

**UNDERSTANDING  
PHILANTHROPY &  
A DIVERSE APPROACH  
TO FUNDRAISING**

PRESENTED BY:

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## **INTRODUCTION:**

*Got a question? ASK!*

- 1. WHAT IS THE DIFFERENCE BETWEEN PHILANTHROPY & FUNDRAISING?**
- 2. HOW DOES MEANINGFUL MARKETING IMPACT PHILANTHROPY?**
- 3. UNIQUE APPROACHES TO THE CYCLE OF FUNDRAISING**

*Got a question? ASK!*

1.

**WHAT IS THE DIFFERENCE  
BETWEEN PHILANTHROPY  
& FUNDRAISING?**

<https://youtu.be/aC-9jwDQm7w>

## WHAT IS PHILANTHROPY?

“We think of philanthropy, and it’s often a word reserved for only the rich ... What really works is when everyone is giving the assets or resources they bring to bear to make a vision come true. Some of those resources are **financial**. Some are **sweat equity**. Some of them are **devotion and passion** for what everyone wants to happen. Whatever they can contribute, everybody’s participation is an equal asset.”

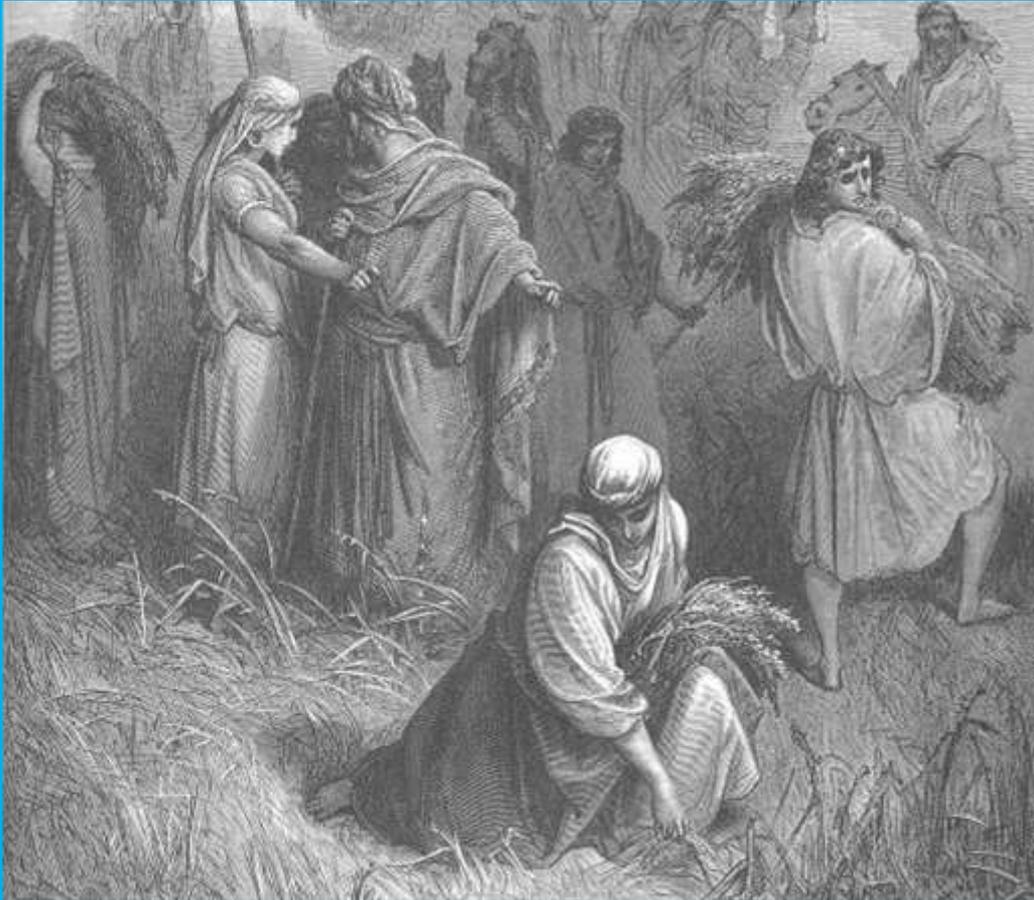
~ Lynne Twist, *The Soul of Money*

# WHAT DOES THIS IMAGE HAVE TO DO WITH FUNDRAISING?

- TAKES TIME
- BUILD CONNECTIONS
- MANY VARIABLES
- DELICATE BALANCE
- CAPACITY



# “Handfuls of Purpose”



## STORY OF RUTH

And when she was risen up to **glean**, Boaz commanded his young men (**reapers**), saying, Let her **glean** even among the sheaves, and reproach her not:

And let fall also some of the **handfuls of purpose** for her, and leave them, that she may **glean** them, and rebuke her not.

