



**SAR**

**BOARD MEETINGS  
AUGUST 15, 2015**

# OVERVIEW

## SATURDAY

Strategies for Building Membership, Annual Giving, and Special Gifts

The Board Role and the Staff Role in Development

Some Thoughts on the Art of Asking, Cultivation and Stewardship

Action Items

## ACTION STEPS

- President will draft vision for SAR
- Staff will continue to work on database\*
- Staff will address rebuilding of website\*
- Discussion around Giving Levels & Membership
- Other?

\*will need additional resources

# CONSTITUTENTS

Alumni

Most recent donors

Past donors

Visitors

Docents/Volunteers

Interest Groups around speakers

Friends of our friends

# ASSESSING NEXT STEPS TO RAISE FY 2017 DOLLARS

\$100,000+	1
\$50,000-\$99,999	2
\$25,000 - \$49,999	1
\$10,000 - \$24,999	10
\$5,000 - \$9,999	9
\$2,500 - \$4,999	11
\$1,000 - \$2,499	17
\$500 - \$999	19
\$250 - \$499	26
\$100 - \$249	87
Under \$100	92

## Annual Giving 2015

\$5000+	1
\$2,500	22
\$1,000	8
\$500	11
\$250	38
\$150-\$180	43
\$100	4
\$80	32
\$70	140
\$50	27
\$40	144

## Memberships 2015

# BASIC DEVELOPMENT STRATEGIES

Step 1:

Conduct Board phase

Step 2: Develop a targeted Major Donor solicitation plan for Pres. and Board



# BASIC DEVELOPMENT STRATEGIES

Step 3:

Focus on Major Donor Retention

Step 4: Draft plan to encourage donors (& members) to move up one level

# BASIC DEVELOPMENT STRATEGIES

## Step 5:

Review any lists you have of attendees from previous year's events

- Categorize by potential giving levels
- Solicit for appropriate level support

## Step 6:

Develop plan for active solicitation for intro level commitment at speaking events

# SUGGESTED DEVELOPMENT CALENDAR

## Board Solicitation

(Now – September)

- Create a Letter of Intent with Comprehensive Giving Opportunities for the FY
- Prepare a Stewardship Report on Board Giving
- Recruit and Establish Assignments for a Board Development Committee
- Solicit Board Members in Person
- Seek 100% Participation

# SUGGESTED DEVELOPMENT CALENDAR

## Major Gifts Solicitations (Now – September)

- Former Board Solicitation
- President's Council
- Annual Donors of \$1,000+
- Bandelier Society \$1,000

# SUGGESTED DEVELOPMENT CALENDAR

## Annual Fund

(September – December)

### A. Personal Visits to Seek Upgrades

- Members – Donors (Under \$1,000)
- Prior Members – LYBUNTs and SYBUNTs
- Event Attendees – prioritized

### B. Direct Mail

(November)

- Members – Donors (Under \$1,000)
- Prior Members
- Event Attendees – segmented

# SUGGESTED DEVELOPMENT CALENDAR

Review Direct Mail Results (December)

Phone Solicitations by Staff and/or Volunteers  
(December/Year End)

Personal Attention  
(Ongoing)

- Telephone New Donors/Members - Thank you
- Provide info on various ways to give:
  - Stock Gift Info
  - IRA Charitable Deduction Rollover (if approved)

# THOUGHTS ON SAR PROSPECT CULTIVATION

## CULTIVATION

Primarily, it's an education process:

- Sharing factual information about SAR
- Sharing your passion
- LISTENING
- Building a personal relationship.

Any cultivation activity **MUST** include good follow-up.



