	Presentation	Association presentation	Marketing	na
Feb				
Mar	State of Alaska	PickClick Give Application	Grant	25
Mar	United Way	United Way CFC Application Due 3-28	Grant	10
Mar	Direct Mail	Spring Newsletter	Newsletter	20
Mar	RFF	Misc local corporate request for funding (25)	Grant	10
Mar	Event	Your spring event	Event	5
Mar				
Mar				
Apr	Direct Mail	Spring Acquisition	Acquisition	10
Apr	HDR	HDR Engineering Grants	Grant	5
Apr	RFF	Misc local corporate request for funding (25)	Grant	10
Apr				
Apr				
May	Direct Mail	Valpak	Coupon	2
May	Direct Mail	Appeal Mailer	Appeal Letter	20
May	RFF	Misc local corporate request for funding (25)	Grant	10
May				
May				
Jun	RFF	Foundation & Association request for funding (25)	Grant	10
Jun	RFF	ConocoPhillips request for funding	Grant	10
Jun				
Jun				

Local Company, Associations & Organizations (Request for Funding)



Nonprofit information needed for organization requests (RFFs)

Item	Status	Notes
Letterhead		
Logo		
501c3 Letter of Determination		
Articles of Incorporation		
Board List w 100% giving		
IRS Form 990		
Audited Financials		
Annual Report		
Organizational Budget		
Program Budgets (if needed)		
Mission Statement		
Organizational History		
Organizational Narrative		
Flyer		
Press Release template		
Request for Funding template (RFF)		
List of Corporate/Foundation funders		
Nonprofit Mailer ID (MID)		
Nonprofit mail authorization #		
List of Individuals donors		
Denali Fundraising - 250-8488		

Company request template example



AK Kidney Patients Association

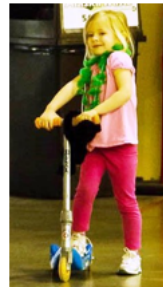
Request for Funding

February 21

2015

AK Kidney Patients Association is requesting \$250 in support for programs providing services to pre-dialysis, dialysis and transplant patients and their families in Alaska.

Afognak
Native Corp



AK Kidney Patients Association
325 E 3rd Ave #201
Anchorage, AK 99501

2/21/2015

Lester Lukin
Afognak Native Corp
3909 Arctic Blvd Ste 400
Anchorage, AK 99503

Dear Lester Lukin,

AK Kidney Patients Association is requesting funding of \$250 for the FY2015 AK Kidney Patients Association community programs. In particular we are requesting funding for operations and support for programs that directly impact and support approximately 1,000 pre-dialysis, dialysis and transplant patients, their friends and families across Alaska along with Alaskans at risk for kidney disease.

Please feel free to contact me with any questions or concerns and again thank you for allowing us the opportunity to make this request for support.

Sincerely,

Kristie Lemmon

Kristie Lemmon
Executive Director
kristie@alaskakidney.org
907 333-2257

Tax ID: 26-3251948

Organizational RFF template example

AK Kidney Patients Assoc. Request

AK Kidney Patients Association is requesting \$250 towards our FY2015 AKPA programs. Funds will be allocated for operating our 3 major programs directly supporting our clients.

AK Kidney Patients Assoc. History

The Alaska Kidney Patients Assn. (AKPA) was started in 1999 by dialysis patients to provide all kidney patients in Alaska with support, education, and advocacy. Incorporated as an Alaskan non-profit in 2008, the AKPA continues to serve the kidney patients of Alaska, and expanded their mission to include promoting organ donation (both living and deceased), public education, and the prevention of kidney disease. The AKPA has one employee, a budget of \$165,000 and over 100 volunteers.

AK Kidney Patients Assoc. Services Provided

The AKPA provides services through three major programs including:

- Patient Education, Support and Advocacy for All Alaskan pre-dialysis, dialysis and transplant patients.
- Public education and prevention of kidney disease through the free kidney health screening and education for Alaskans at risk for kidney disease that is offered throughout the year.
- Transplant Navigation assisting Alaskans' with the barriers that stop them from obtaining a kidney transplant.