-Ruth 2:15-16



## GRATITUDE

“Then she fell on her face, and bowed herself to the ground, and said unto him, Why have I found grace in thine eyes, that thou shouldst take knowledge of me, seeing I am a **stranger?**”

~ Ruth 2:10

*Got a question? ASK!*

2.

**HOW DOES MEANINGFUL  
MARKETING IMPACT  
PHILANTHROPY?**

<https://youtu.be/L2ifUll25p8>



**CORPORATE**

**SOCIAL RESPONSIBILITY**



**SIZE DOESN'T  
MATTER**

# COMMUNITY SUPPORT



Wishes are 100% supported by donations from:

- Businesses
- Churches
- Community Groups
- Schools & Clubs
- Individuals & Families



Adam, 9  
cancer

I wish to go on a cruise



## CAUSE MARKETING

IT'S A **WIN-WIN**  
SOLUTION

## WHAT IS CAUSE MARKETING?

Cause marketing or cause-related marketing refers to a type of marketing involving the **cooperative efforts** of a **for-profit business** and **a non-profit organization** for mutual benefit.

In a cause promotion a **corporation provides** funds, In-kind contributions or other corporate resources to **increase awareness and concern about** a social cause or to **support fundraising or volunteer recruitment** for a cause.

<https://youtu.be/ddQlhC4EzdY>



You'll *love* what you see!



Alex, 4  
Leukemia  
I wish to go on a big ship!

# MAKE-A-WISH.

We grant the wishes of children with life-threatening medical conditions to enrich the human experience with hope, strength and joy.

[Click Here To Learn More](#)

## REQUEST A FREE BID

First Name \*

Last Name \*

Email \*

Phone \*



[SUBMIT](#)

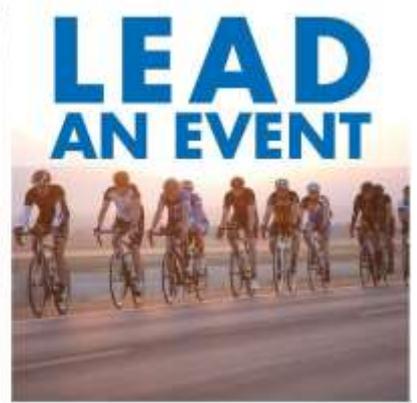
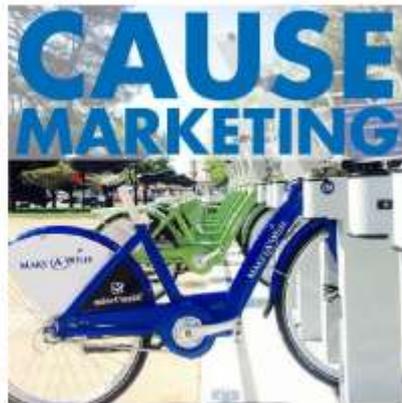
**Utah's #1 Replacement Window Company**

