

Crossing the Bridge to Transformational Fundraising

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WITH:

ALIGN
PHILANTHROPY



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CharityEngine and Transformational Fundraising

- Any nonprofit can transform their fundraising
- The only authentic all-in-one fundraising platform
- An industry-leading payment processor
- Software tested at enterprise levels
- A resource for nonprofits: you ask, we answer!



Guest Speaker



Maryellen Gleason

I am 6x nonprofit CEO-turned-philanthropy consultant, and my purpose is to help board and staff teams improve funding and *fundraising* to enable next-level impact for their mission.



Background

- \$25m from an individual
- \$4m from a Fortune 100 corporation
- \$1m or greater from 10+ donors
- In the 12 years I spent as an orchestra CEO, our board and staff team raised over \$100m for classical music together
- Now I work with nonprofits seeking next-stage impact, and you can find me on LinkedIn



Audience Survey

Before we get started:

“Who at our webinar today is contemplating a gift that will transform your organization?”



What Are We Talking About Today?

storytelling
ask megagifts
transformation
impact data
readiness
afterward



Mackenzie Scott

Mackenzie Scott surprised a nonprofit with a \$2.2 million donation it didn't even apply for as the billionaire continues to give away the bulk of her wealth.



We Don't Know, But We Do Know...

You are more likely to secure a transformational gift when these ten things take place:

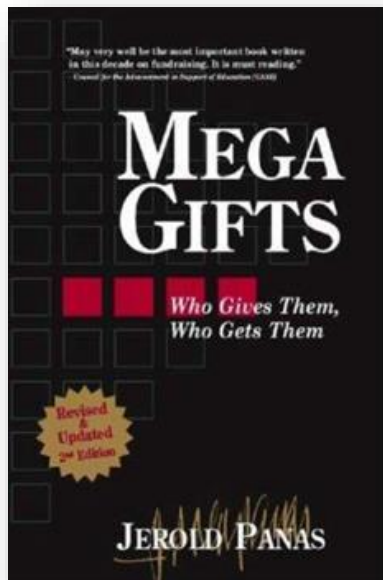
1. 100% of your board is making an annual gift
2. Purposely leading a balance of transactional (event) funding with strategic relationship-based strategies
3. Leveraging calendar and fiscal years
4. Reporting your progress on impact
5. Have a process of attracting, cultivating, and stewarding donors of all types
6. Committed to data hygiene and CRM strategy as an enabler
7. Asking often and proudly
8. Embracing capital structure to convey stability, risk mitigation, and competence
9. Manage risk by securing funding from a variety of sources
10. You get the right person(s) to make the ask, and they “invite” transformation



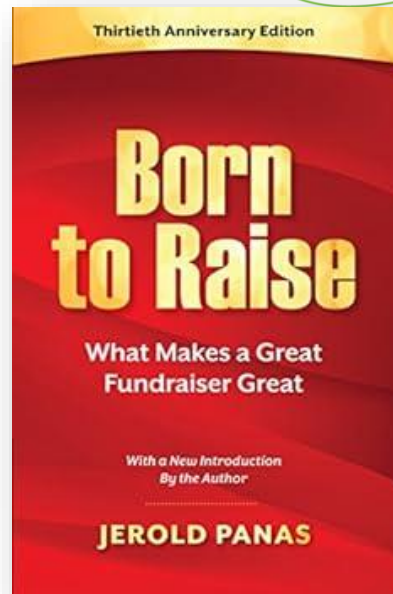
Why the Board First, and Why This is an Exponential Factor?



Going to School



Jerold Panas

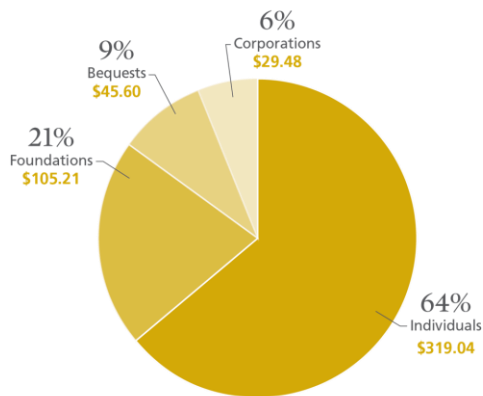


Source: <https://www.nonprofit.courses/course/bloomerang-tv-episode-41-jerold-panas/>

