



SAR

**BOARD MEETINGS
AUGUST, 2015**

OVERVIEW

FRIDAY

Board Role in Development

Current Landscape for Raising Funds and Recent Trends

Strengthening Case for Supporting SAR

Defining our Audiences and How We Engage Them

Assessing SAR's Competition for the Philanthropic Dollar

Strategies for Building Membership, Annual Giving, and
Special Gifts

OVERVIEW

SATURDAY

Clarifying Roles in Development: The Board Role and the Staff Role

Some Thoughts on the Art of Asking
Our Roles in Cultivation and Stewardship

Action Items

OUTCOMES

Board engagement in strengthening the case for support

Understand Roles and Responsibilities

Define specific Actions or Steps to be more successful in raising funds for SAR?

Other?

BOARD'S ROLE IN FUNDRAISING

Please close your eyes.

JERRY'S INSIGHTS INTO BOARDS

- Getting 100% to participate in soliciting funds rarely happens!
- BUT those who don't like “asking” CAN engage in *donor development*
- Board members become stronger in development when given opportunities to do things they feel confident about

I WISH I'D SAID THAT!!!

“Your Board is your destiny.”*

Whatever is past, is past.

Whatever SAR's journey has been is merely preamble.

Your Board is the precursor to where SAR will end up ... presently and in the future.

*Quote from Jerald Panas

THE BEGINNING

**Write down two reasons
you're involved with SAR.**

THE BEGINNING

This is the first step in becoming a better fundraiser for SAR – knowing why SAR matters to you!

THE KEY ROLES OF THE BOARD

MISSION

LEADERSHIP

RESOURCES

VALUE OF THE BOARD

Legitimizes the cause

Increases the stature of the organization

Provides knowledge beyond staff resources

VALUE OF THE BOARD

Makes meaningful gifts to serve as example

Extends the philanthropic reach

Demonstrates selflessness

Bridge between organization and community

BOARD DUTIES IN FUNDRAISING

Among top 3 personal philanthropic priorities

Identify and evaluate prospects

Cultivate and solicit gifts

Host fundraising or stewardship events

BOARD DUTIES IN FUNDRAISING

Support fundraising programs and events

Offer personal acknowledgments

Provide leadership and actively advocate

Ensure funds are used as designated

SUCCESSFUL FUNDRAISING REQUIRES...

Vision and Mission

Strategic Planning

Case for Support

SUCCESSFUL FUNDRAISING REQUIRES ...

Leadership (Board and CEO)

- Understanding and implementing principles of effective development
- Participation
- Oversight

Development Staff

Strategy/Development Plan

UNDERSTANDING YOUR OPPORTUNITIES YET ANOTHER “AAA!”

Ambassador

Advocate

Asker

Original Concept from Kay Sprinkel Grace

UNDERSTANDING YOUR OPPORTUNITIES

Ambassadors – build relationships

Advocates - make the case – “Sell”