# SUSTAINABILITY



ENGAGEMENT  
= LONG-TERM  
PARTNERSHIP

# PROVIDE A MENU OF OPTIONS



**REMEMBER TO...**



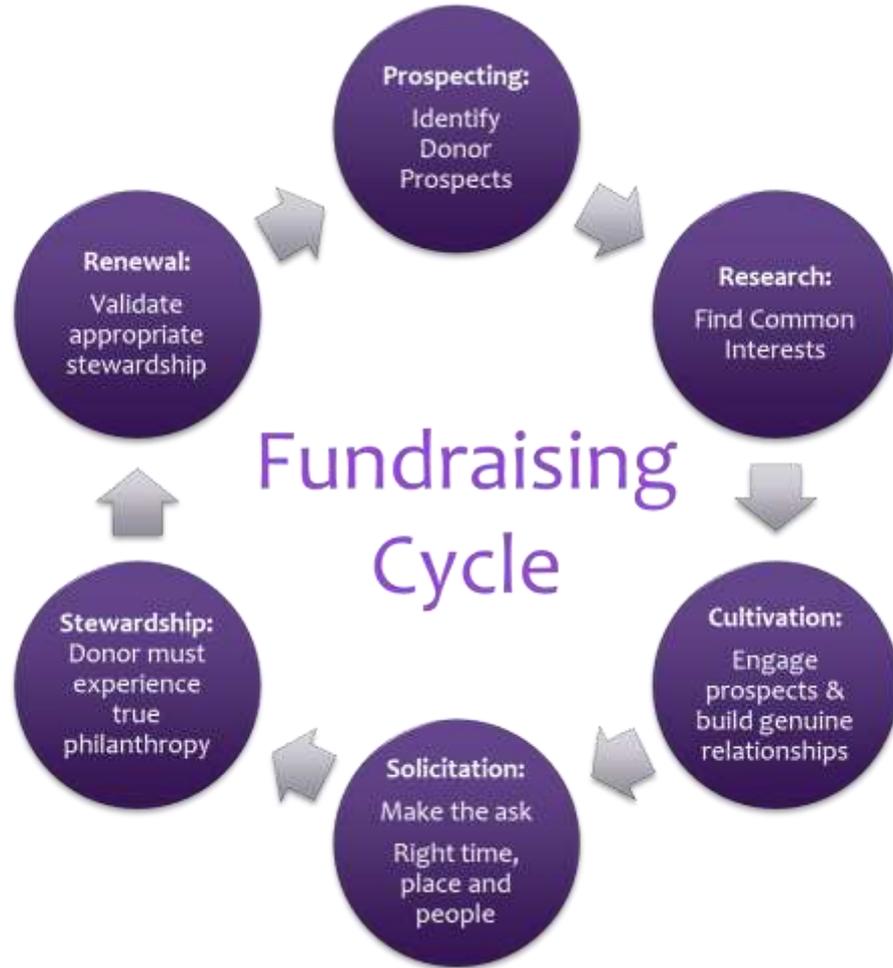
**BE FEARLESSLY  
AUTHENTIC**

*Got a question? ASK!*

3.

## **UNIQUE APPROACHES TO THE CYCLE OF FUNDRAISING**

# UNDERSTANDING THE FUNDRAISING CYCLE



# PROSPECTING & RESEARCH

- **Discovery**
- **Capacity**
- **Interest**
- **Connection to organization?**
- **Create a prospect profile**



# CREATE A PROSPECT PROFILE

- Online (Business profiles, LinkedIn, Facebook, other online resources)
- Your organization's database
- Wealth screenings, 990's, public records

## GINA SANCHEZ, CEO OF SUGAR TOWN RECORDS



Email: [gs@sugartown.com](mailto:gs@sugartown.com)

Cell: 926-000-0008

Address: Somewhere awesome, Sugarville, NY 23006

### 1 EDUCATION, FAMILY, AND WEALTH

SOURCE: LinkedIn, Database

Gina is married with one teenage child. She is currently the CEO of Sugar Town Records headquarters in the Greater New York City Area. Her hobbies include dance, cooking (master chef level) and wine tasting.

Personal Wealth Engine Score = 1

Net Worth = \$5 – 10MM

Giving Capacity = \$1 – 5MM

### 2 PROFESSIONAL EXPERIENCE

SOURCE: LinkedIn

SENIOR LEVEL EXECUTIVE with 25 years of experience in the music production industry. She has been at the helm of Sugar Town Records for 9 years and has expertise in acquisitions, general management and promotions.

#### CEO

Sugar Town Records

January 2008 – Present (9 years 3 months) New York, NY

#### VP of Marketing

Sugar Town Records

March 2003 – January 2008 (4 years 10 months) New York, NY

### 3 EXISTING CONNECTION/PARTNERSHIP

- Recently termed off of the board of directors after 4 years
- Giving history began with \$5,000 annual gift in December 2006; cumulative giving to date = \$1.3 M
- Willing to continue hosting benefit concerts with top label talent

### 4 MOVES MANAGEMENT STATUS/ANTICIPATED ASK

- SOLICITATION
- ASK: Consider anchor gift for new endowment at \$5 MM
- BACK UP ASK: 3 year annual commitment of \$1MM

# CULTIVATION

- **LISTEN** – Ask thoughtful discovery questions
- **Cold call visits – “FORM”**
  - Family, Occupation, Recreation, Mission or Motivation
- **Don't get stuck in CULTIVATION**
  - Know your purpose; pursue it; move toward solicitation
- *Should you discuss your role as a fundraiser?*

# SOLICITATION

- **5-Minute Table Exercise:**
  1. Think of one charity YOU give to
  2. Share this charity with your table and, in once or two sentences, share why.
  3. ?

# SOLICITATION



# STEWARDSHIP

How do we provide a true **philanthropic experience** for our donors?

What are **today's donors**, both corporate and individual, **looking for** from those they support?