Example of Donor Inspiration: Individual Giving

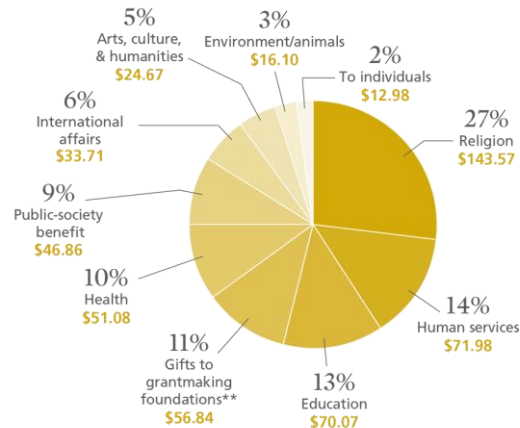
2022 contributions: \$499.33 billion
by source of contributions

(in billions for dollars – all figures are rounded)



2022 contributions: \$499.33 billion
by type of recipient organization*

(in billions for dollars – all figures are rounded)



* Total includes unallocated giving, which totaled -\$28.54 billion in 2022.

** Estimates developed by the Indiana University Lilly Family School of Philanthropy using data provided by Candid.



Source: Giving USA 2023 Report

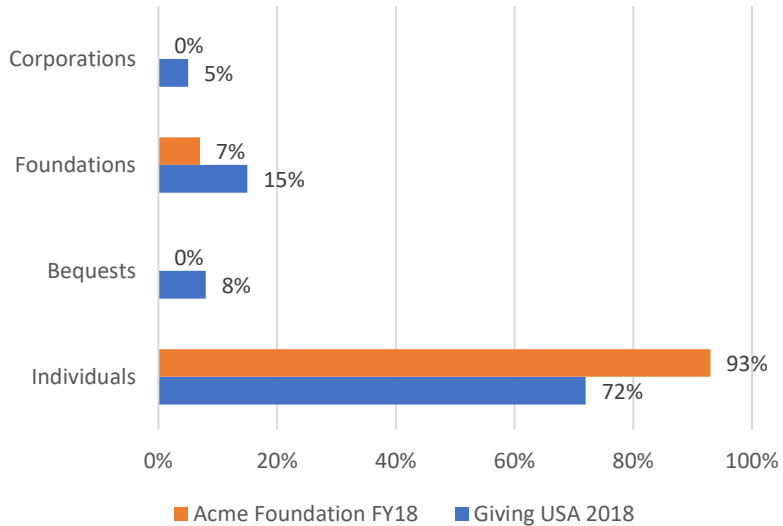
Foundations and corporations are important and complementary, but individual donors are the main source of repeatable revenue to help close the gap beyond state funding at Acme Foundation.



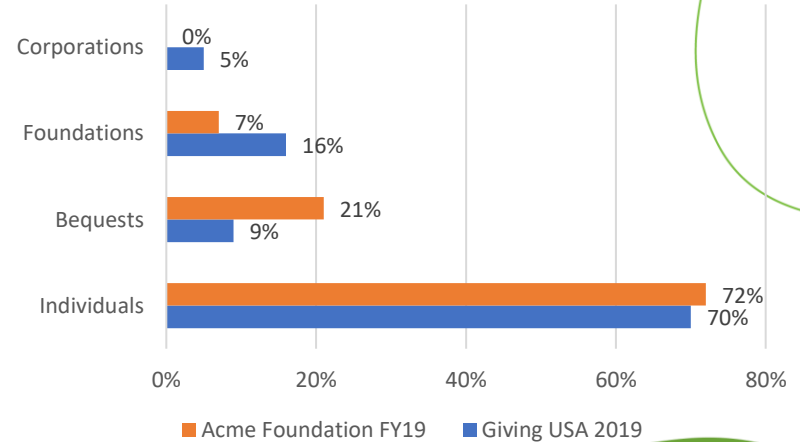
Giving USA and an Acme Example

Acme Foundation Doing Well for Individuals and Opportunity in Foundation, Corporate