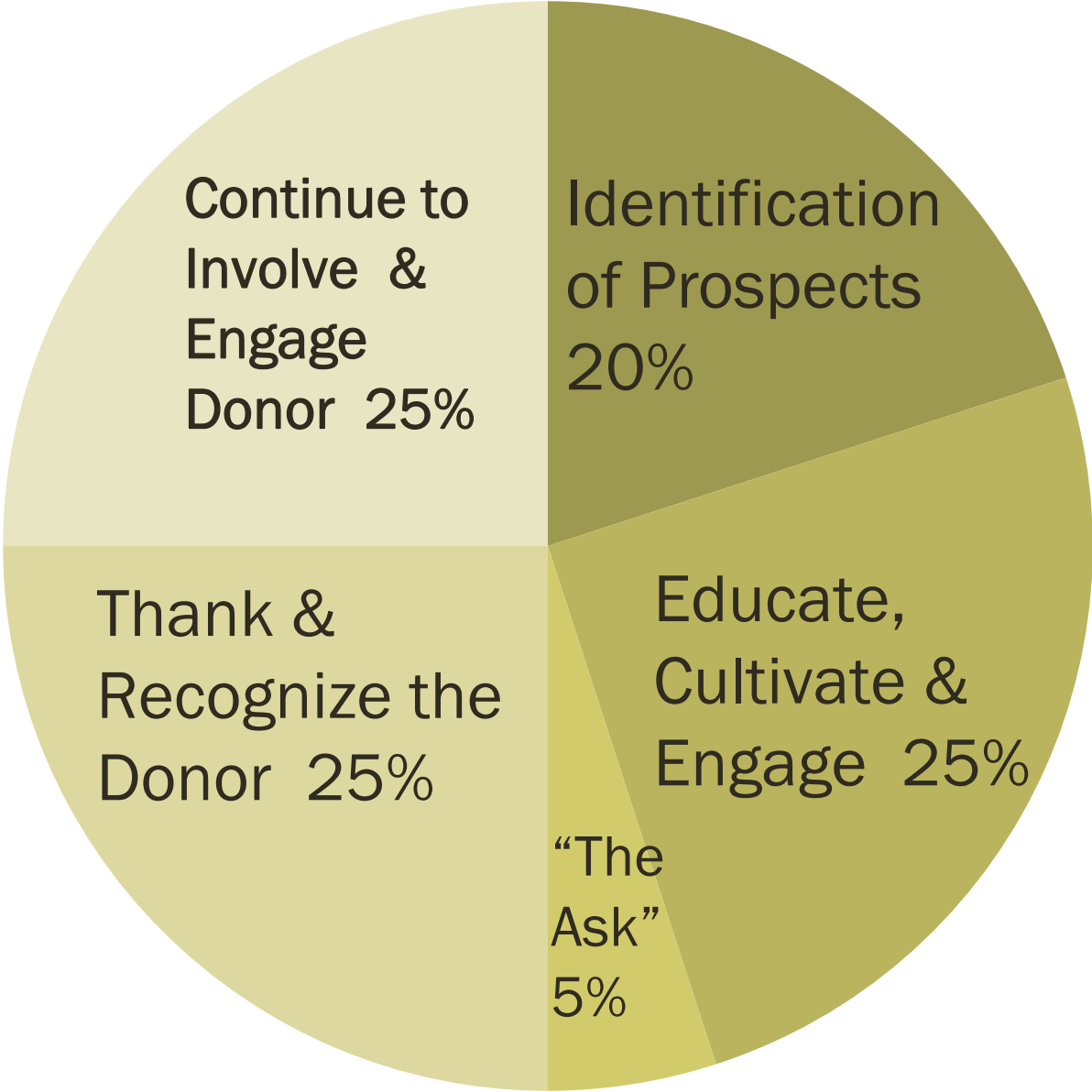
## CULTIVATION

Follow up can include:

- Invitation to another event
- Personal note
- Materials
- Phone call
- Lunch with President
- Appointment for a solicitation meeting
- Other?

**THOUGHTS ON THE ART OF  
ASKING FOR \$\$\$**

# STAGES OF SOLICITING MAJOR GIFTS



## ART OF ASKING

Personal solicitation rarely comes naturally!

- You're asking before your offered
- You're talking about money
- You're pressing on personal matters

**What are the other anxieties of “asking?”**

## ART OF ASKING

Understand your role as a fundraiser – a “developer”

- Facilitator/enabler vs. beggar
- Professional vs. friend
- Team player/broker vs. soloist.

# ART OF ASKING

## Before the Visit/Call

- Learn as much about your prospect as possible
- Identify a possible linkage with SAR
- Prepare some talking points

## ART OF ASKING

During the visit

- Warm up conversation
- Transition to why you're involved
- Talk about shared values
- Engage and LISTEN

Make the ask

*“We’d like to invite you to consider a gift this year of \$\$\$...” or “We’d like to invite you to join the President’s Council this year...”*

## ART OF ASKING

Remember – You rarely know all of the issues until you ask for the gift!

