

Practical Strategies for Finding New Donors

Candid Facilitators



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What is Candid?

On February 1, 2019, Foundation Center and GuideStar joined forces to become Candid, a 501c3 nonprofit organization. Together, these organizations brought a combined 88 years of expertise and millions of data points to Candid.

Why Candid?

Every year, millions of nonprofits spend trillions of dollars around the world. Candid finds out where the money comes from, where it goes, and why it matters.

How?

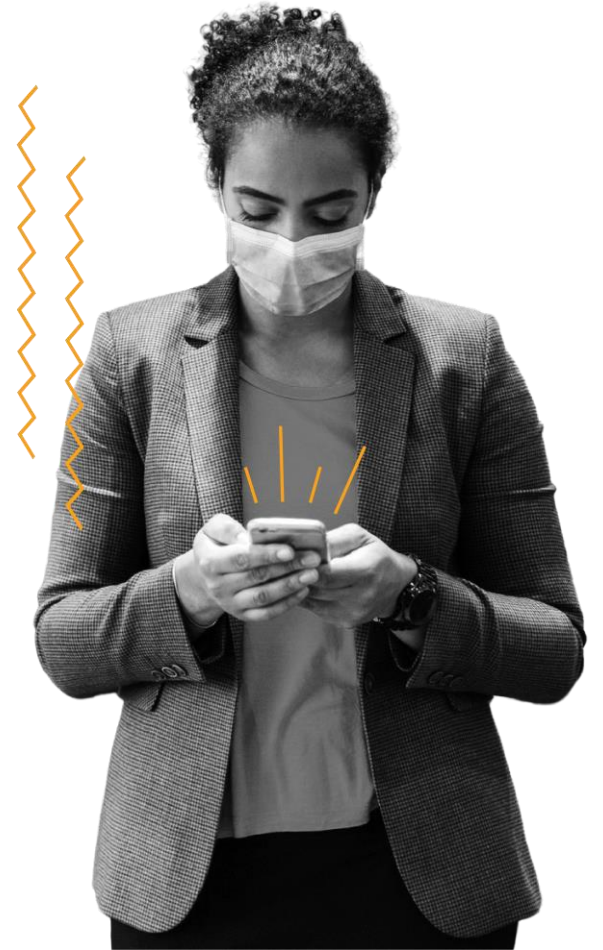
Through research, collaboration, and training, Candid connects people who want to change the world to the resources they need to do it.

Our response to global events

Thank you for being a part of Candid's learning community. We recognize that this may be a challenging time for many. Candid has shifted its key learning opportunities to a virtual format, and you can check them out at bit.ly/CandidLearningOnline. We've also invested in providing the social sector with the resources they need to make informed decisions about today's most pressing issues:

Learn more about COVID-19 resources here:
bit.ly/CandidResourcesCOVID19

Learn more about racial equity resources here:
bit.ly/CandidRacialEquity



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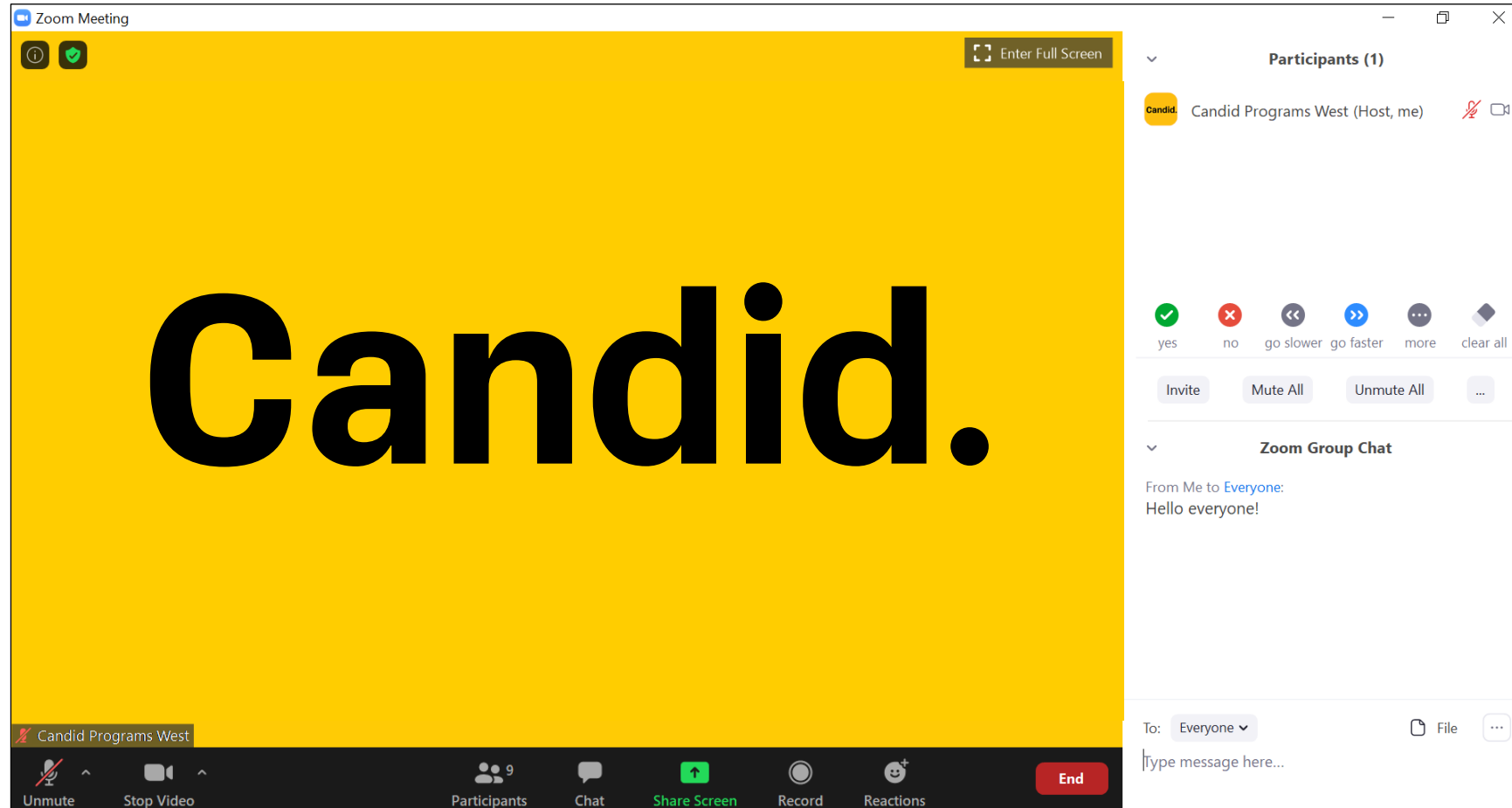


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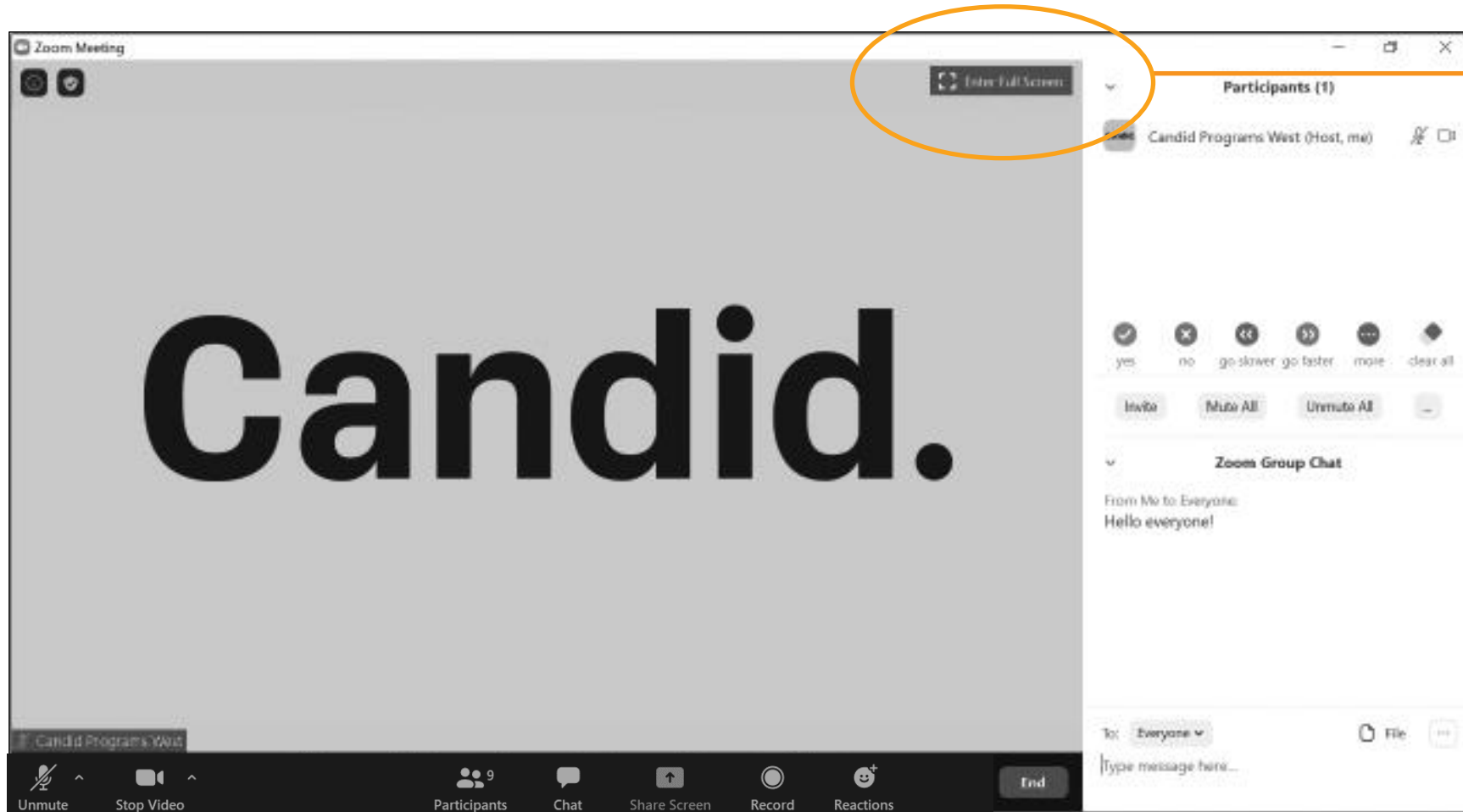
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Zoom orientation