FY18

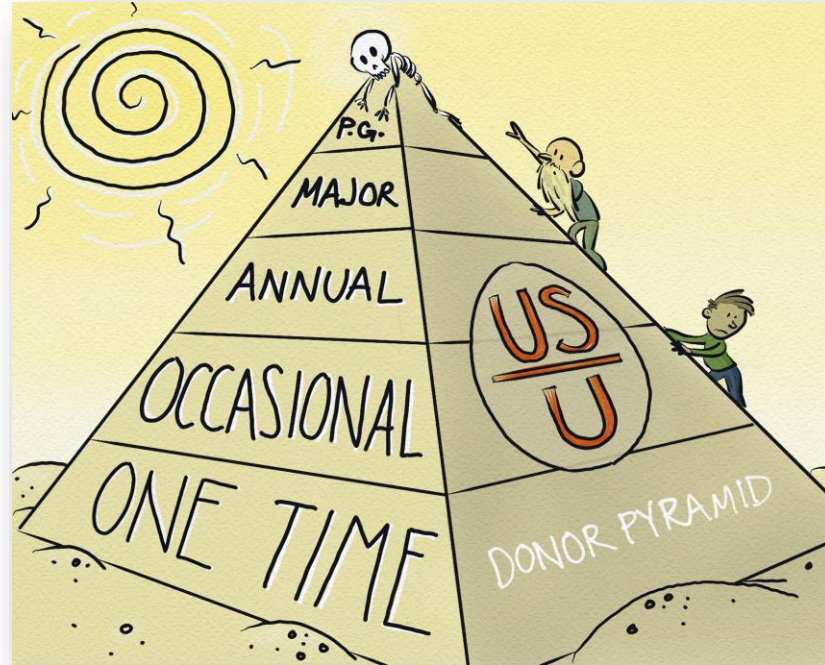


FY19 YTD

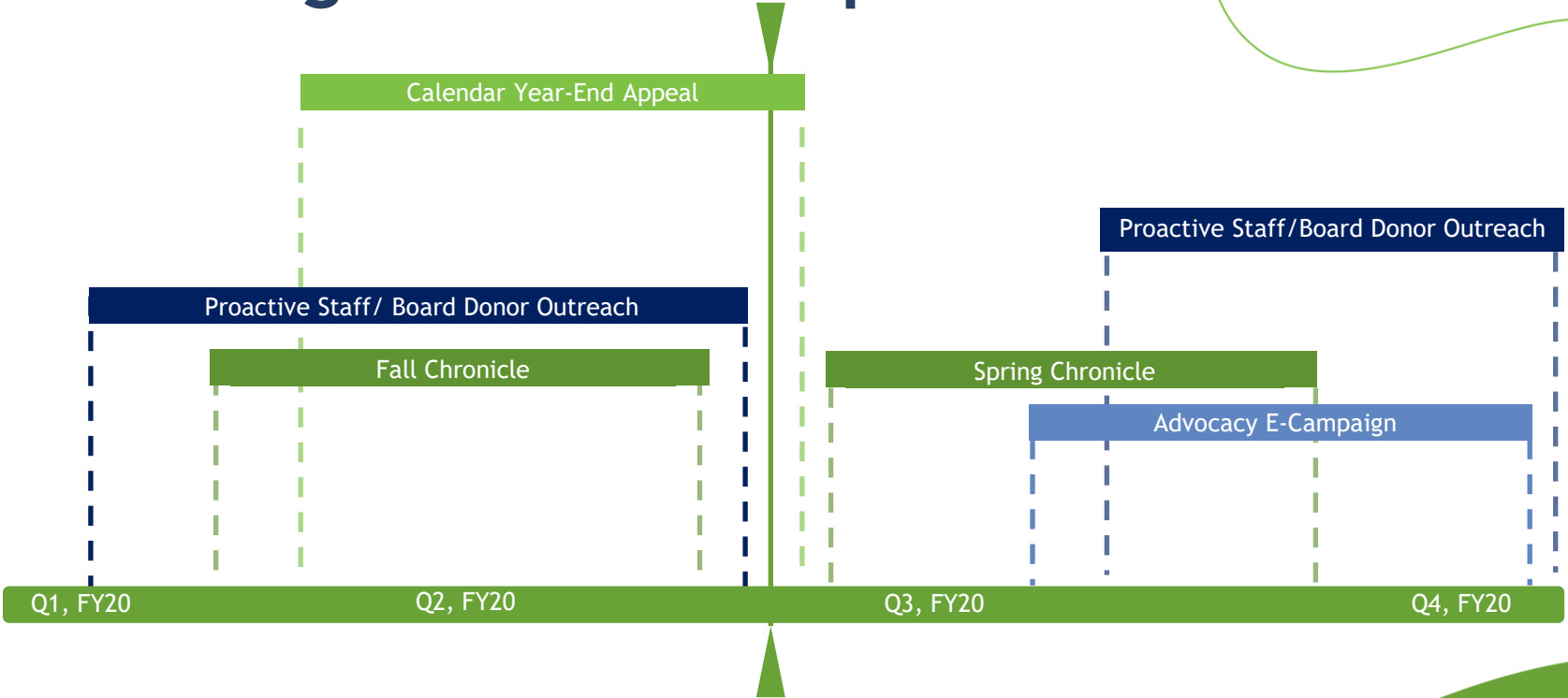


The Donor Pyramid

Donors need care and feeding to move up the pyramid from one-time donors to major/repeat donors



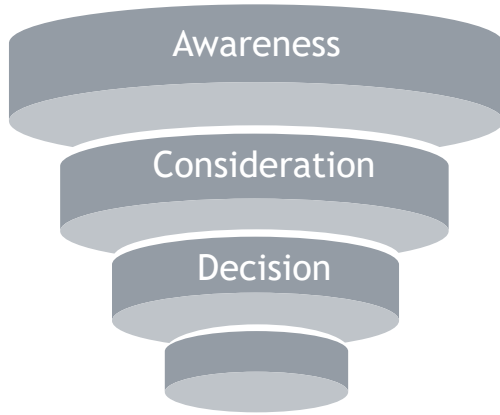
Strategic Calendar Impact



