

LOCAL GRANTS

- oCommunity foundations
- oCorporate foundations
- oLocal banks and businesses



THINGS TO CONSIDER

- oWhat's your project?
- oWho will write the grant?
- oDo you need a cash match?
- oDo you have an annual budget and/or audit prepared?
- oKnow the application deadlines



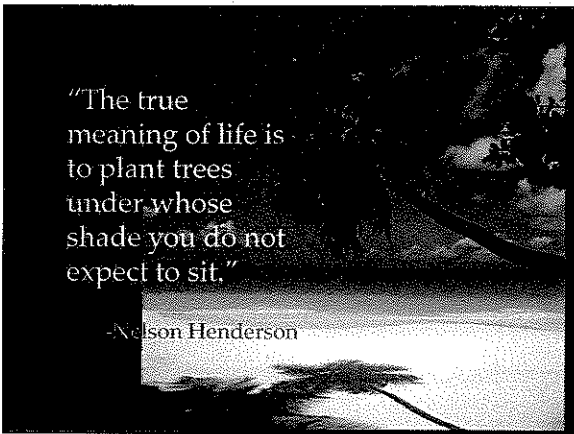
THE APPLICATION

- oSuccinct summary
- oNarrative - focus on **OUTCOMES**
- oIdentify involved parties *before* including them in narrative
- oHave a realistic budget



From Cultivation to Stewardship

{ Getting and keeping your donors



1. Planned Giving


- The ongoing and long term effort to identify, cultivate and assist donors who have the capacity and desire to make Fairfield Medical Center part of their estate plan.

2. Major Gifts

- Gifts raised through capital campaigns, endowment campaigns, or specific program campaigns that fund major pillars of Fairfield Medical Center
- Gifts from major donors are currently those in excess of \$100K.

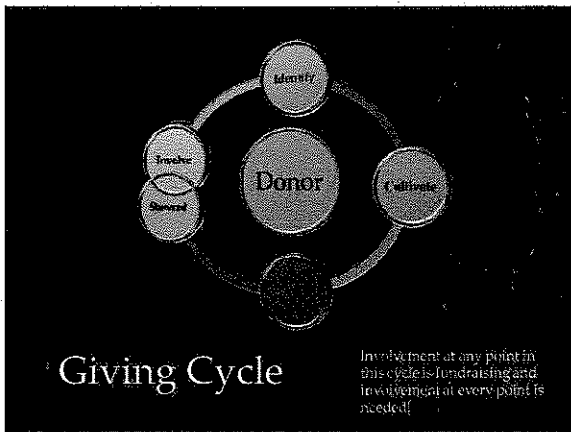
3. Annual Giving

- Gifts raised each year to sustain the operations of Fairfield Medical Center. Annual giving primarily includes unrestricted gifts, but may include gifts for specific programs.



Fairfield Medical Center and
Fairfield Medical Center
Foundation





- ↳ Compelling case
 - ↳ Logical campaign plan
 - ↳ Prospect identification, research and review
 - ↳ Form a cultivation team and develop a cultivation plan
 - ↳ Relationship-building
 - ↳ Determine gift request
 - ↳ When the time is right, have the right person ask the right prospect for the right amount
 - ↳ Continue the love!
- Steps to Success**

↳ **Constituency Networking**

- ⌘ board members
- ⌘ volunteers (including past Board presidents)
- ⌘ current donors and past donors
- ⌘ families/individuals served

↳ **Interaction in your community**

Prospect Identification

- ⌘ Donors are looking to make an impact
- ⌘ Number of donors on decline / total funds donated on rise
- ⌘ Major gifts are coming from
 - ⌘ Individuals, businesses and families
 - ⌘ Loyal and consistent annual donors
 - ⌘ New prospects
 - ⌘ Entrepreneurs
- ⌘ Major gifts no longer limited to capital campaigns
- ⌘ Competition for major gifts has never been tougher

Trends

↳ **New Generation of Entrepreneurial Donors**

- ⌘ Expect greater accountability
- ⌘ Drawn to solid track record
- ⌘ Want to have say in how gift is spent
- ⌘ Make decisions quickly
- ⌘ Give at a higher level than non-entrepreneurs
- ⌘ Looking for ongoing relationship
- ⌘ Technologically savvy - want internet access
- ⌘ Want the good and bad information