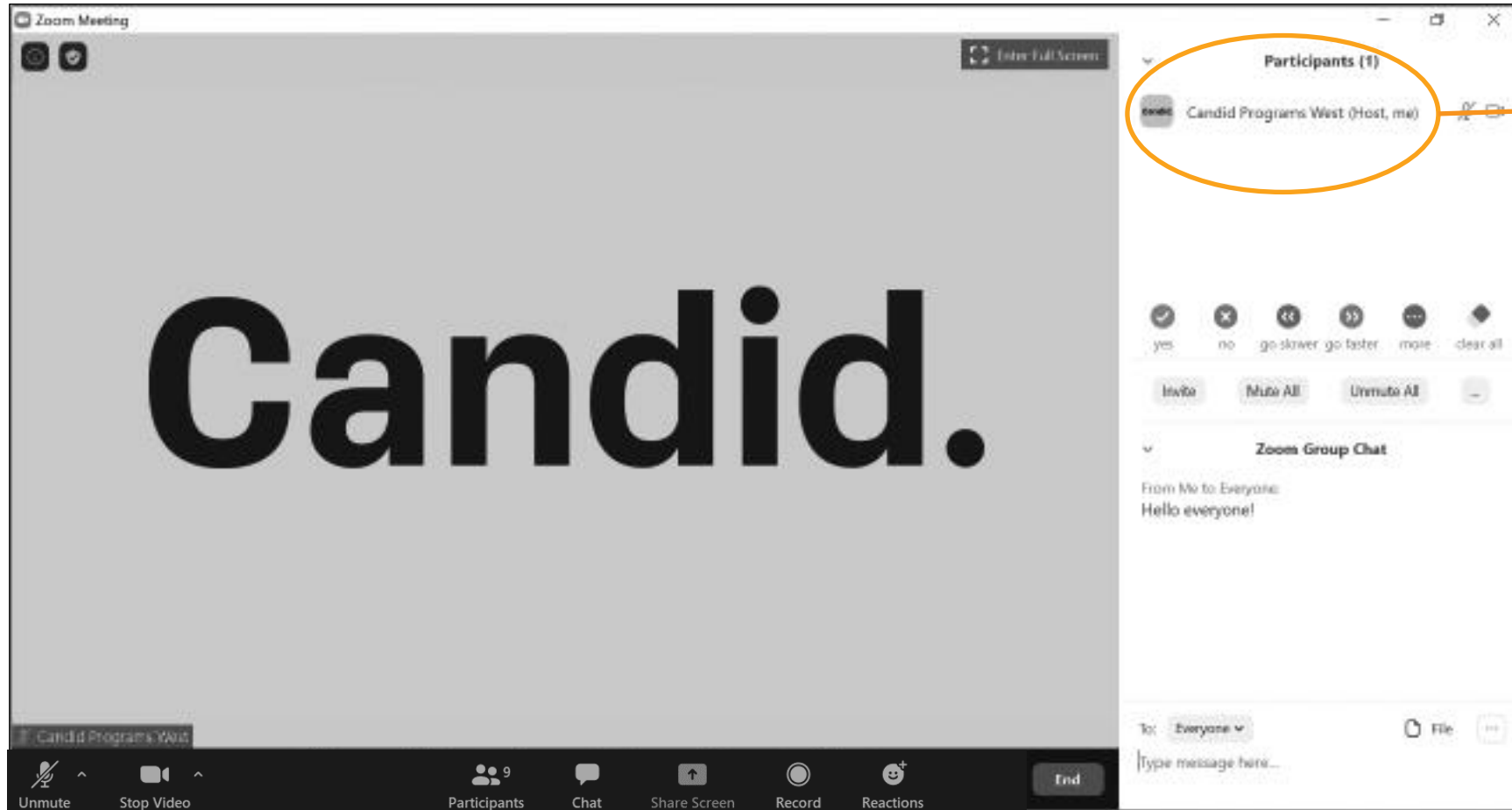


Zoom orientation



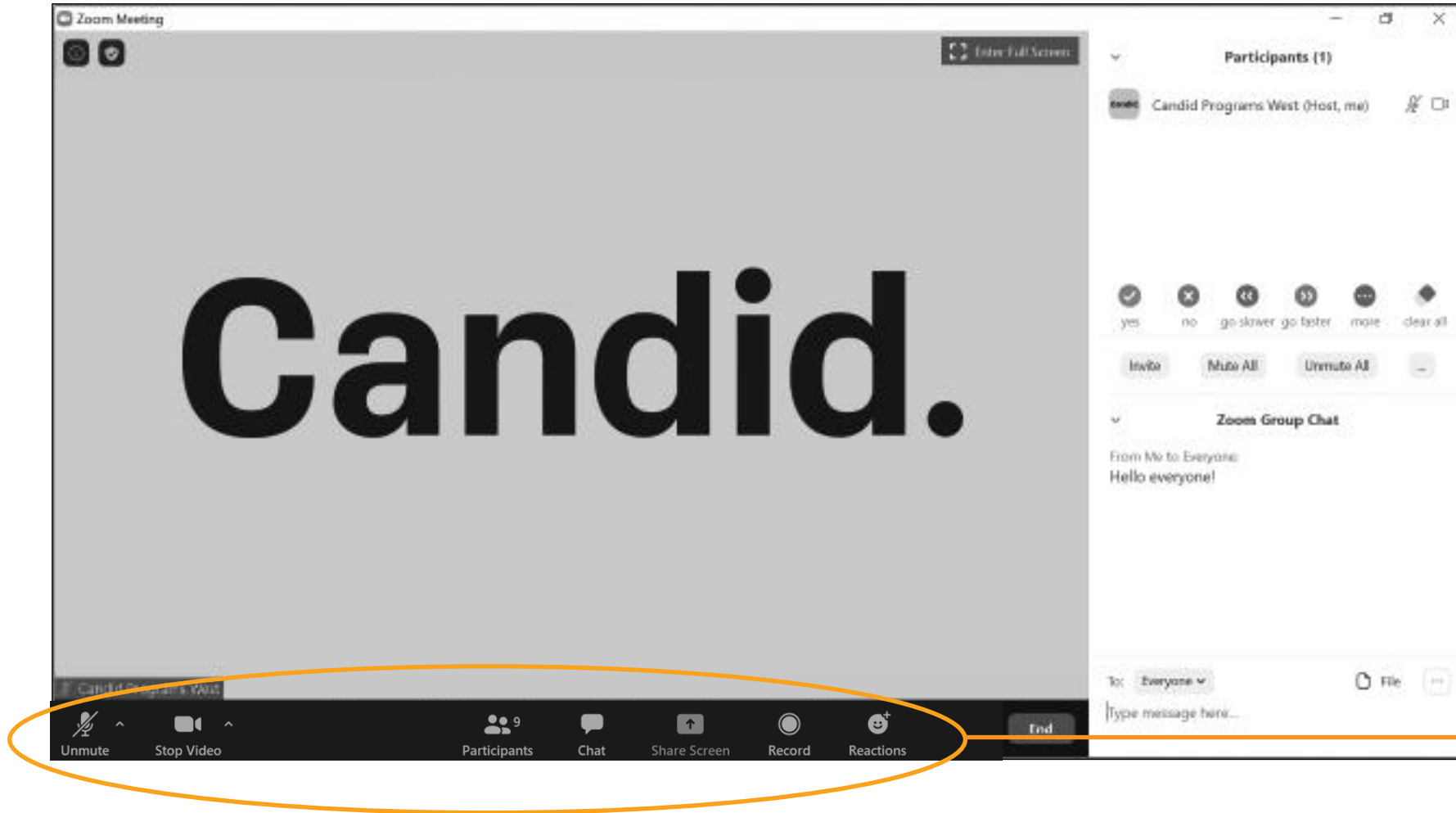
Change your screen view

Zoom orientation



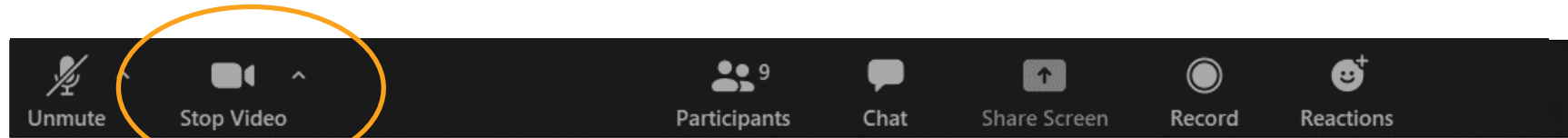
Update your name

Zoom orientation



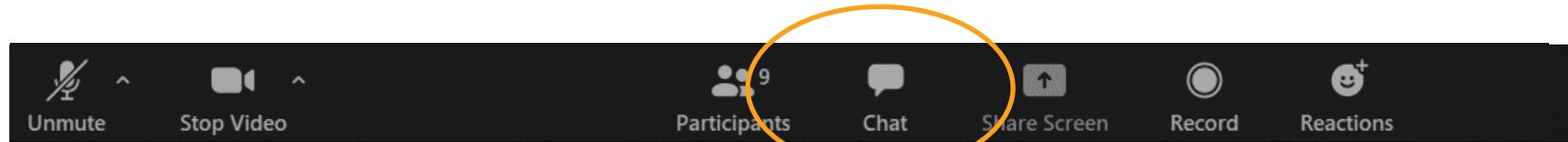
The control panel

Zoom orientation



Turn your video on

Zoom orientation



Participate in chat

Share in chat...

1. Where are joining us from today?
2. What is something you enjoy doing when you're not working?