Changing World of Fundraising

Balancing Moving From Funnel To Spiral And Doing Both!

From: Multi-Channel Funnel



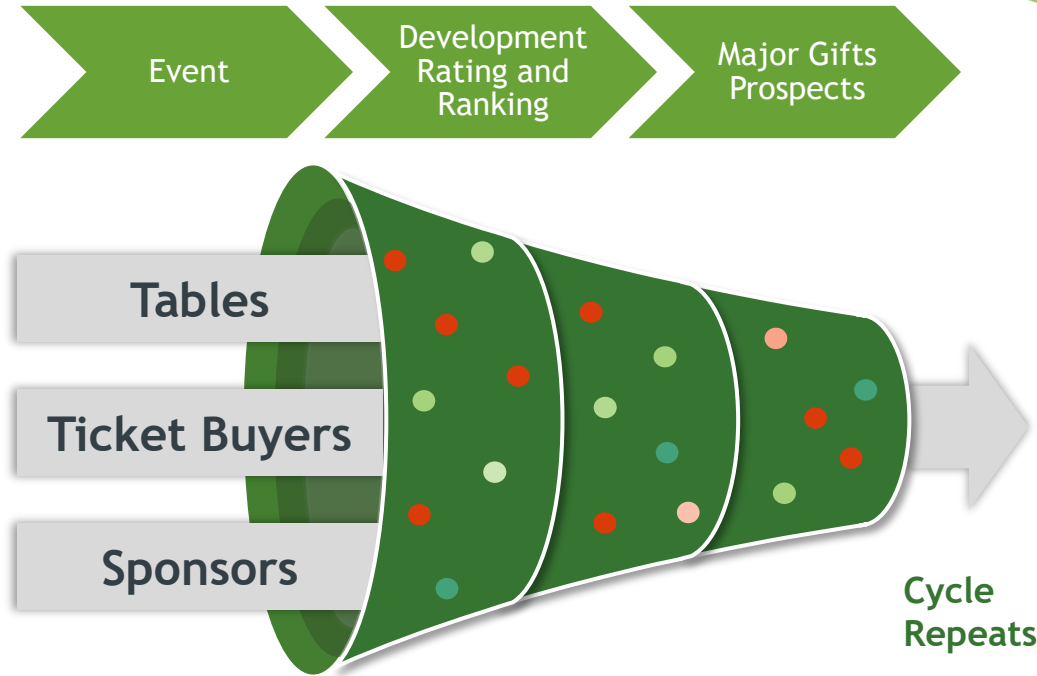
To: Omni-Channel Spiral



GOAL: Manage entry points and recognize we operate in a dynamic, competitive-selling space



