

YOUR ENTHUSIASM.

OUR EXPERIENCE.

# Unleashing Your Inner Fundraiser Superhero...

Lay the groundwork for 'The Ask!'

UA Foundation Gift Center  
Grants for Lunch Presentation  
Wednesday November 18, 2015

**smith&dale**  
PHILANTHROPIC COUNSEL

# Overview

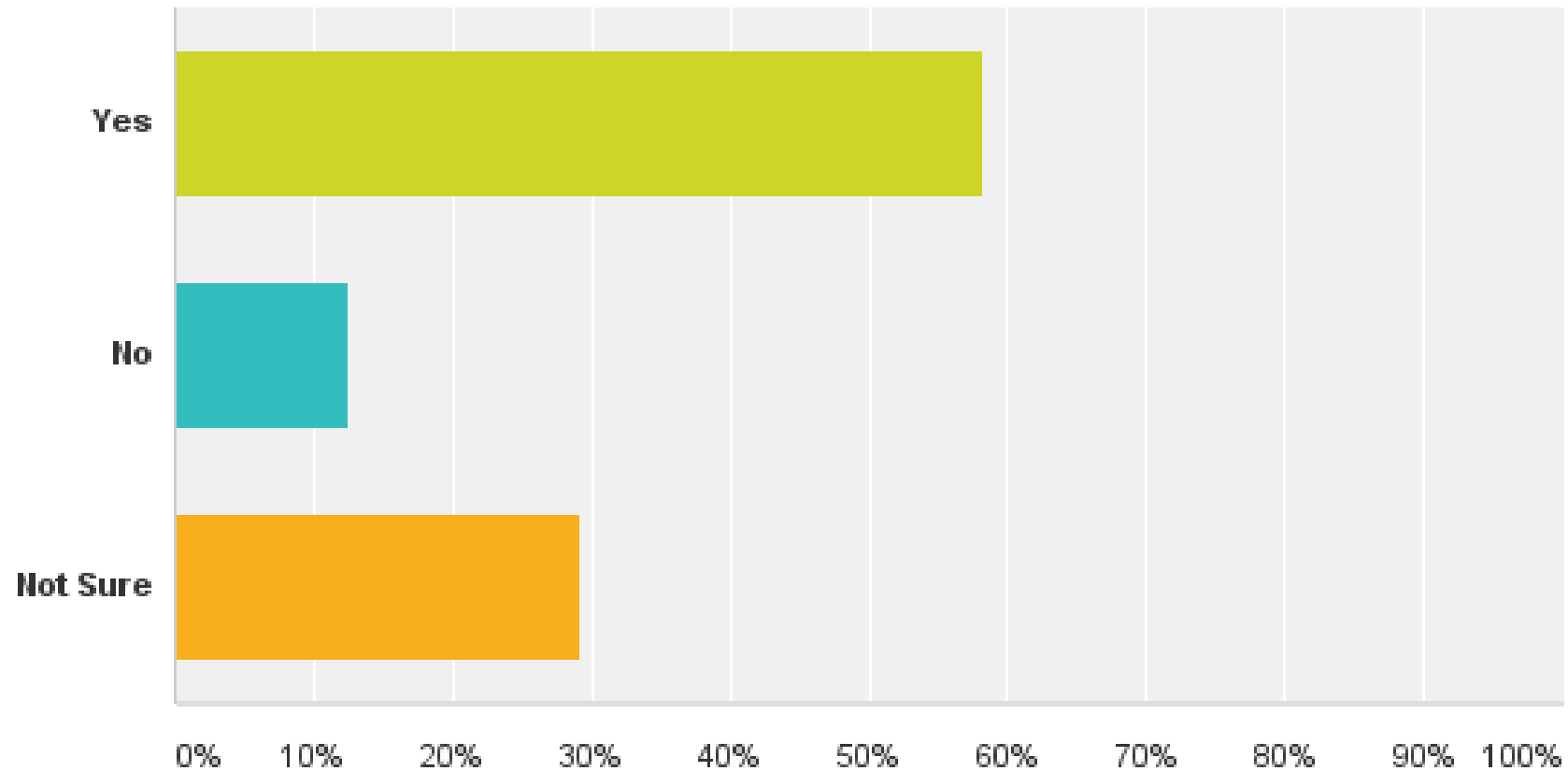
How do gifts go from  
\$500 to \$5,000...?  
\$5,000 to \$50,000...?  
And on and on...

