



**OHIO LOCAL
HISTORY ALLIANCE**

Inspire. Connect. Educate.



Strategies for Effective Donor Cultivation

THE PAST IS PRESENT

Agenda

- Trends & Observations
- Annual Fund Cultivation
- Major Gift Cultivation
- Questions



Fundraising Trends

- Master Plan
- Major Gift Initiative vs. Capital Campaign
- Staff driven with Board engagement
- Relationship vs donor
- Strong awareness is critical



Cultivation

- “Everyone bring in five names of people who can make a gift”
- Names of who would love our mission/outcome/cause/community
- Matchmaker – let’s fall in love
- Let the donor determine how they will fund



Advancement Model

Marketing & Communication	Annual Fund	Major Gifts	Planned Gifts
Awareness	Operating	Purpose	Endowment
Social Media Word of Mouth	Events Direct Mail Phone-a-thon Grants	Personal Asks Campaign Multi-Year Asks	Passive Information Personal Asks

Networking

- What is your philanthropic brand?
- How well networked is your organization?
- Be visible at other events – appropriately!
- Utilize Board Networks
- Wear the Brand



Key Cultivation Activities

- Ask for advice
- In-home reception – no ask!
- Behind the scenes tour
- Article emails
- Authority in community



Timeline

JAN FEB MAR APR MAY JUN JUL AUG SEP OCT NOV DEC

Board
Campaign

Newsletter

Friendraising
Event

Mission Appeal

Personal Touch

Fundraising
Event

Newsletter

Purpose Appeal

Annual Fund

- Mailings
 - Raises funding and tells your story
 - Personalize when possible
 - Impact Stories – not just need
 - Reply Card (more than just money)



Annual Fund

- Events
 - Opportunities for podium message or mission connection
 - High dollar inclusive vs. low dollar transaction
 - Fundraising vs Friend Raising (stewarding)
 - Follow-up when passion is high
 - Chemistry and atmosphere are critical



Relationship Building

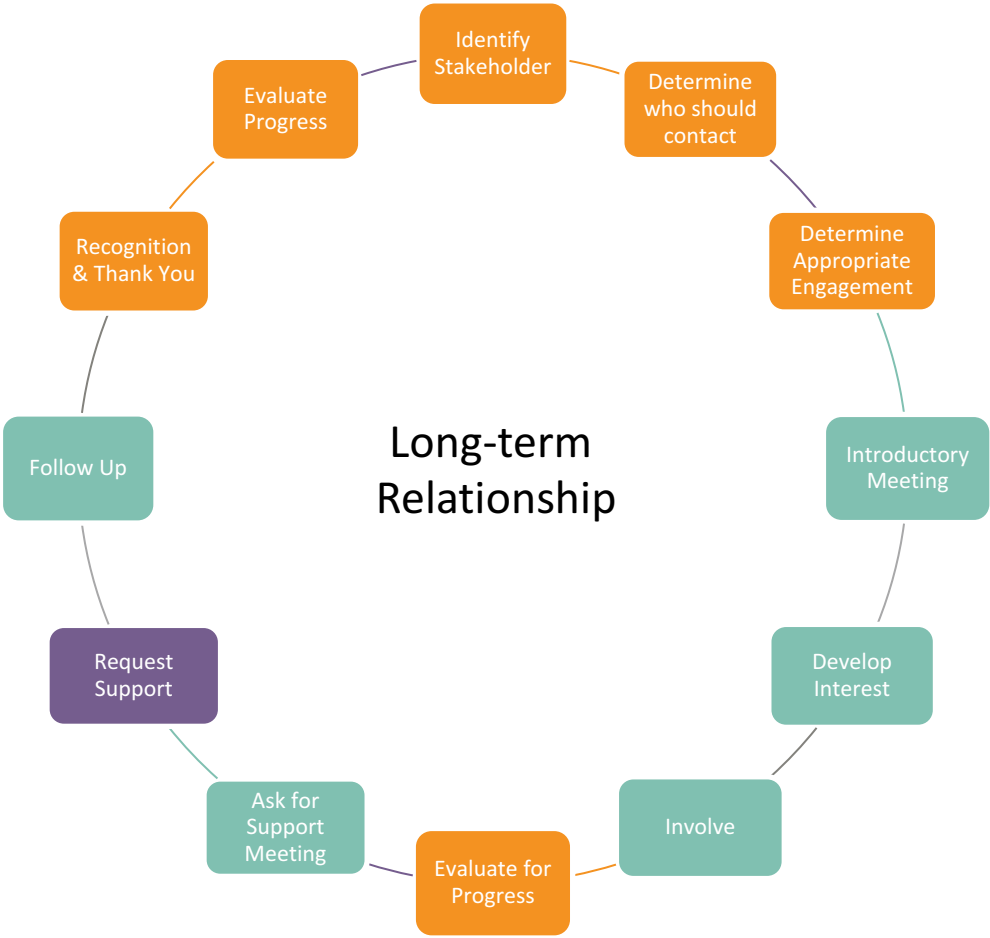
- Start with people you know
- Identify those who care about your community or cause
- Keep careful records
- Engage on more levels than just your organization
- Don't over ask
- Make it a two way street