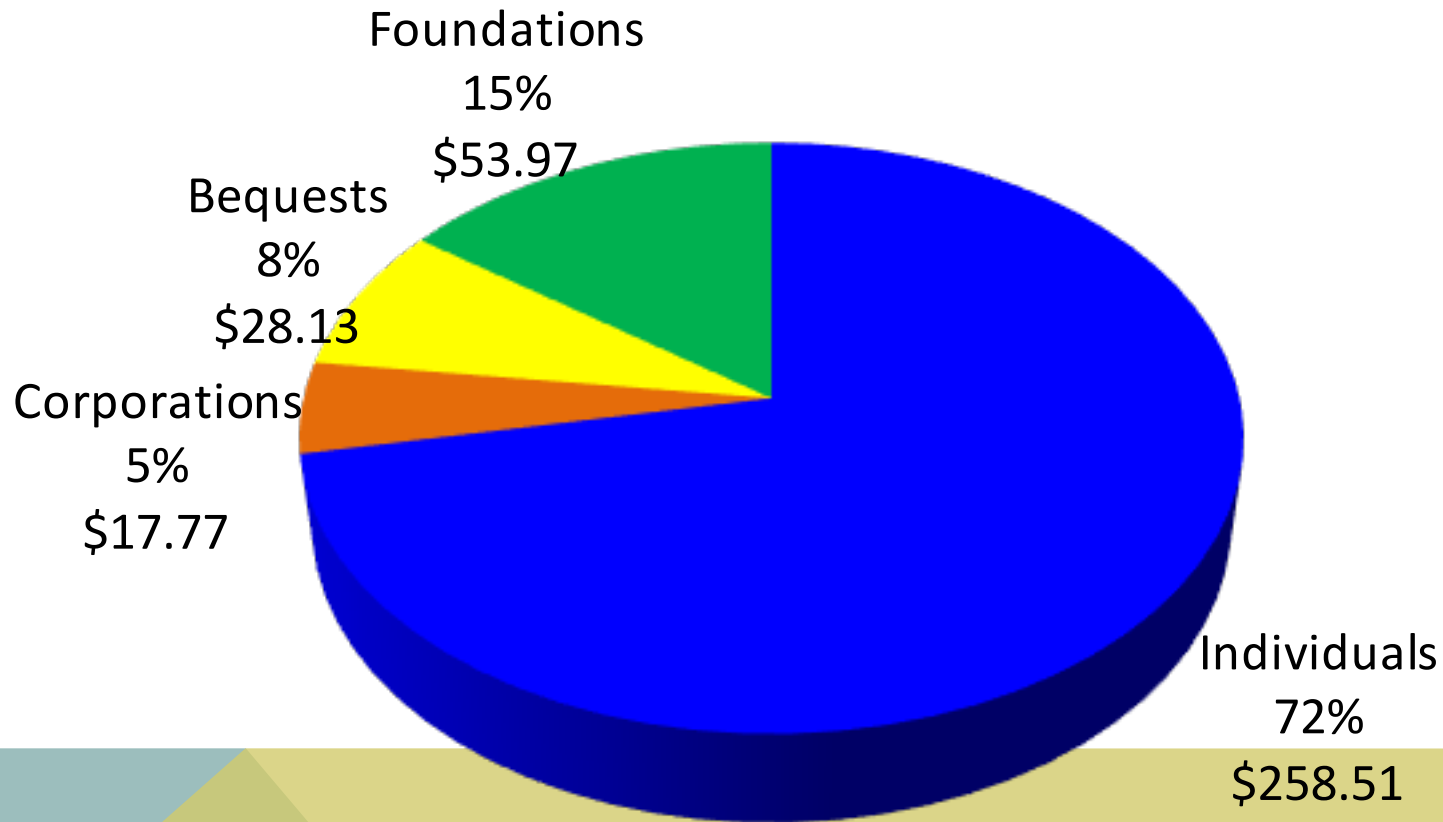
Askers – solicitors & closers

DISCUSSION

**What do each of these need
in their “tool kits” in order
to be successful for SAR?**