- ‘Cultivation’: a nice word for ‘being polite and inclusive’
- The power of the UNusual suspects!
- Relationships, Relationships, Relationships...
- Raise your profile: here, there & everywhere

Before all that...  
who are (24 of us)  
in this room?



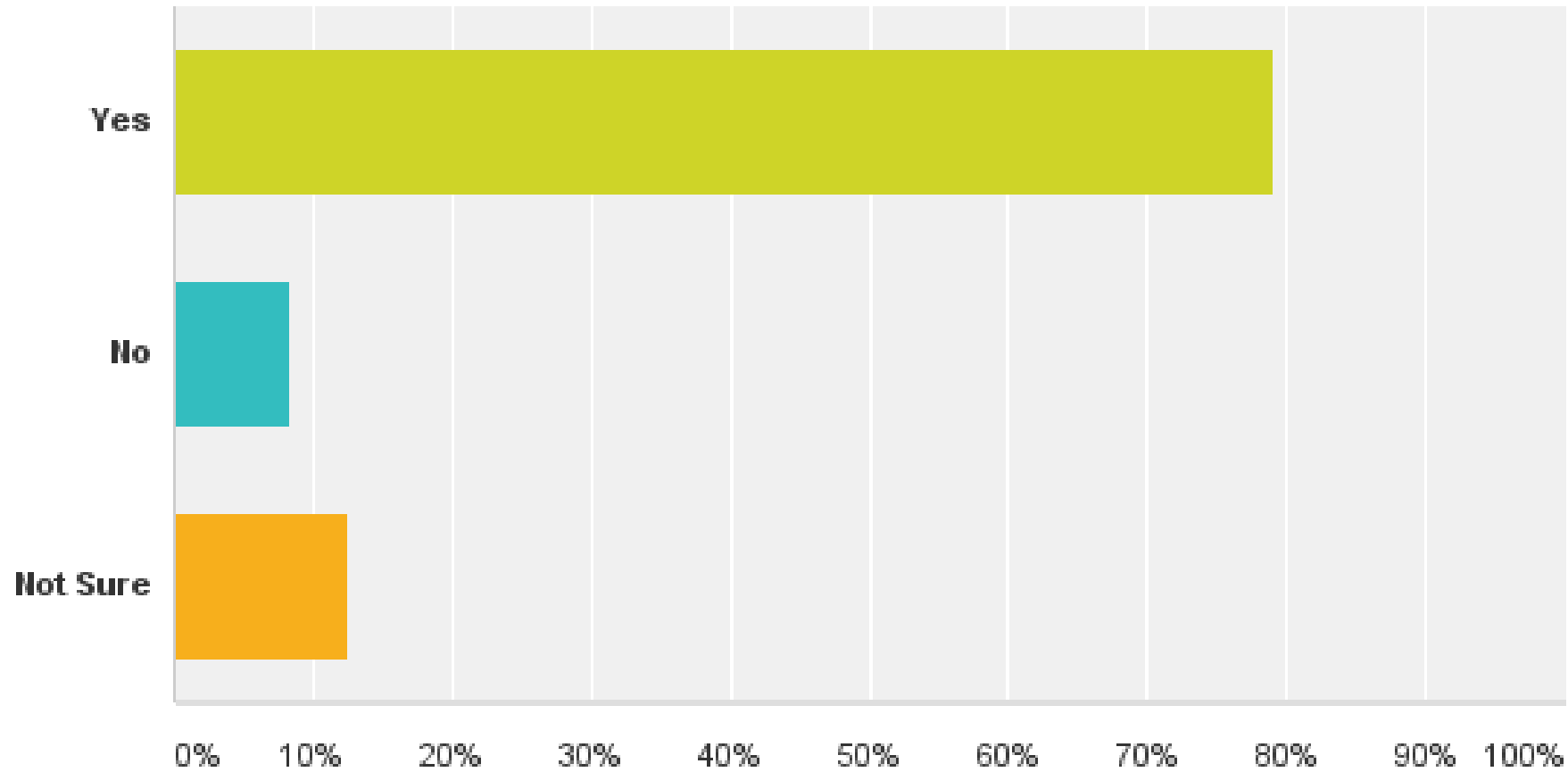
Do you know what amount of your work is reliant upon funds from privately donated sources?