- They may not feel connected
- Personal circumstances
- Financial circumstances
- Other outstanding commitments
- Other philanthropic priorities



## ART OF ASKING

### Overcoming Objections:

- “I have to talk with my spouse.”
- “I’m over committed right now.”
- “I can’t make a decision right now.”
- “I’m drawing back on the number of organizations I support.”
- “I can’t give at that level.”
- “No.”

**Describe a good solicitation experience in which you've been involved – either as the donor prospect or as the solicitor.**

## DONOR CENTRIC APPROACH

### THANK

"Glad to meet/see you. I want to thank you for all the support you've given SAR. It means a lot to us."

### SHARE YOUR CONNECTION:

"I'm a board member. I got involved because...."

### PROBE FOR INTEREST:

"I'd like to ask you a question . . . what is it that has attracted your interest with SAR [or that made you decide to give a contribution/grant to us]?"

**DONOR CENTRIC APPROACH**  
**ASK FOR ADVICE:**

"If there is ONE thing you think SAR might do to enhance your experience, what would it be?"

**THANK AGAIN**

"Again, thank you for your involvement with SAR."

## POSSIBLE SOLICITATION APPROACH

### THANK

“ Thank you so much for attending the lecture last night. It means a lot to SAR to have you present for our programs like that one.”

### SHARE YOUR CONNECTION:

“As a Board member, we’re reaching out to individuals such as yourself who’ve attended SAR lectures in the past to seek your advice and to ask for your support.”

## SOLICITATION APPROACH

THE ASK:

WHAT DO YOU SAY NOW?

## SOLICITATION APPROACH

### THANK YOU

”Thank you for considering this. If there’s any additional information I can provide....May I follow up with you next Tuesday?”

### THANK AGAIN

“Again, thank you for your attending our SAR lectures.”

# THOUGHTS ON FUNDRAISING ROLES – BOARD & STAFF



## BOARD

Approves budget

Agrees on programmatic goals (and how they will get financed)

If extra \$\$\$ is needed, agrees to raise it OR to ensure that staff is equipped with the resources to do it (Both is the best approach!)

Approves necessary policies

Clarifies Board members personal responsibility to contribute

## INDIVIDUAL BOARD MEMBERS

Personal giving

Trained to assist in raising funds as requested

Provides names of potential donors

Willingness to accompany the President on solicitation visits

Sign fundraising and stewardship letters

Cultivate/Recommend potential new members

## DEVELOPMENT COMMITTEE

Drafts necessary fund development policies

Board-level motivator to assist in engaging other members in fundraising

Works closely with the Development staff to develop the Annual Campaign Plan and timeline for presentation to the Board

May have specific task forces working in areas such as:

- Annual Giving
- Planned Giving

## PRESIDENT

Primary representative of the organization

Truly, the “chief development officer”

Spends significant time on cultivation of major donors and public relations in general

Teams with Board members on important calls

## DEVELOPMENT STAFF

Dev. Director is the coordinator of the overall fundraising plan

Determines the best way to utilize the President's time in fundraising

Collaborates with Board to determine the contacts the Board members have.

Hires and supervises the other development staff.

# WHO DOES WHAT? – A SUMMARY

Board Responsibilities	Staff Responsibilities
Approve annual budget and fundraising plan	Prepare plans with goals and objectives based on strategic plans
Approve fundraising policies	Implement fundraising plans based on fundamental principles
Help identify prospects; Participate in face-to-face meetings; Attend or host special events; Stewardship	Donor plan for identification, cultivation, solicitation, stewardship.
Make a personal gift	Handle all administrative tasks
Monitor performance	Prepare regular reports
Ensure funds are used correctly	Maintain good stewardship through regular communication

## WHAT THE BOARD EXPECTS FROM STAFF

Let us know if there is a problem that concerns us

Inform us specifically how we can help

Do not allow any “surprises”

Encourage “ownership”

## WHAT STAFF EXPECTS FROM BOARD

When a commitment is made that it will be carried out

Board members' attendance at special events and programs

Board members' special skills available when needed

Financial support from all members



# WRAP UP AND AGREEMENT ON ACTION STEPS



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