LANDSCAPE FOR RAISING FUNDS FOR SAR

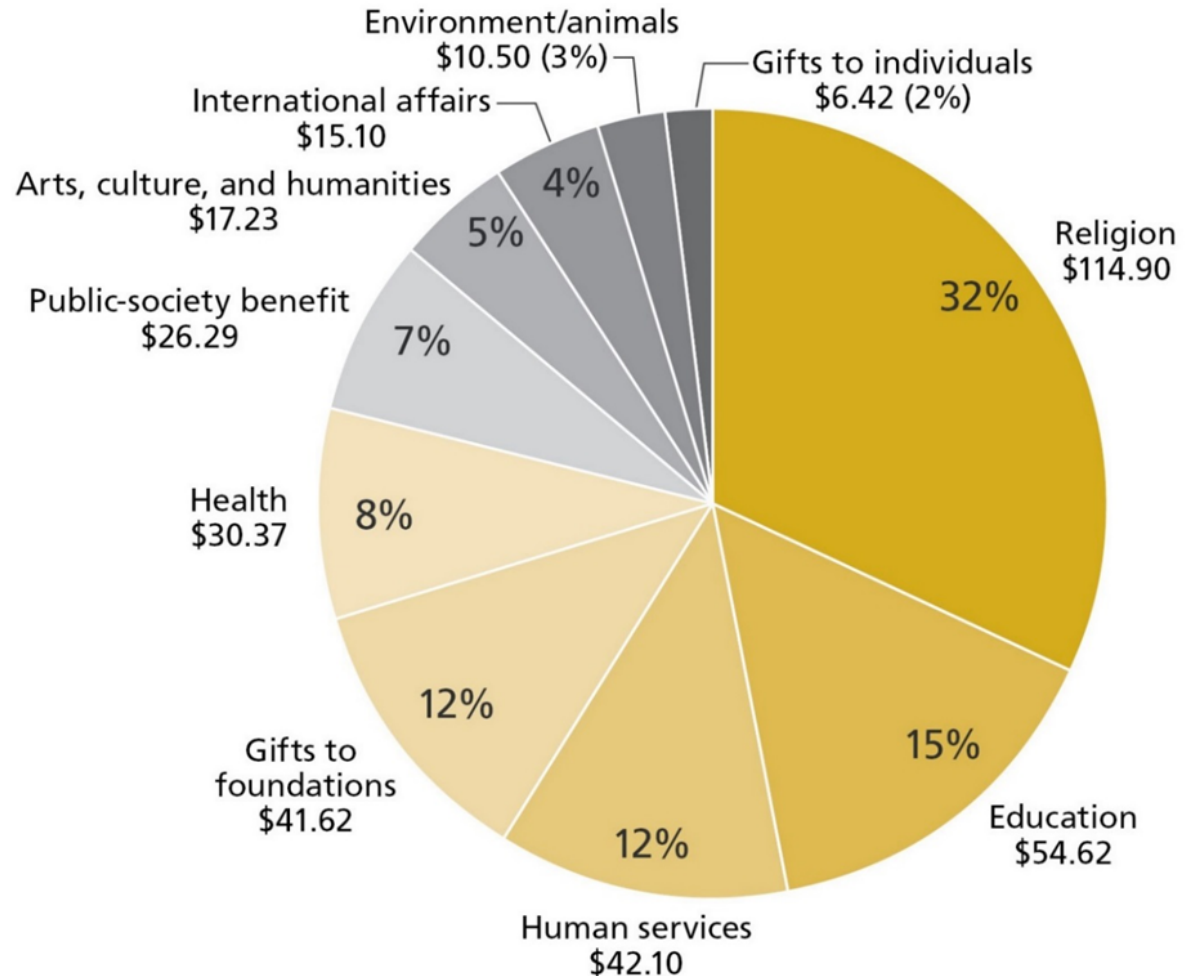
2014 CONTRIBUTIONS: \$358.38 BILLION BY SOURCE (IN BILLIONS OF DOLLARS – ALL FIGURES ARE ROUNDED)