The major services provided by the above listed programs are: Kidney Education Symposium in its 10th year and offers education through workshop for pre-dialysis, dialysis and transplant patients; Healthy Initiatives to improve dialysis patient's nutrition choices; Professional Renal Education conference for those who care for 'kidney patients'; Living Kidney Donor Workshops; Dialysis cooking classes; patients advocacy – stepping in when the kidney patients doesn't feel their voice is being listened to; Free Kidney Health Screenings for Alaskans at risk for kidney disease along with educational workshop throughout the year; social media and PSA's to educate general public about kidney disease; bi-yearly print newsletter and monthly email newsletter; peer mentors; and knowledgeable staff to answer all questions and direct to appropriate resources.

AK Kidney Patients Assoc. Description of Beneficiaries

The AKPA serves approximately 1,000 pre-dialysis, dialysis and transplant patients, their friends and families across Alaska along with Alaskans at risk for kidney disease.

Purpose of Grant Request

The Alaska Kidney Patients Association purpose for this grant request is to provide funds to support the 3 major programs that AKPA provides for its beneficiaries.

Recognition & Benefit

The AKPA would recognize your nonprofit in our semi-annual newsletter (circulation 1,500), on the AKPA website, on our social media platforms, and at our annual events (Kidney Walk, Share Your Spare Dash, Kidney Education Symposium, and the Professional Renal Education Conference). We would also, with your permission, send a press release to over 180 contacts in print, radio and TV media channels.

Program Cost

The total 2015 AK Kidney Patients Association program budget is \$106,350.

Funding Commitments

The Alaska Kidney Patients Association is supported by numerous individuals, corporations and foundations throughout Alaska.

Geographic and number of people served

The AKPA serves approximately 1,000 pre-dialysis, dialysis and transplant patients, their friends and families across Alaska along with Alaskans at risk for kidney disease.

Thank you for allowing us to make this request.

AK Kidney Patients Association Tax ID#: 26-3251948

Questions

Direct Mail Best Practices

List, list, list!

- Clean up donor & affinity list
- Purchase best local acquisition list possible
 - Denali FSP, PIP, Motznik

#10's and remits

- Make sure you have nonprofit status & mailer ID
- Start horizontal string with \$50
- Buy envelopes in bulk and spray –

Donor centric letter

- Always ask yourself “who is my donor?”
- Make the donor the hero (Jeff Brooks and Tom Ahern)
 - More in Telling the Right Story Module
- A picture tells a thousand stories...
- **Always** have a match!
- The power of the PS (always offer online or website giving)

Direct Mail Best Practices – Cont.

Postal Design Regulations

- Sizes – Postcard, Letter, Flat
- Mailing panel
- Automation

Mailer ID and NPO status

Non-Profit Rate

- 12c vs. 25c vs 49c

List Management

- National Change of Address (NCOA)
- Always run NCOA before mailing with TrueNCOA

How to tell stories



...that motivate donors to give

The *real* story is the *donor's* story



Show me how I can
change the world through
your organization!

... by making it
clear *they* are
the **hero** in the
fundraising
situation.



3 ways to tell a story in fundraising

(one right, one wrong, one half-right)

Organization as hero

When I met Robina, I made her a promise: We will take care of your children after you're gone.

It was not an empty promise. We were already at work in her village in Uganda when the HIV/AIDS pandemic began killing everyone between the ages of 17 and 60.

Tragically, Robina died two weeks later. But I'm glad to say we're working with her five children through our thriving programs for the hundreds of HIV/AIDS orphans in the village. We're helping them build sustainable, hope-filled futures through:

- Income generation
- Economic development

- Civil society training

And that's just the beginning...

Heavy on facts & numbers

Light on “you”

Jargon

Boring bullets

Organization as hero

When I met Robina, I made her a promise: We will take care of your children after you're gone.