How much?

From very little to 100%

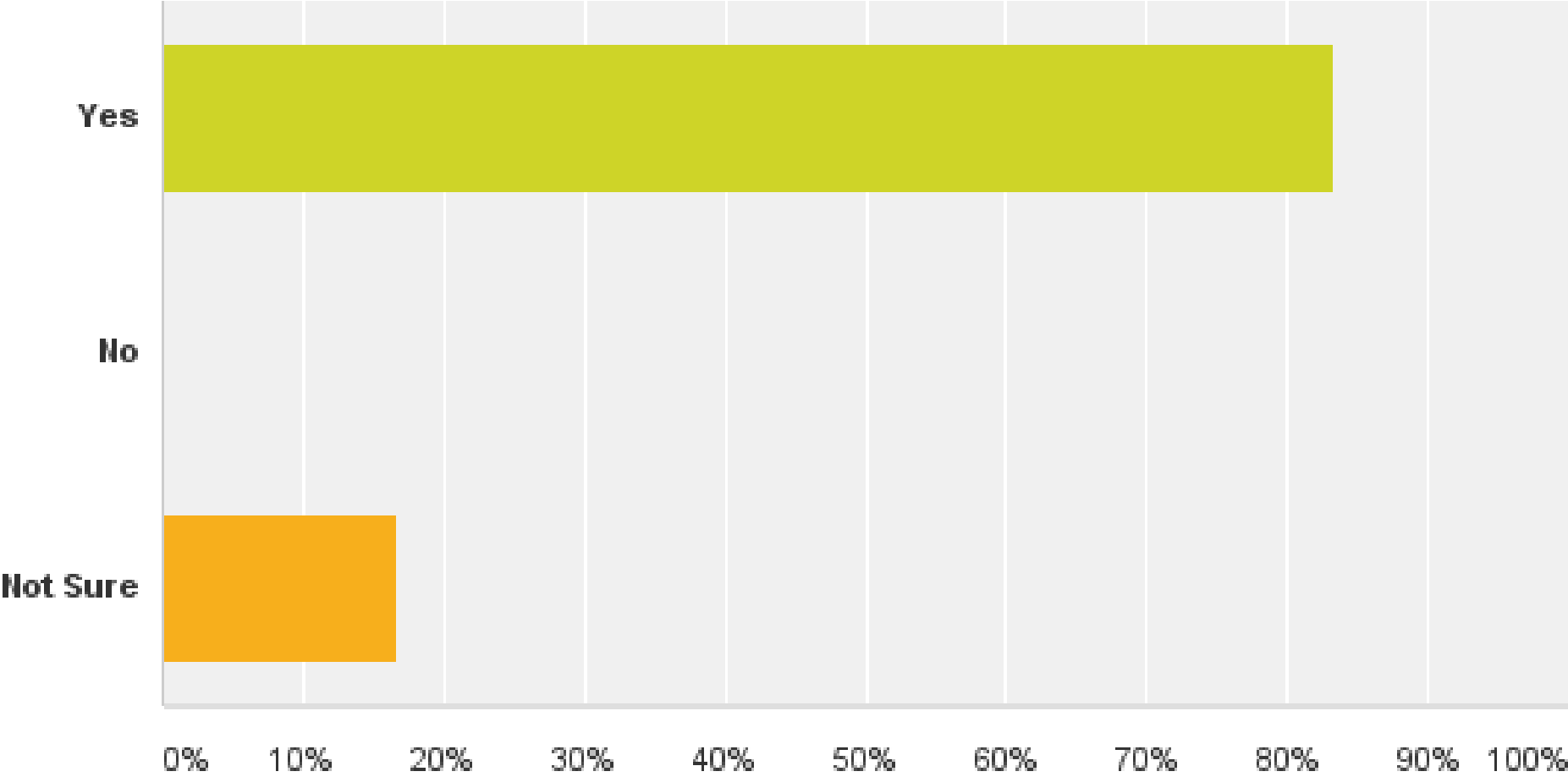
# Do you have a role in helping secure or re-secure those funds?



# Your Role in Fundraising:

- Development Staff
- Communications and marketing
- Grant writer
- Limited; I create connections

# Would you like to be more supportive of fundraising efforts?





# Comments:

YES!