Poll time!

Learning Outcomes

Upon completion of this course you should be able to:

- Assess how to qualify prospects using the MADDEN Test
- Examine the 10 methods of prospecting
- Summarize the role that psychology plays in how donors make decisions
- Role play effective strategies for making calls with a prospective donor



SHARE PAIR

- Your name
- Where you work
- Why you're here today



**Giving
USA™**

A public service initiative
of The Giving Institute



**THE
Giving
Institute®**

Shared intelligence.
For the greater good.

Giving USA 2023

The Annual Report on Philanthropy for the Year 2022

Comprehensive Presentation PowerPoint

Researched and written by  IUPUI LILLY FAMILY SCHOOL OF PHILANTHROPY

Giving USA 2023

The Annual Report
on Philanthropy
for the Year 2022



**Giving
USA™**

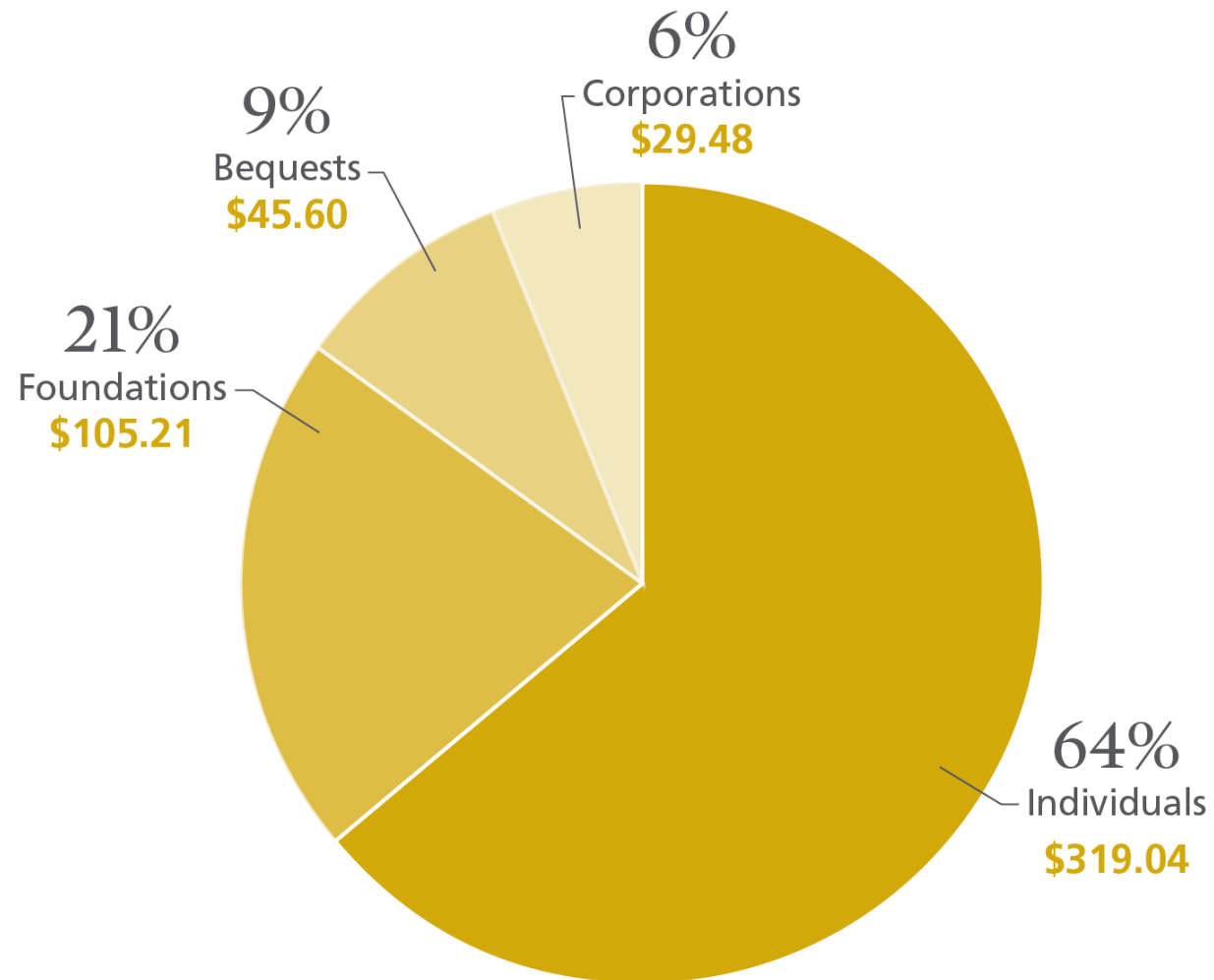
A public service initiative
of The Giving Institute