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Jargon

Boring bullets

Beneficiary as hero

When Robina's husband began to lose weight, she knew he had AIDS. And that meant two things: That he had a couple weeks to live, and she had only a few more than he did. She died two weeks after I met her.

A mother of five young children, Robina lived on an island in Lake Victoria, in Uganda. AIDS had swept through the village like a fire, leaving almost no one alive between the ages of 17 and 60.

Robina nodded politely when I visited her dirt-floor, one-room hut. Hollow-eyed and skeletal, she sat motionless on a mat. Only her eyes seemed alive -- and they were full of sadness.

Her greatest fear, she told me, wasn't her coming death, but what was ahead for her children. Her frail, elderly mother had agreed to care for them. But how could she possibly provide for so many?

Tends to be over-written

Light on "you"

Questionable relevance

Beneficiary as hero

When Robina's husband began to lose weight, she knew he had AIDS. And that meant two things: That he had a couple weeks to live, and she had only a few more than he did. She died two weeks after I met her.

A mother of five young children, Robina lived on an island in Lake Victoria, in Uganda. AIDS swept through the village like a fire, leaving almost no one alive between the ages of 17 and 40.

Robina looked pale when I visited her dirt-floor, one-room hut. Her body was thin and skeletal, she sat motionless on a stool, and her eyes seemed alive -- and they were full of pain.

Her greatest fear, she told me, wasn't her coming death, but what was ahead for her children. Her frail, elderly mother had agreed to care for them. But how could she possibly provide for so many?

Tends to be over-written

Light on "you"

Questionable relevance

Donor as hero

I wish you could have met Robina. You would have understood her completely, even though her life was very different from yours.

I say "was," because Robina died two weeks after I met her. Like so many people in her village in Uganda, she died of AIDS. Only elderly people and children were left alive after the disease swept through the vilage.

While Robina lay dying, she had one terrible worry: What about the children? Who will care for my five little ones?

Her elderly mother, of course, would do her best. But how could she care for so many?

That's why I'm coming to you.

Colloquial

Reveals "why I'm writing"

Lots of "you"

Leads to CTA

5 hints for donor-focused fundraising stories

#1

Say “you” a lot

“I’m writing to you because...”

“You can help.”

“The difference you can make will amaze you.”

“Your donation will go to work immediately.”

#2

Put the donor in the story

“I wish you could see it.”

“You’d understand right away.”

“I’m so thankful to have friends like you.”

#3

Write like your Aunt Ruth

(Not like the incredible Hemingway that you are.)

#4

Keep your heart on your sleeve

“It broke my heart.”

“I’ve never seen anything so inspiring.”

“I thank God for people like you.”

#5

Avoid statistics

(Facts and numbers undermine even the best stories.)

Questions

Digital & Online Fundraising Overview

Goals & Plans

- What are our goals?
- What are our plans?

Calendar and Who

- When do we do it?
Who does it?