- I'd like to do more
- I am always looking for ways to be more supportive of fundraising
- I'd like our fundraising efforts to be efficient and would like new ideas to implement.
- I'm always happy to help with what is needed
- The future of my unit depends on it
- I think I could add a lot of value to the fundraiser's efforts
- I could have a positive impact on those efforts
- Better security for my department, diversification of resources
- Fundraising is an increasing need of staff
- I'd like to raise funds directly

What fundraising  
knowledge  
challenges  
do you have?

- How to know when to move past cultivation to solicitation and the right amount to ask
- Feel like I'm flying by the seat of my pants
- Starting conversations, reaching out to appropriate people, utilizing and connecting to our alumni base
- What to do beyond letters, social media and special events.
- Getting to "over-asked" donors

## Fundraising knowledge challenges (continued)?

- I feel uncomfortable asking for money.
- Don't know capacity of potential donors.
- Not knowing who/what to target; don't have a "sexy product" to promote
- How to solicit major donors - what are the steps to prepare and steward after, and best ways to keep those donors engaged between asks?

# Who is helping you fundraise?

- Development staff x 13
- Colleagues x 10
- Advisory board x 4
- Department head x 2
- Supervisor x 2
- Volunteers x 2

Anything else you  
would like us to  
know?

**My Development Officer  
is outstanding!!!**

And....

We're off!

# 'Cultivation'

A wide-angle photograph of a lush green agricultural field, likely a vineyard or a similar crop field, with rows of plants stretching towards the horizon. The sky is bright blue with soft, white clouds. The overall scene is bright and clear, suggesting a sunny day.

**Sowing the seeds of loyalty,  
and financial support**

# 'Cultivation' ~ sowing the seeds of financial support

- Best practice in the world of fundraising
- Loyal relationships for the organization/project
- Connect say thank you funders, let them know how things are going.
- Be thinking about the NEXT round of funding!
- 60/40 chat rule...



# Your Cultivation Plan

E-blast monthly, 5 donor phone calls, 5 donor lunches/year...

**‘Make it manageable and make it happen!’**

# Sample Cultivation Plan

Refer to Handout

And... umm... what exactly would I SAY?!

Refer to Handout

Culture of Philanthropy  
& Art of the Ask

“Hi Jane, this is Susan Smith from the U of A Lavender Pachyderm Research Project.”

“Great, thank you! How are you and Bob? Last we spoke you were off to Tahiti....”

“We are so grateful for your elephantine concern and the support you provide. Our work would not be as in-depth without your funding. I’d love to get together and update you on our goings-on... Things are always exciting on the elephant front! What does your schedule look like in the next week or two?”

# The UNusual Suspects

- There ARE more than six major donors to the University of Arizona!
- Connection and capacity
- Remember: Grants for Lunch's DIY Prospect Research podcast online
- Vet them for your fundraising team



# Vet them how...?

Don't call development officer because  
a student's parents drive a BMW.

BUT

if a student says, 'My parents paid \$500,000  
to have my high school gym redone  
so that I could participate...'

Then yes, please call...

