



WOMEN'S
FUNDING
NETWORK



Fundraising and Stewardship: A Conversation about Systems, Behaviors & Attitudes for Raising Transformational Gifts

Tuti Scott, Imagine Philanthropy

INVESTING IN WOMEN: WORLDWIDE RETURN



Agenda Overview

- **9:30 – 9:40 Welcome and Introductions**
- **9:40 – 10:20 High Net Worth Philanthropy Study Summary and Q&A**
- **10:20– 10:45 Stewardship and Relationship Building**
- **10:45 – 11:00 Break**
- **11:00 – 11:30 Case Studies and ‘Burning Questions’**
- **11:30 – 12:00 Exercises around Money and Energy**



Fundraising Absolutes

- **People give to people**
- **People give because they are asked**
- **80-90% of the money comes from 10-20% of donors**
- **People will give to a winning cause**
- **People give in relation to the person who invites/asks them**
- **Giving is contagious – success breeds success**
- **Previous donors make the best prospective donors**
- **High sights + managed expectations = success**
- **Personal visits result in larger gifts**



Messages to Leadership and Staff for “Buy In”

“The more involved, engaged, and passionate our donors are, the more likely they are to give.”

“We are building a community that is involved and for further investment, they will want data and information.”

“The partnership is equal parts helping the donors meet their needs and elevating our program/event/mission.”

“Ask for advice and get money, ask for money and get advice. Humility, authenticity and enthusiasm ‘sells’.”



Transformational Gifts come through Relationships Built...

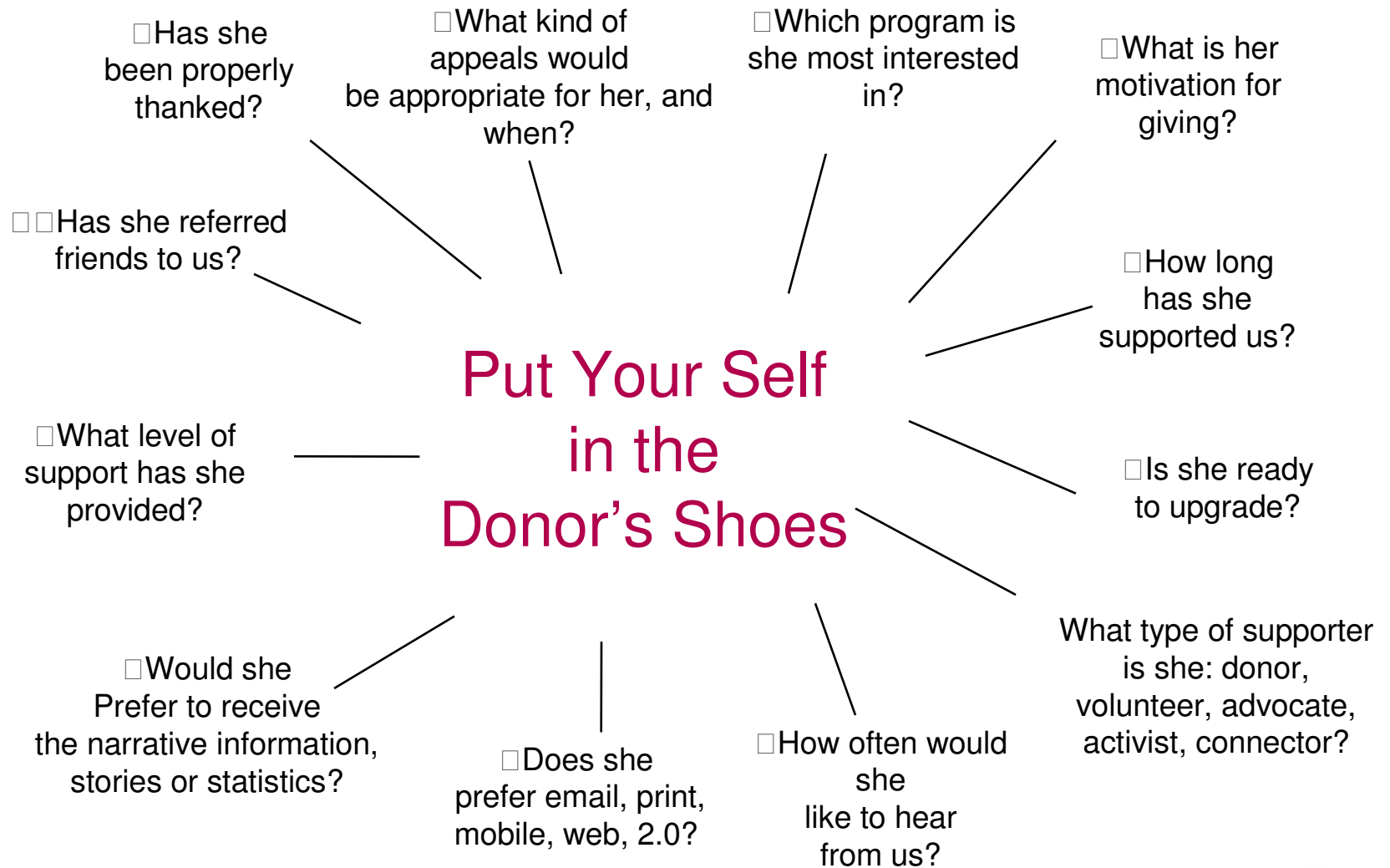
Between you and the donor

Between your organization and the donor

Between one donor and another

Between the Board leadership and the donor

**...Put resources against all of these relationships, and
your organization will grow stronger!**





Stewardship components – if you build them, the donors will come!

- **Gift processing and acknowledgement**
- **Gift acceptance policies**
- **Maintenance of donor records**
- **Gift reports**
- **Connection to organization's services and programs**
- **Recognition opportunities**
- **Knowledge of the donor's bill of rights and ethical principles**
- **Adherence of legal and regulatory compliance issues**



Stewardship 'Practices'

- Seven “Thank You’s” for every gift
- Timely, creative and personalized letters, cards, calls, notes, events, certificates, awards, program updates, articles from those who benefit and from the leadership sent throughout the year

Building and maintaining trust with donors is easiest in an organization that practices a philosophical commitment of respect and gratitude for the source and impact of all gifts.



Donor Leader Engagement and Involvement

- **Ask them to be an ‘ambassador’ for your work (host an event, table host, speak to groups, etc.)**
- **Ask them to serve on a committee**
- **Share sample proposals, web site content, reports and ask them to review**
- **Ask them to do on line postings on blogs/articles to build visibility on line**
- **Conduct focus group on strategy or program future**



Development Staff Stewardship Best Practices

- **“Staff the CEO/President/Board Chair” – who, what, when, why**
- **Follow up, follow through, follow up, follow through**
- **Moves Management meetings weekly**
- **Database discipline – no detail is too small, updated records regularly**
- **Note card writing and voicemails daily**
- **Personalization wherever possible**
- **Unique and creative thanking and engagement**

Read and share the Qualities of a Fundraiser article at:

www.ImaginePhilanthropy.com