Implementation

- Follow the plan
- Adjust as needed

Follow Up

- Track results
- Thank yous

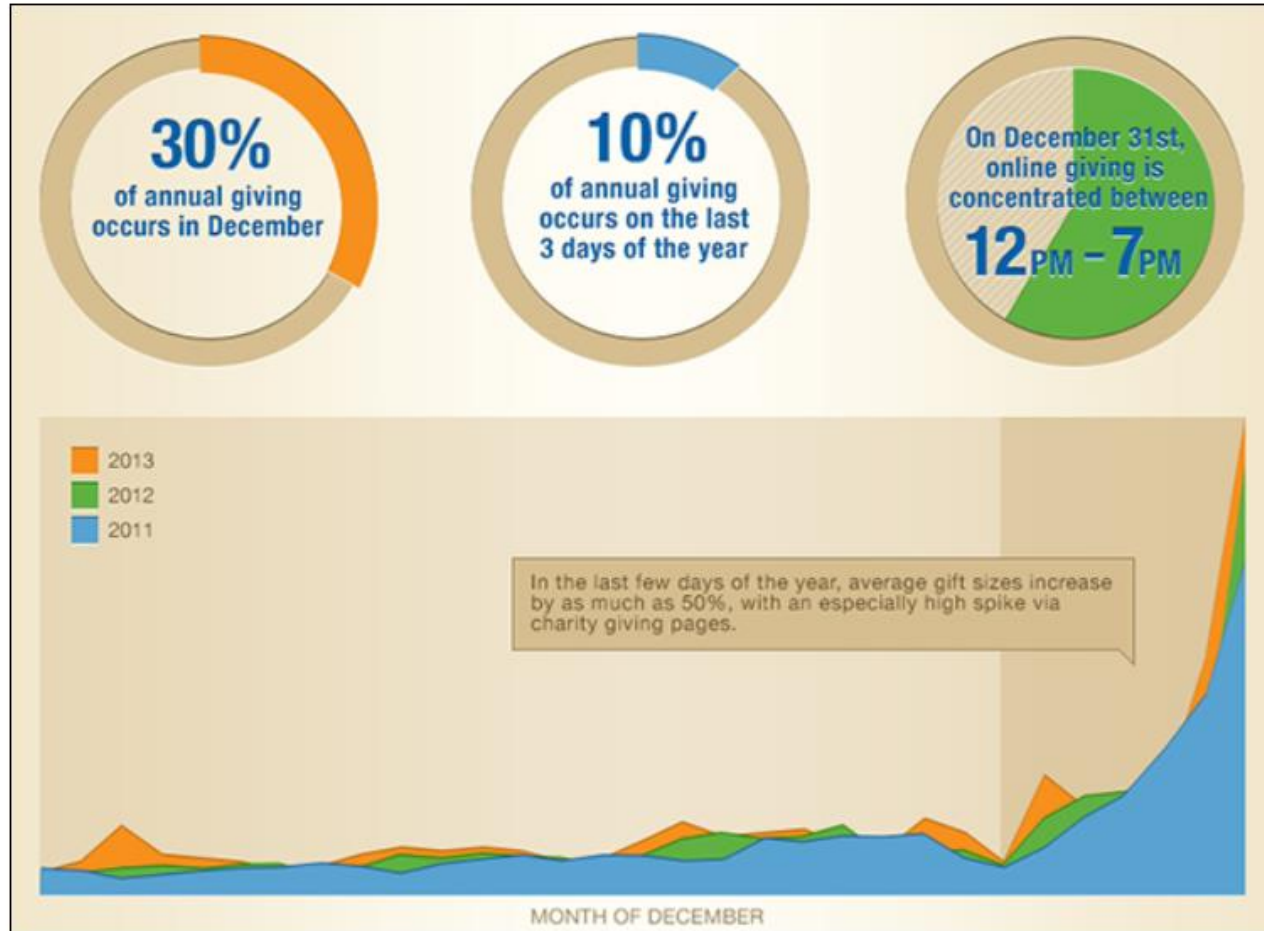
PERCENTAGE OF TOTAL FUNDRAISING FROM ONLINE GIVING BY ORGANIZATION SIZE



Why Online?

- Younger donors very comfortable with online communication and donating –
- 2019 total is 8.7%
- 2019 14.1% of total fundraising from online giving for small orgs
- Source: Charitable Giving Report

Thirty percent of all online donations are made in December and 10% of all annual giving happens in the last three days of the year. Online fundraising campaigns should be focused on the online giving habits of their donors.