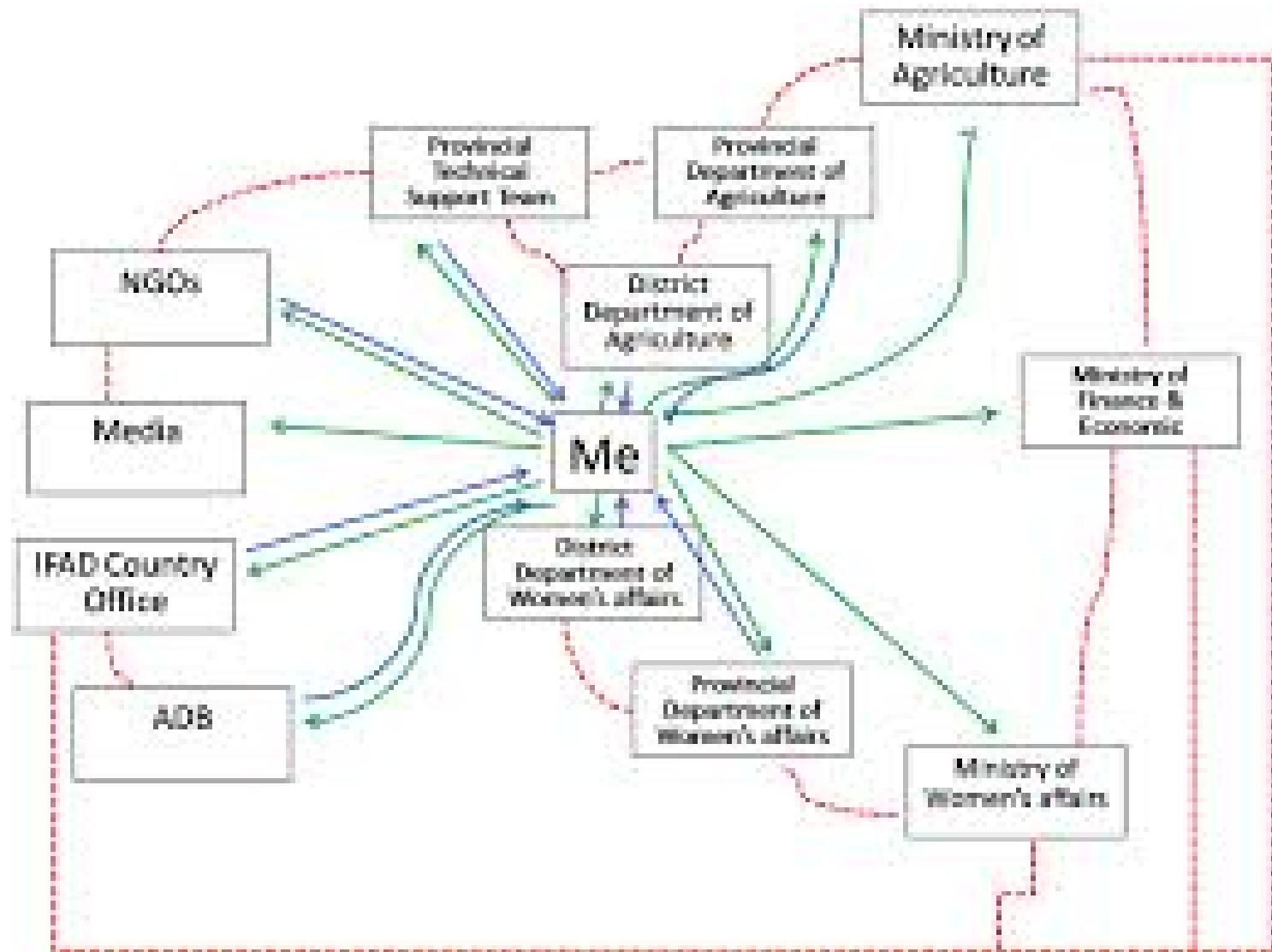
It happens!