Moves Management

PROSPECT NAME	POTENTIAL GIFT REQUEST AMOUNT	TEAM MEMBER ASSIGNED TO	NOTES	ACTION STEP
Jane Smith	\$5,000	Mike	Former Board member	Invite to lunch to get input on long range vision
Mike Smith	\$25,000	Mike/Sam	Mother was one of the founders	Invite in for a tour to update
Tim Smith	\$10,000	Mike/Rachel	Has a child that volunteers with us	Take picture and send with note
Laurie Smith	\$10,000	Rachel	Indicated she is working on a planned gift	Invite to lunch to check in

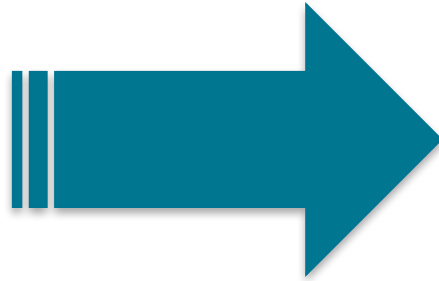
Major Gift Prospect Engagement



Transformational

Purchase

- No Questions
- Who asks
- Cash/money
- Transaction
- Tangible thing



Investment

- Passion
- Mission driven
- Variety of impact
- Involvement
- Intangible ROI



Board Evaluation

1

2

3

4

PERSONAL GIVING	Personal Gift Typical of your annual gift support	Thoughtful Higher level than annual gift support	Challenging Your gift will have a multi-year impact	Extremely Challenging This is your top philanthropic priority
NETWORK	Quiet Support You agree with the vision and goals	Open Verbal Support You are verbal in your support in meetings	Public and Private Support You support to outside audiences	Aggressive Support You are an outspoken advocate
TIME	Extremely Limited Time Commitment	Limited Time Commitment	Active Volunteer Support	Extremely Active Volunteer Support
FUNDRAISING	Limited Participation	Cultivation	Cultivation and Limited Solicitation	Cultivation and Aggressive Solicitation



Stages of a Non Profit

	Start Up	Infancy	Childhood	Adolescence	Middle Age	Maturity
Mission	Fulfilling an Unmet Need	Survival	Definition	Growth	Refinement	Fulfillment
Funding	Self-funded	Funding Opportunities	Mission-based Fundraising	Development	Cross-function development	Advancement
Donors	Inspired by Leader	Primarily Grants	Event and AF Impacted	Major Gift & AF	Planned, Major & AF	All Levels of Engagement
Staff Size	Volunteers	1-3	5-10	10-20	30+	30+
Role of Board	Seat Fillers	Skill-based	Governance	Funding, Influence & Vision	Funding Influence & Vision	Influence & Vision
Governance Structure	Founder-led	Hands-on assistance	Structure & Committees	Consent Agenda	High Elevation Issuesb	Initiative and Vision Directives

Q & A



THANK YOU!



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