networkforgood.org/digitalgivingindex

When



Digital & Online Fundraising

Website & Email

Website is the key to all online donations

- Audit website

- Check all links and look at on mobile platform

- Create best practices landing page

Email

- List

- Subject line

- Links and buttons that work on mobile

Website – Home Page

The screenshot shows a web browser window with the URL <https://www.beanscafe.org/>. The browser's address bar and tabs are visible at the top. Below the browser window, the website's header features social media icons for Facebook, Twitter, YouTube, and Pinterest. To the right of these icons, the address is listed: 1101 East 3rd Avenue Anchorage, AK 99501 and PO Box 100940 Anchorage, AK 99510. A prominent orange "Donate" button is positioned to the right of the address. The main logo for "Bean's Café" is centered, with the tagline "Feeding the hungry, and sheltering those in need since 1979" below it. A navigation menu below the logo includes buttons for Home, Our Story, Events, Donate, Ways to Help, Contact, Employment, and The Children's Lunchbox. The main content area features a large photograph of a person's hand holding a plate of macaroni and cheese, while another person's hand, wearing a white glove, serves the food. At the bottom of this image, the text "Serving men, women, and children 365 days a year" is displayed in white.

Website – Home Page cont.

The screenshot shows a web browser window with the URL <https://www.beanscafe.org/>. The browser's address bar and tabs are visible at the top. The website content is organized into three columns: 'The Bean's Café Story', 'The Children's Lunchbox', and 'Newsletter Signup'. Below these columns is a 'Welcome to Bean's Café!' section with a quote. This is followed by an 'Upcoming Event - 5th Annual Bean's Café "The Pour" (Dec. 4, 2014)' section featuring a photo and a 'Tickets' button. The 'Member of:' section displays logos for United Way, Charity Navigator, and Catalyst Kitchens. The footer contains 'Useful Links', 'Accredited Charity' information, and 'Get in Touch' details.

[The Bean's Café Story](#) [The Children's Lunchbox](#) [Newsletter Signup](#)

Bean's Café "Why" Video The Children's Lunchbox 720p

Grady LeBlanc
Former Client

Your Name (*)
Email Address (*)
Please enter the text to proceed (*)
o g z X
Sign up!

Welcome to Bean's Café!

"The underlying premise of Bean's Café is a deep belief in the inherent dignity of every person, a belief that people respond with kindness when treated kindly, with trust when trusted, and respectfully when respected. Our aim is not to set up a value system – determining what is right or wrong – or a way of life for persons, but to allow them to form their own. In this situation a person is not pressured into acting in a special way, and their eventual response is free, lasting, and more fully themselves"

Upcoming Event - 5th Annual Bean's Café "The Pour" (Dec. 4, 2014)

[Click here to learn more!](#)

Tickets

Member of:

Beans Café, Inc. (The Children's Lunchbox is a Guidestar Exchange Good Participant)

CHARITY NAVIGATOR
Four Star Charity

United Way

A RISING MEMBER OF
CATALYST KITCHENS
COLLABORATION (BEANS@CATALYSTKITCHENS.ORG)

Useful Links

- > [Donate](#)
- > [Volunteer](#)
- > [Events](#)
- > [Google+](#)
- > [Privacy Policy](#)
- > [The Children's Lunchbox](#)