# STEWARDSHIP

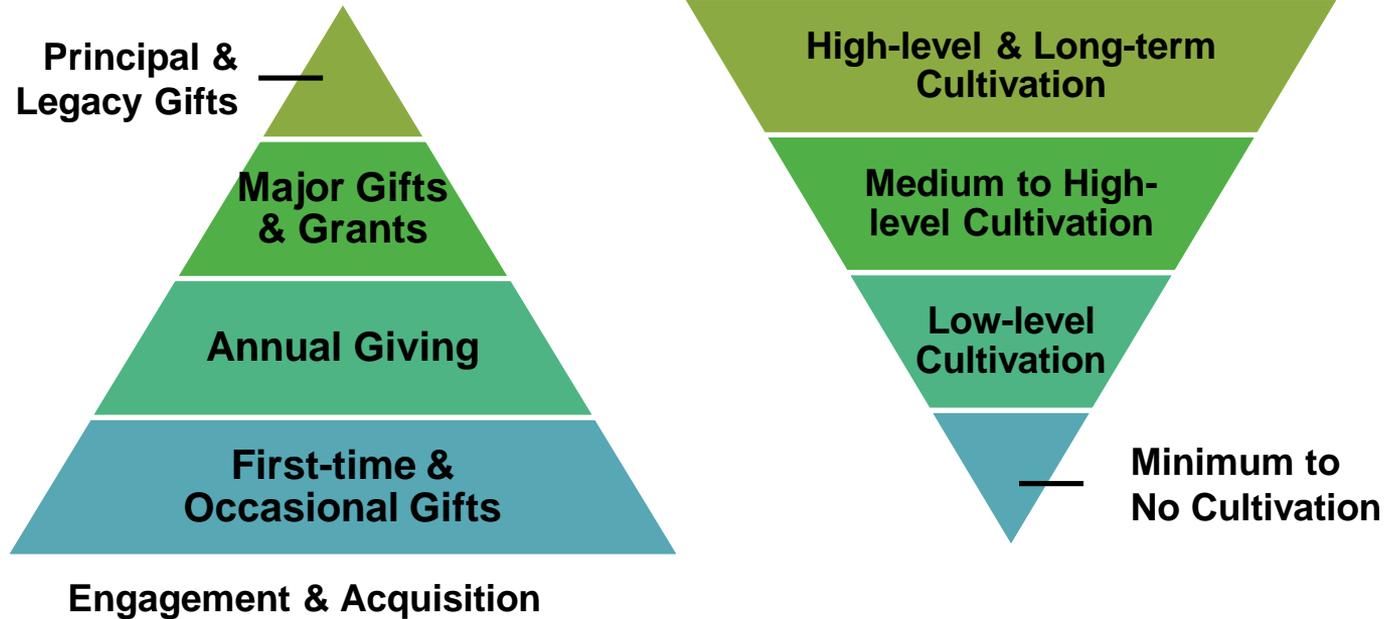


- Give unique, mission-focused thank yous
- Feature donors in your social feed & PR opps
- ASK each donor what meaningful stewardship would look like for them

## RENEWAL ... STEPS TOWARD NEXT ASK

- **Get to know your donors even better**
  - » What are **their ambitions** for the near future?
  - » Stay up to date with **family happenings**
  - » **Continue to ask** about **their giving motivation** as this may change and/or open up new opportunities
- Remember **continued gratitude** and **engagement** will be **appreciated** and will increase your chance of **receiving continued support**.

# THE DONOR & CULTIVATION PYRAMIDS



# ENGAGEMENT & ACQUISITION

- Direct mail
- Email campaigns
- Phonathons
- Events
- Volunteer work



United Way of Salt Lake

# ANNUAL GIVING

- **Broaden your Pyramid's Base w/ Annual Donors**
- **Build a habit of giving to your organization**

» Examples:

- Alumni Associations
- Donor Networks or Societies
- Corporate or Workplace Campaigns
- Employee Giving Campaigns
- Phonathons
- Direct Mail Campaigns
- Event Sponsorships

## MAJOR GIFTS

- Let's hear how some of you define a major gift...\$
- Is there someone in your office dedicated to executing on a major gifts strategy?
- Many organizations need to spend more time here and provide essential resources for success.

# PRINCIPAL GIFTS & PLANNED GIVING



- **Principal Gifts – Usually \$1 Million +**
  - Cause transformational change in an organization
- **Planned or “Legacy” Gifts**
  - An avenue for endowed gifts
  - Sustainable income

NO =

**NEXT OPPORTUNITY**

# THANK YOU

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