Fall Event* as the Funnel to Major Gifts from Individuals



*Or third-party event hosted by another group

Development Department Converts the Funnel

BEHIND THE SCENES DEVELOPMENT DEPARTMENT

Rating and ranking of donors

Organized into rated groups/portfolio

Impact Report

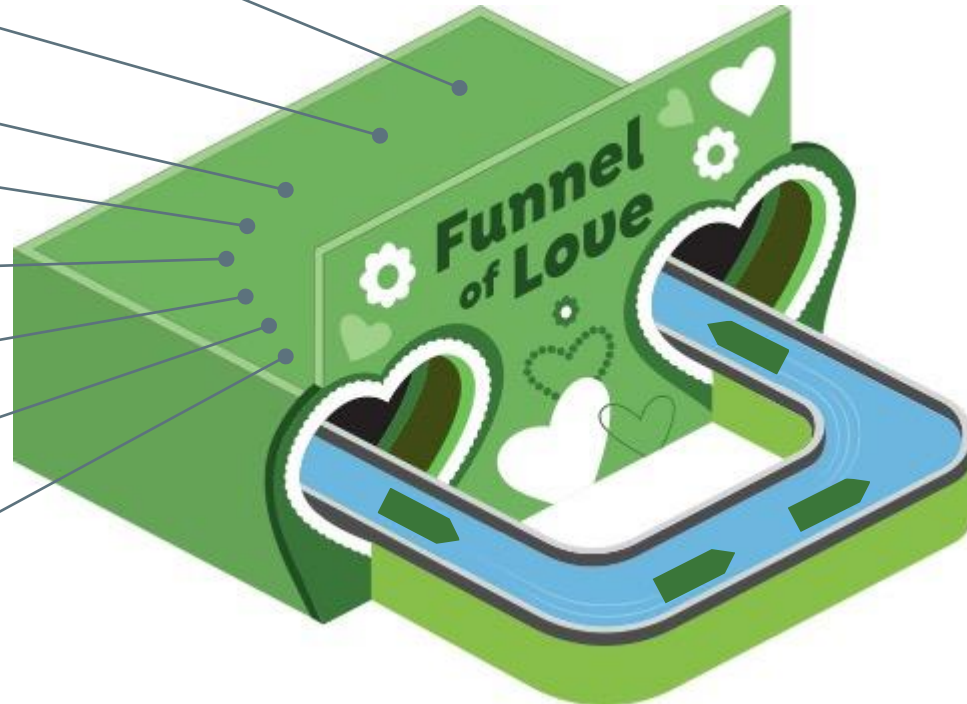
Acknowledge and Thank You

Plan for upgrades

Major gift solicitation

Repeats annually

Leads to estate giving



Event vs. Major Gifts - A Tale of Two \$50,000 Outcomes

One-to-Many Solicitation



- Staff intensive
- Thousands of hours
- Volunteers
- Costly per dollar raised
- Transactional fundraising with people giving many gifts
- Could be the first step to major gifts if managed within a system
- Difficult to scale with current staff investment

One-on-One Solicitation



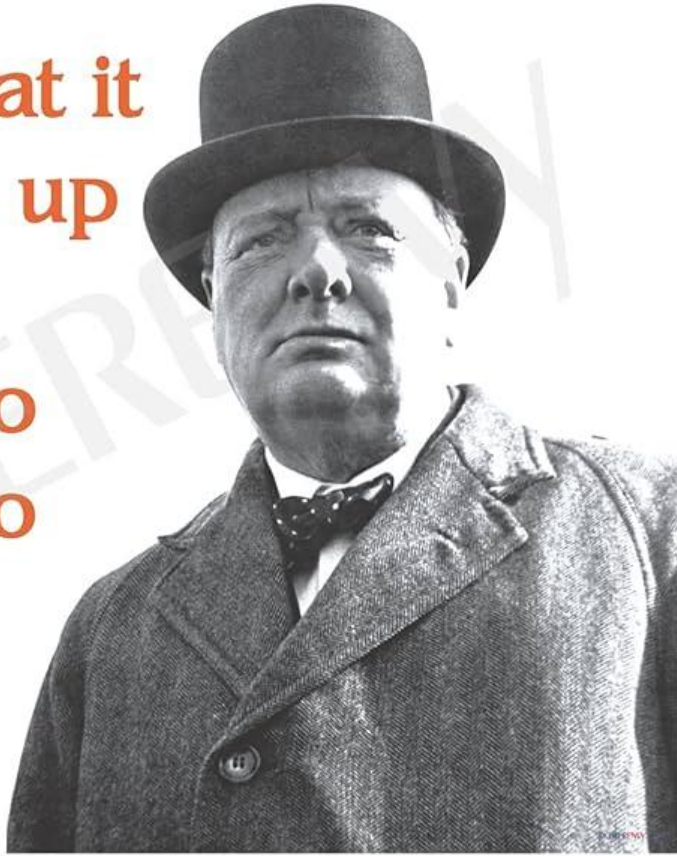
- Leadership-intensive requiring 10 to 20 hours of planning, strategizing
- Cost-efficient
- One luncheon is the “annual luncheon”
- Stewardship of past giving
- Strategic
- Requires knowledge of major gifts
- Opportunity for much larger gifts