Accredited Charity

BBB ACCREDITED CHARITY

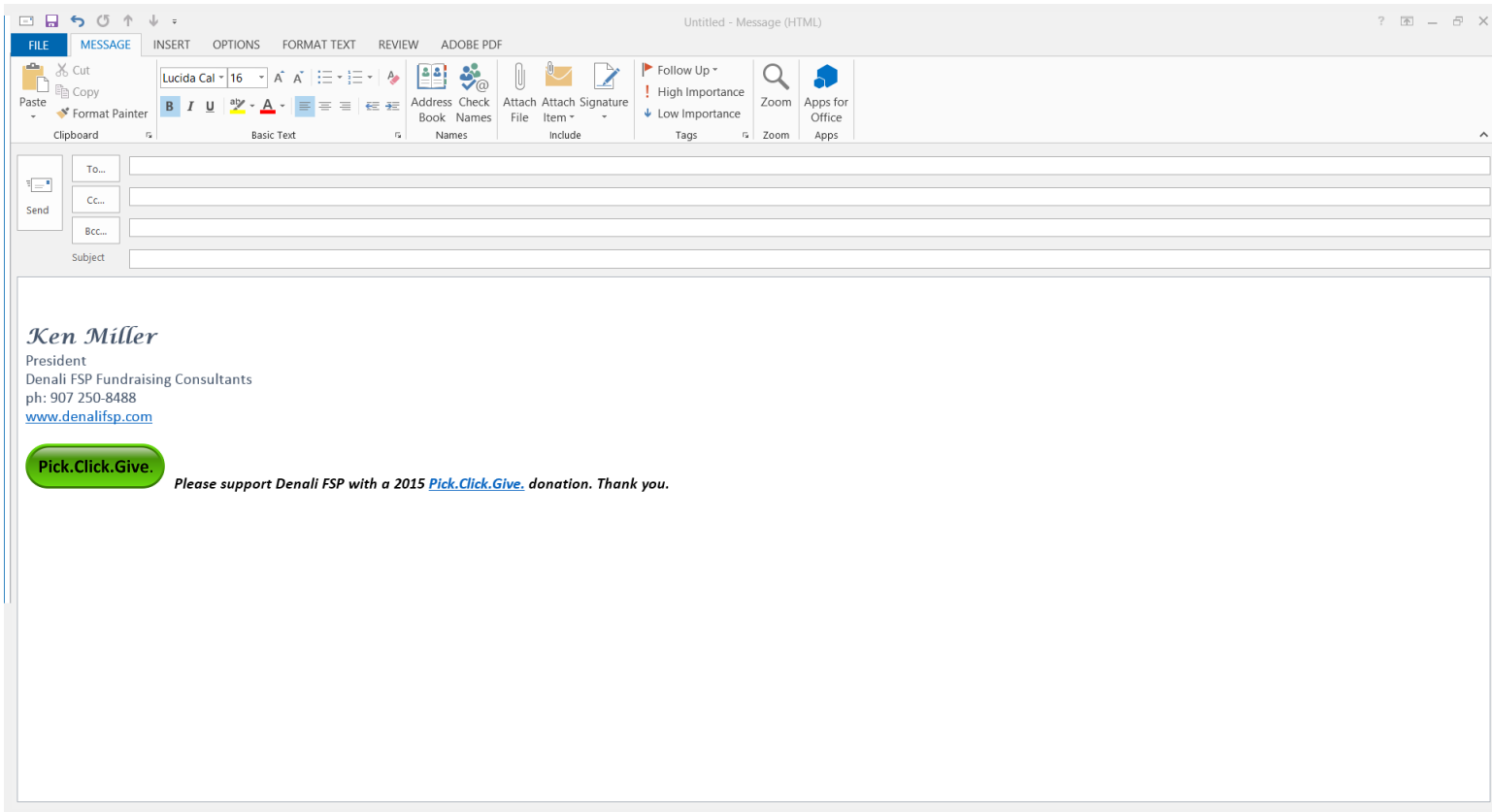
This BBB Accredited Charity meets all 28 Standards for Charity
Accountability and is a Seal Holder.

Get in Touch

Bean's Café
PO Box 100340
Anchorage, AK 99510

(907) 274-9395
info@beanscafe.org

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Email Signature for all Staff/Volunteers

Pick.Click.Give. to the Alaska Boxing Academy



Dear Ken,

Help support the Alaska Boxing Academy in 2015 with a Pick.Click.Give. donation this year. Your support helps ABA to teach and provide direction for at risk youth in Anchorage.

"One round at a time..."

Pick.Click.Give. provides a safe, secure and easy way to make a donation to the **Alaska Boxing Academy** and you can join many others in supporting a nonprofit program that helps at-risk youth in Anchorage. Visit www.akboxing.org for more information on the Alaska Boxing Academy and thank you for supporting us in our mission to help at-risk youth.

Pick.Click.Give.



eBlasts

PSAs and Ads

- **Radio PSA - free**
 - 15 sec or 30 sec
 - Date, time, location
 - Why this event
 - The ask – where to purchase tickets or register
 - Make sure you have written version of PSA for DJs to read
 - Contact Denali FSP for list of 81 radio stations
 - Radio shows
- **TV PSA - free**
 - Very effective
 - Make sure there is an intro and outro
 - 15 or 30 sec video
 - Make sure there is a URL or phone # to purchase tickets
 - Contact Denali FSP for list of 23 TV stations
- **Radio & TV Ads**
 - Same as above except not free!