2014 CONTRIBUTIONS:

\$358.38 BILLION BY TYPE OF RECIPIENT ORGANIZATION

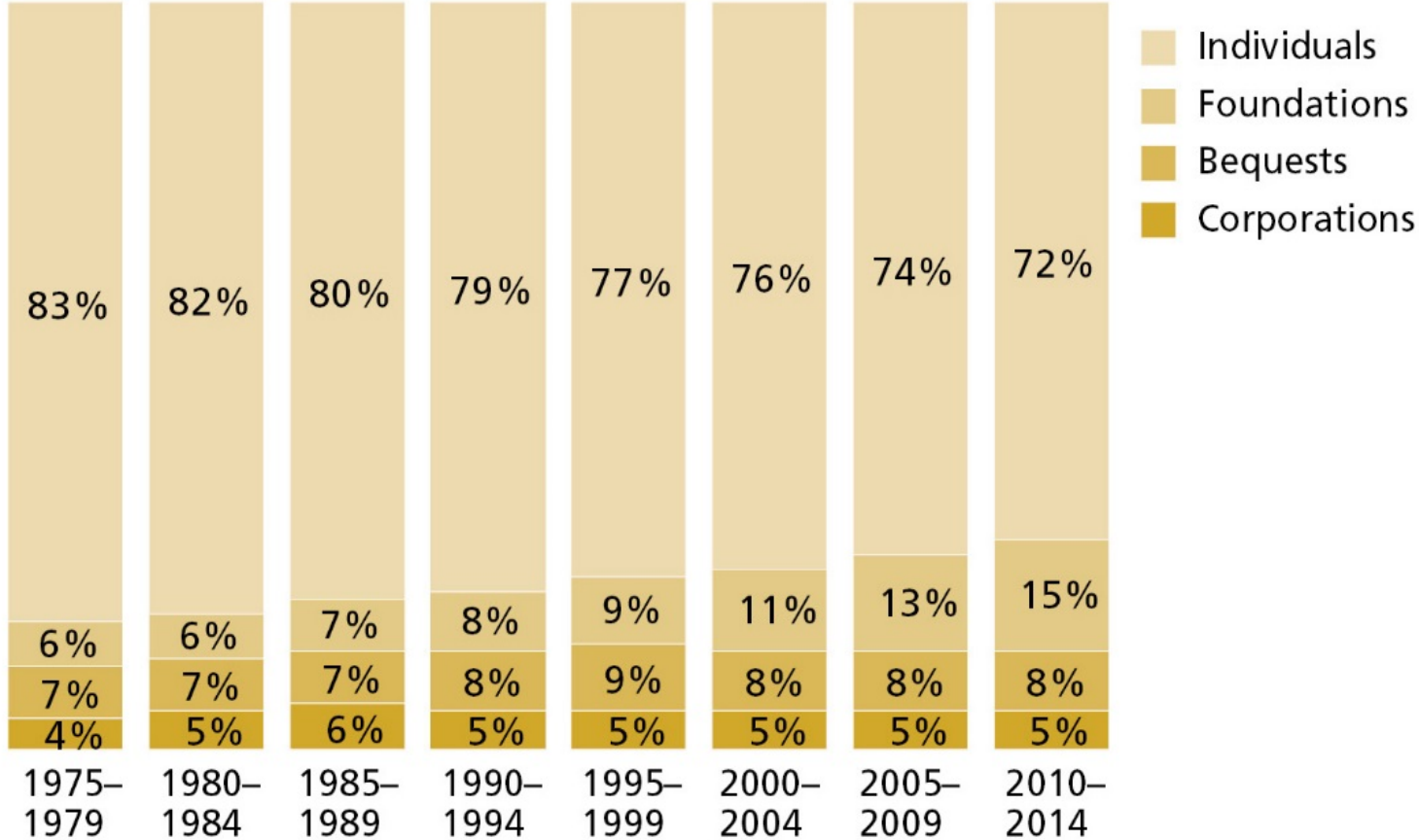
(IN BILLIONS OF DOLLARS – ALL FIGURES ARE ROUNDED)



GIVING BY SOURCE:

% OF THE TOTAL IN FIVE-YEAR SPANS, 1975-2014

(IN INFLATION-ADJUSTED DOLLARS, 2014 = \$100)



Giving USA uses the CPI to adjust for inflation.

PHILANTHROPY TODAY

- Wealth is more concentrated
- 50 wealthiest donors gave more than \$10 billion
- 1/2 of giving comes from top 3%