**Courage is what it
takes to stand up
and speak.**

**Courage is also
what it takes to
sit down and
listen.**

- Winston Churchill



Tailored-Approach to Donor Strategy



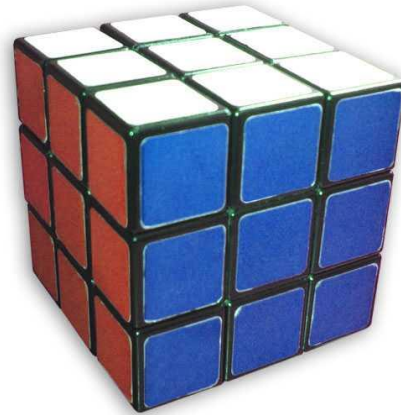
Motivation

Story

Aftermath

Alignment

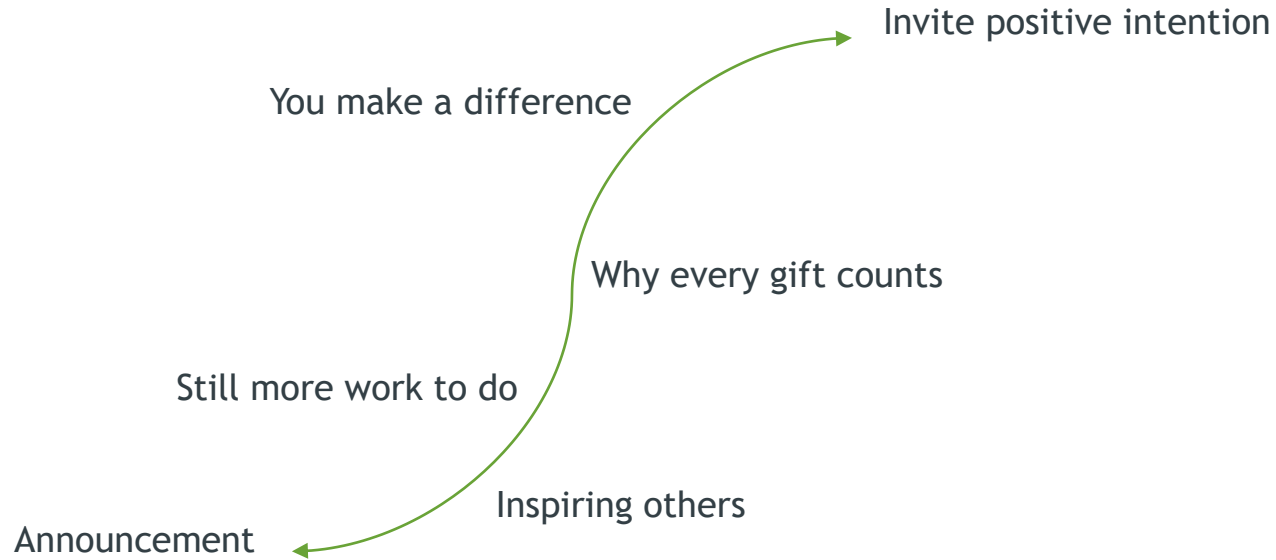
Solicitor



Action Plan: Impact Story



What Then...Start with the End in Mind





Q&A

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