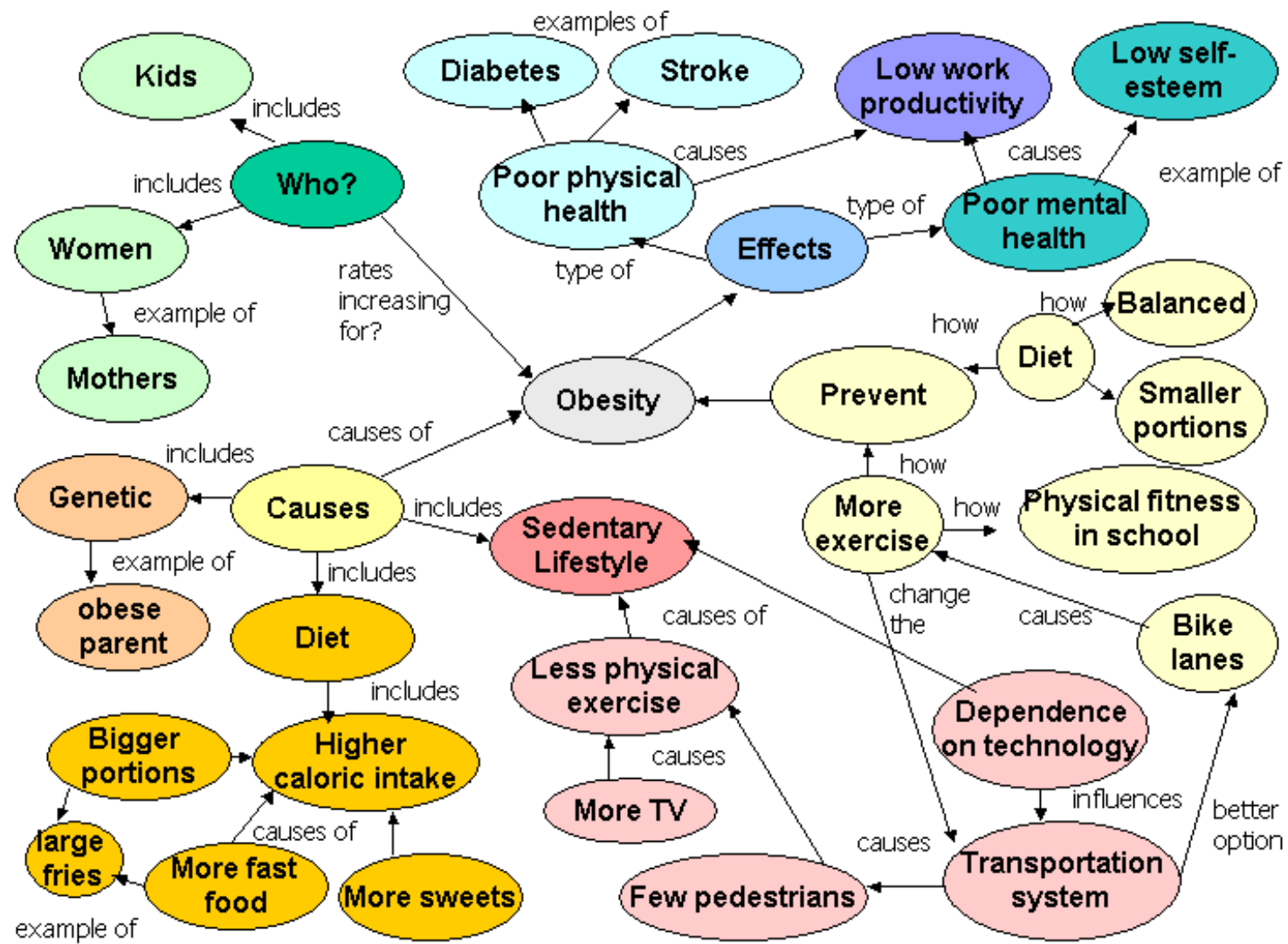
Real life examples

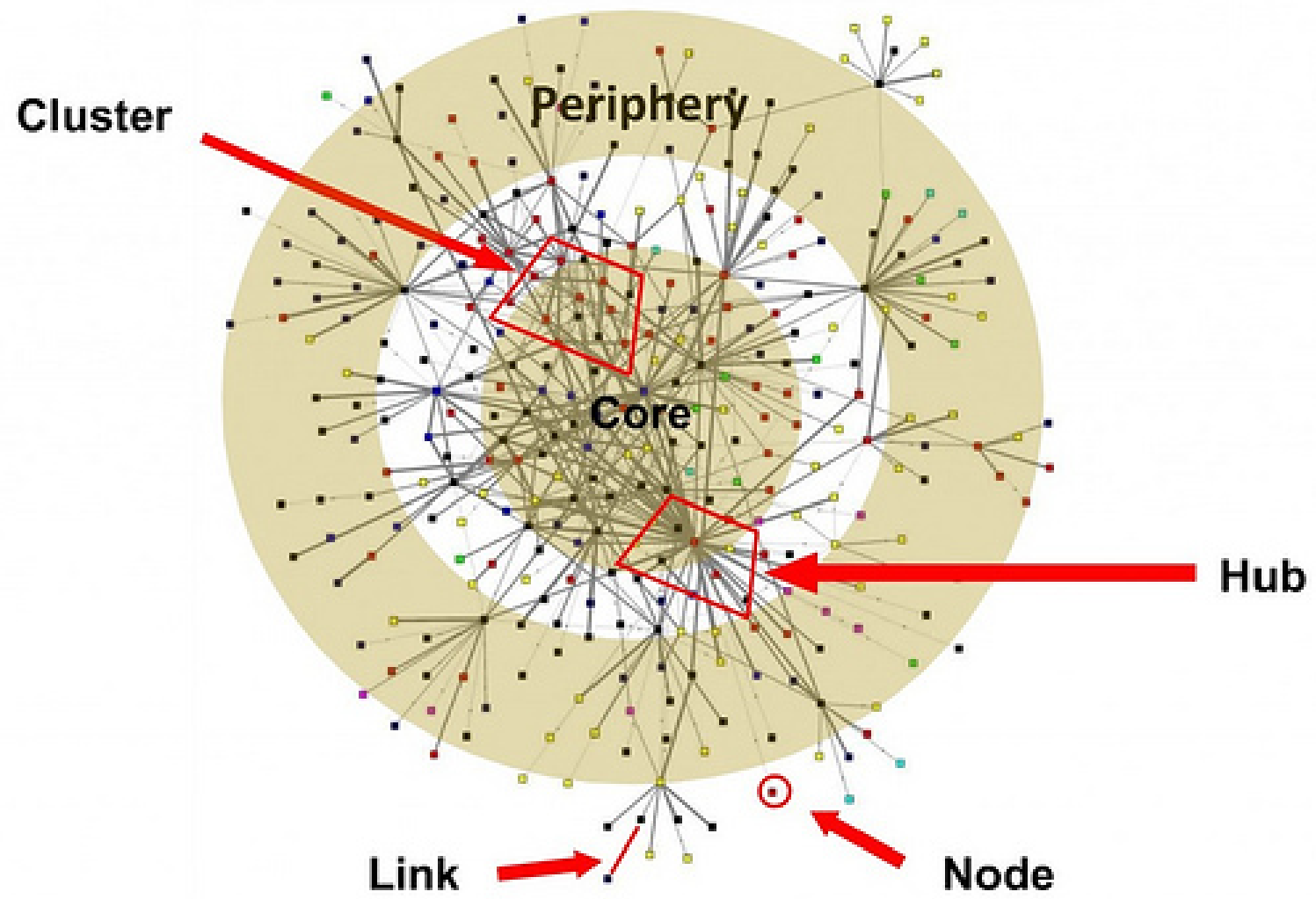
Relationships, Relationships, Relationships...

**‘Relationship Mapping’**









Yeah..... no.

Spreadsheets  
vs.  
meaningful connections

# RELATIONSHIP MATRIX

Prospect	Date/Action/ Project	Date/Action/ Project	Date/Action/ Project	Date/Action/ Project	Date/Action/ Project	Date/Action/ Project	Date/Action/ Project
	ID/Research	Cultivate	Solicit	Acknowledge	Engage	Stewardship	Stewardship
<b>Deborah Dale</b>	<p>Jan. 1, 2016 Research capacity, connection, is she alum, her partner, her child? Etc.</p> <p>Utilize linked-in, social media and Foundation/Gift Center for donor history</p> <p>Add to e-blast</p>	<p>On-going E-blast monthly</p> <p>Send periodic updates on news re: area of interest.</p>	<p>Mar 15 Call to schedule lunch/ Discuss Purple Elephant project.</p> <p>Ask for support.</p> <p>Hand-write Thank You letter for a) meeting and b) either making gift or considering gift.</p>	<p>April Call thank again, update on any new developments.</p> <p>Make sure donation is acknowledged by dean or college.</p>	<p>May 15 Send update on Purple Elephant Project</p>	<p>July Sched tour of Purple Elephant Project/Ask for Contribution</p>	<p>Dec. Update send holiday card</p>
<b>Joe Smith</b>							
<b>Jane Doe</b>							

# From Cyber Networks to Trader Joe's

Who do YOU know and  
WHAT/WHO do they know,  
and HOW can they connect you...  
and vice versa

## Online Networks/Resources

- University of Google
- LinkedIn
- Facebook!



**LinkedIn**

**Google**

And get out there  
and get yourself connected!

# Raise your profile!

- Internally & externally, on campus and off
- Build new relationships, expand your circle of influence
- Be a solution
- Working with YOUR unit's core supporters, in conjunction with your leadership...



So... how do gifts go from \$500 to \$5,000...?  
\$5,000 to \$50,000...? And on and on...

## RELATIONSHIPS

- Cultivation never stops!
- UNusual suspects ~ connection and capacity
- See & be seen, NETWORK!
- Make a plan
- Script yourself and practice

Q

&



Your Passion. Our Experience.



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