Researched and written by

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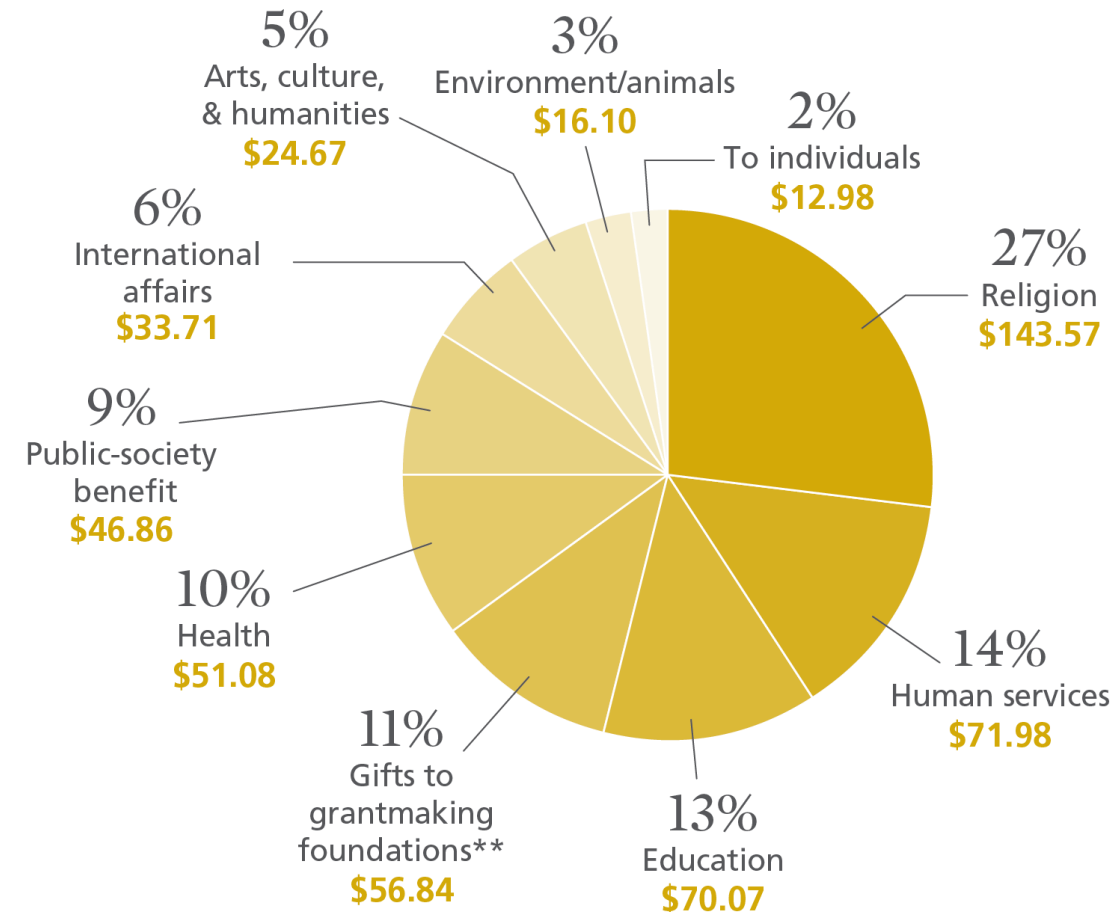
2022 contributions: \$499.33 billion by source of contributions

(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.



CHAT DISCUSSION

What do these trends say about the **larger giving landscape?**

How are understanding these trends **relevant to you and finding new donors for your organization?**

Cause Selling is a relationship-based program for nonprofit fundraising in **eight steps**.

It uses **entrepreneurial** business development tactics to help fundraisers build better **relationships** and **stronger prospect pipelines**.