Trends

⌘ About learning what's important to your prospect

- ⌘ Myth: Cultivation creates interest
- ⌘ Reality: Cultivation helps build upon their interests
- ⌘ What else motivates them? Naming opportunities? Tax advantages? Personal satisfaction?
- ⌘ Often about helping donors figure out "how" to make a major gift

Donor Cultivation

- ⌘ MG return on investment worthy of effort
- ⌘ MG success is increasingly important
- ⌘ Donors want to feel valued
- ⌘ Donors want to know how cause meshes with their interests
- ⌘ Cultivation means difference between a gift and the right gift

Why cultivate

"people give for their reasons, not yours"

- ⌘ Incorporate cultivation into your annual plan and budget
- ⌘ Develop specific action plans for each MG prospect
- ⌘ Qualify and quantify prospects and activities

How to cultivate

- ↳ Recognition of previous gifts
- ↳ Collateral materials and publications
- ↳ Hand-written notes and holiday cards
- ↳ Telephone call / e-mail
- ↳ Tours, receptions and events
- ↳ One on one visits over lunch or dinner
- ↳ Congratulatory notes on their achievements
- ↳ Formal face-to-face meetings

Some suggestions

↳ Ongoing cultivation

- ↳ Part of your culture; everyone plays a role
- ↳ Active, pre-solicitation cultivation requires a well thought-out cultivation team
- ↳ Personal friend, peer or business colleague
- ↳ Senior volunteer and/or CEO

Who to involve

↳ It varies

- ↳ Rely on intuition and good judgment
- ↳ Listen, listen, listen
- ↳ Let their questions and body language be your cue
- ↳ Rules of thumb
- ↳ The larger the request, the more cultivation required
- ↳ The newer the donor, the more cultivation required

How much cultivation

→ how much formal cultivation like to talk

→ 20% of donors ≠ 80% of gifts

⊗ D = Do

⊗ Y = You

⊗ D = Do

D / YSY D



"You'll forget what I say,
You'll forget what I do,
You'll never forget
how I make you feel."
⊗ Maya Angelou

The Ask

KEEP IT SIMPLE

- ⊗ Focus on the basics
- ⊗ Every year find ways to add and/or improve

Manage Expectations

↳ Coach your staff regularly on managing expectations with the donor on what is possible.

↳ Better to do a few things REALLY well than a lot of things poorly

Focus on Integrity!

Philanthropy is a
♥ size

Not a  size

Always Remember...

A Donor Bill of Rights

PHILANTHROPY is based on voluntary action for the common good. It is a tradition of giving and sharing that is primary to the quality of life. To ensure that philanthropy merits the respect and trust of the general public, and that donors and prospective donors can have full confidence in the non-for-profit organizations and causes they are asked to support, we declare that all donors have these rights:

I.

To be informed of the organization's mission, of the way the organization intends to use donated resources, and of its capacity to use donations effectively for their intended purposes.

II.

To be informed of the identity of those serving on the organization's governing board, and to expect the board to exercise prudent judgment in its stewardship responsibilities

III.

To have access to the organization's most recent financial statements.

IV.

To be assured their gifts will be used for the purposes for which they were given.

V.

To receive appropriate acknowledgement and recognition.

VI.

To be assured that information about their donations is handled with respect and with confidentiality to the extent provided by law.

VII.

To expect that all relationships with individuals representing organizations of interest to the donor will be professional in nature.

VIII.

To be informed whether those seeking donations are volunteers, employees of the organization or hired solicitors.

IX.

To have the opportunity for their names to be deleted from mailing lists that an organization may intend to share.

X.

To feel free to ask questions when making a donation and to receive prompt, truthful and forthright answers.

DEVELOPED BY:

Association of Fundraising Professionals (AFP)
Association for Healthcare Philanthropy (AHP)
Council for Advancement and Support of Education (CASE)
Giving Institute: Leading Consultants to Non-Profits

ORIGINALLY ENDORSED BY:

Independent Sector
National Catholic Development Conference (NCDC)
National Committee on Planned Giving (NCPG)
Council for Resource Development (CRD)
United Way of America

Adopted in 1993

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