Please contact local radio stations and ACF for approval

Radio PSA To Be Read or Recorded



Alaska BOXING Academy

Promoting the development of physically and emotionally healthy young adults. ONE ROUND AT A TIME!

PO Box 201231, Anchorage AK 99520 - www.akboxing.org - email: info@akboxing.org

Alaska Boxing Academy Public Service Announcement

PSA, Thirty (30) SECONDS

Run: December 15th 2014 - March 30th, 2015

FOR MORE INFORMATION:

David Carey

Program Director

Alaska Boxing Academy

555-1212 | info@akboxing.org

SUBJECT: Pick.Click.Give. & the Alaska Boxing Academy

Many Alaskan's are busy these upcoming months filing for the 2015 Permanent Fund Dividend. This year you have the opportunity to support the Alaska Boxing Academy by contributing part or all of your permanent fund dividend through the Pick.Click.Give. program.

Pick.Click.Give. provides a safe, secure and easy way to make a donation to the Alaska Boxing Academy and you can join many others in supporting a nonprofit program that helps at-risk youth in Anchorage. Visit www.akboxing.org for more information on the Alaska Boxing Academy and thank you for supporting us in our mission to help at-risk youth.

TV PSA (if 30 sec video available)



Events

Problems with events

- Usually poor (ROI) return for time invested
- Too many local events
- Can be costly

Positives from events

- Acquire new supporters
 - Get names!
 - Get addresses
 - Get emails
- Involves volunteers
- Involves board
- Promotion and branding of nonprofit
- Can be profitable

Questions

Major Donors - Overview

Identify

- \$500 and above
- Monthly or regular donors

20/80 rule (Pareto principle) Pareto squared – Top 4% = 60%

Wealth Screening

- Donorsearch.net, wealthengine.com

Approach and ask

- 1st meeting
 - Thank you, why and future plans
- Ask meeting
 - Advisory Board member
 - Role play
 - Thank you for meeting with us and we would like to thank you for.... (past support)
 - Remember the why
 - Future plan
 - Ask for specific amount (your support this year will allow us to do...)
 - Be quiet, listen and wait (always yes or not now because of..., rarely no)
 - Thank again for time or support

Major Donors

First meeting

- 1st meeting
 - Phone call to set up meeting
 - Advisory Board member
 - Coffee shop, donors' home, *nonprofit's office*
 - Thank you, why and future plans (people donate for the future...)
 - No ask for support but if donor wants to donate...
 - Ask for tour or more information

Major Donors

Approach and ask

- 2nd Ask for support meeting
 - Advisory board member
 - Program manager can set appointment
 - Role play
 1. Thank you for meeting with us and we would like to thank you for.... (past support)
 2. Remember the why and speak about that
 3. Future (in 2022 we hope to expand (add, enhance, grow) our...
 4. Ask for specific amount (Would you be open to supporting us this year with a pledge/donation of \$5,000 which will allow us to do...)
 5. Be quiet, listen and wait (usually **YES** or **not now** because of..., rarely **no**)
 6. Thank again for time or support
 7. Follow up with letter/card no matter the answer

Next Suggested Steps...



Establish or meet with Fundraising Committee



Share presentation internally, set calendar



Wealth Screen, prepare direct mail and holiday campaign



Enjoy the process and the journey



Contact me or AK Community Foundations w questions

Presenter's Contact Information

Ken Miller – Denali FSP Fundraising Consultants – www.denalifsp.com

907 250-8488 or ken@denalifsp.com

Blogs and websites to favorite:

Jeff Brooks – “Future Fundraising Now”

Roger Craver – “The Agitator”

Sean Triner – “Pareto Fundraising”

Jon Loomer – “Jon Loomer Digital”

Tom Ahern – “Donor Communications”

Thank you!