The Cause Selling Cycle



Phase One

Phase Two

Phase Three

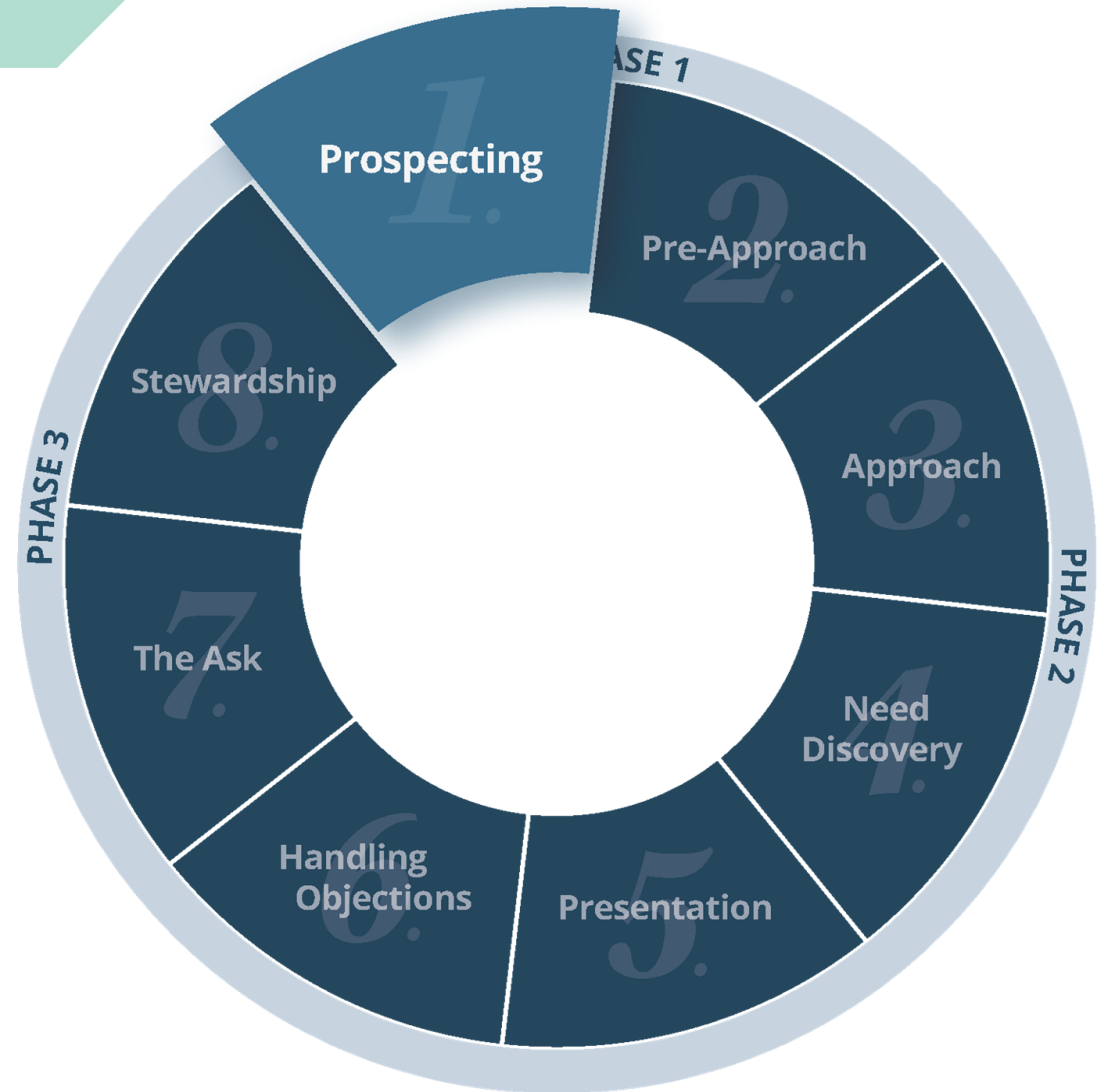


Step 1: PROSPECTING

How to find qualified donors

What is Prospecting?

The process of **looking** for, or **searching** for, prospective donors



A Qualified Prospect

A **QUALIFIED PROSPECT** is someone who has:

- The *means* to give
- The *ability* to make the giving *decision*;
- *Interest* in your organization's mission; and
- An *existing relationship* with your organization's staff, volunteers, or leadership that provides access to make a request for support.