PHILANTHROPY TODAY

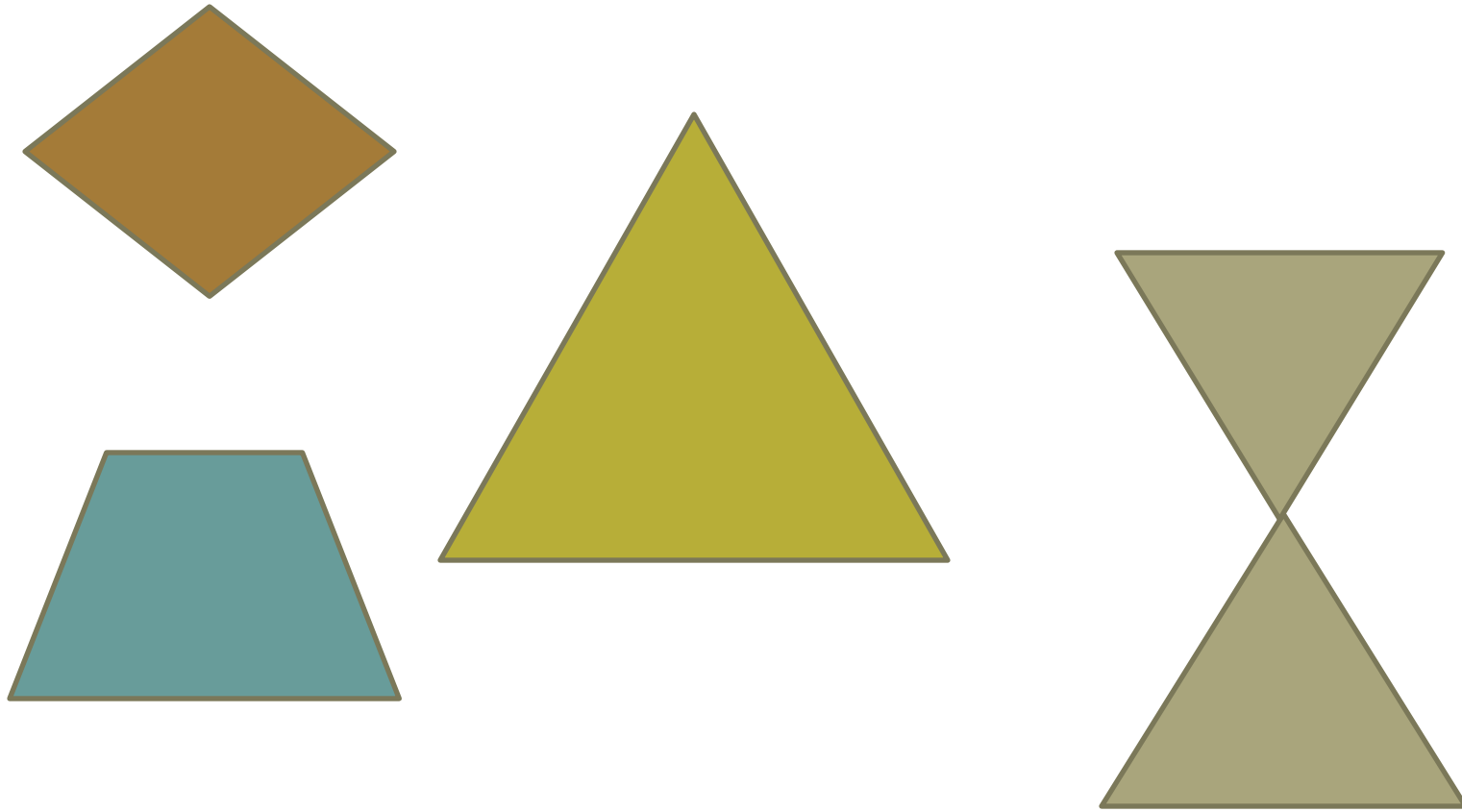
- Middle class gives larger % of their own wealth
- Boomers will soon control 70% of wealth and less generous than parents
- Women give more (by 89%) after age 50

PHILANTHROPY TODAY

- Giving is becoming more racially and ethnically diverse
- Millennials demand more proof of effectiveness
- Outcome-oriented Philanthropy

**TRENDS IN RAISING FUNDS FOR
NONPROFITS**
FUNDRAISING 101

1. The “geometry” in raising funds is changing...



RECENT TRENDS IN FUNDRAISING

RECENT TRENDS IN FUNDRAISING

2. You must have a credible/sustainable business plan

3. You must be able to document

- your success
- your vision for your future
- real needs

“Major donors give to organizations that have needs ... not needy organizations ...”

RECENT TRENDS IN FUNDRAISING

4. The pitch for endowment needs greater clarity...
5. What you raised in your last campaign is NOT the minimum goal for the next campaign
6. Pledging has changed for some donors

RECENT TRENDS IN FUNDRAISING

7. Competition, competition, competition...
8. Staff turnover rates are increasing
9. Patience is not just a virtue; it is an absolute necessity

RECENT TRENDS IN FUNDRAISING

10. Donors tightening the focus of their philanthropy
11. Technology plays increasing role in enabling donors to give – primarily lower level and entry level donors
12. Printed material going virtual.

QUESTIONS?

Which of these trends do you sense is a strong challenge or opportunity for SAR in its fundraising?

DEFINING SAR'S AUDIENCES AND HOW WE MIGHT ENGAGE THEM



The philanthropic process is more about *relationships* than simply money.

SMALL GROUP DISCUSSION

**What are the various
constituent groups related to
SAR?**

OUR CONSTITUENTS BY THE NUMBERS

Alumni	1,719
Board Members	24
Former Bd. Members	95
Individuals	1,735
Friends	1,087
Corporations	76
Foundations	118

STRENGTHENING SAR'S CASE FOR SUPPORT

DISCUSSION

- 1. What would be different in the world today if SAR ceased to exist?**
- 2. What would be different in Santa Fe today if SAR ceased to exist?**
- 3. Given those reasons, why should someone contribute philanthropically to support SAR?**

TAKEAWAYS FOR TODAY: ACTIONS & ASSIGNMENTS



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