The MADDEN Test

- M** MONEY
- A** APPROACHABLE
- D** DESIRE
- D** DECISION MAKER
- E** EMOTION
- N** NEED



INDIVIDUAL ACTIVITY:

*MADDEN Prospect Qualification
Worksheet*

Finding Prospects in your Database

A, B & C Prospects

A Prospects

- Renewing donors who have given for **3+ years** in a row with **no increase**
- **Reactivated** donors
- New **\$500+** donors whom you don't know

Finding Prospects in your Database

A, B & C Prospects






B and C Prospects

- Zip code sort
- **Frequent** ticket buyers
- High **bidders** (not necessarily winners)
- Anyone who opted to make a donation from **your website**

10

Methods of Prospecting

*Master these
techniques!*

-  **1** Referrals
-  **2** Circles of Influence
-  **3** Event Prospecting
-  **4** Direct Email and Mail
-  **5** Social Media

10

Methods of Prospecting

*Master these
techniques!*

-  **6** Warm Calling
-  **7** Networking
-  **8** Organization-initiated Prospecting
-  **9** Your Website
-  **10** Crowd Funding

Methods of Prospecting:

1. Referrals

Have person make the **initial contact** for you.

Ask for a referral!

(And **Why** people don't give referrals)

What to ask? (How should the contact be made?)

When to ask? (Make asking a regular part of the fundraising cycle)



Methods of Prospecting:

2. Circles of Influence



Believes in you and your cause

Is **influential** with a significant number of people

Is **willing** to give you **names** on a regular basis

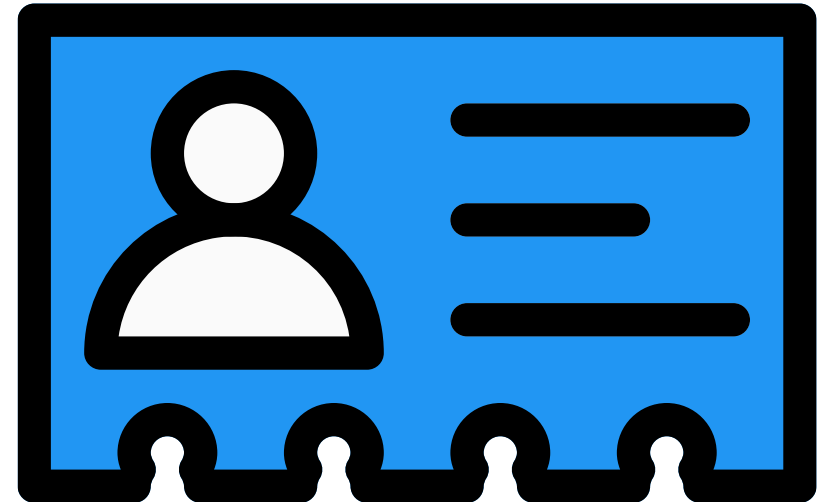
The names given to you are at least partially **qualified prospects**

Methods of Prospecting:

3. Event Prospecting

The **real power** of the event often lies in **follow-up** with attendees

Don't forget to **capture contact information** of the attendees



Methods of Prospecting:

Direct Email & Mail and Social Media



4. Direct Email and Direct Mail

- ✓ Prospects will read **well-targeted** direct mail
- ✓ Quality of the content and quality of the list itself are most important

5. Social Media

- ✓ Don't focus solely on likes or followers
- ✓ Offer followers **real content** and regular **calls to action**

Methods of Prospecting:

6. Warm Calling



Find a way to **make a connection** **BEFORE** the call

Use as a **supplement**; never your primary source of prospecting

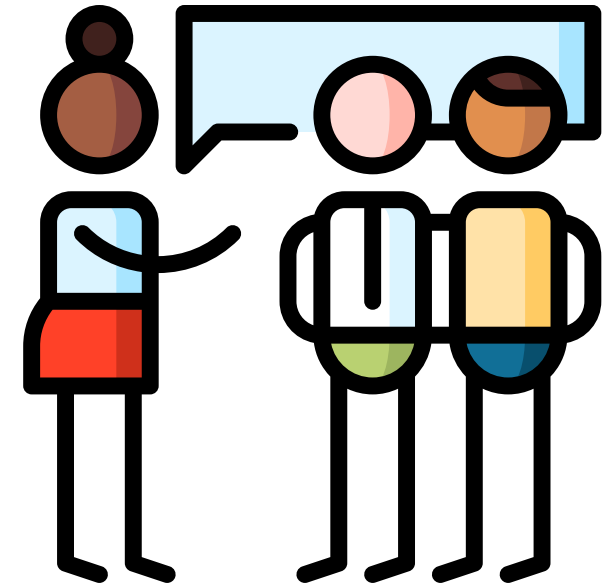
Plan for the call

Remain **enthusiastic**

Methods of Prospecting:

7. Networking

- ✓ The 3 C's of Networking:
 - Connecting
 - Communicating
 - Cooperating
- ✓ Sharing information makes **good sense**
- ✓ Join groups and don't forget to **share your business card/contact info**



Methods of Prospecting:

Organization-initiated & Website



8. Organization Initiated

- ✓ Telemarketing (large organizations/media assistance)
- ✓ Event attendees/single tickets
- ✓ LYBUNTS and SYBUNTS

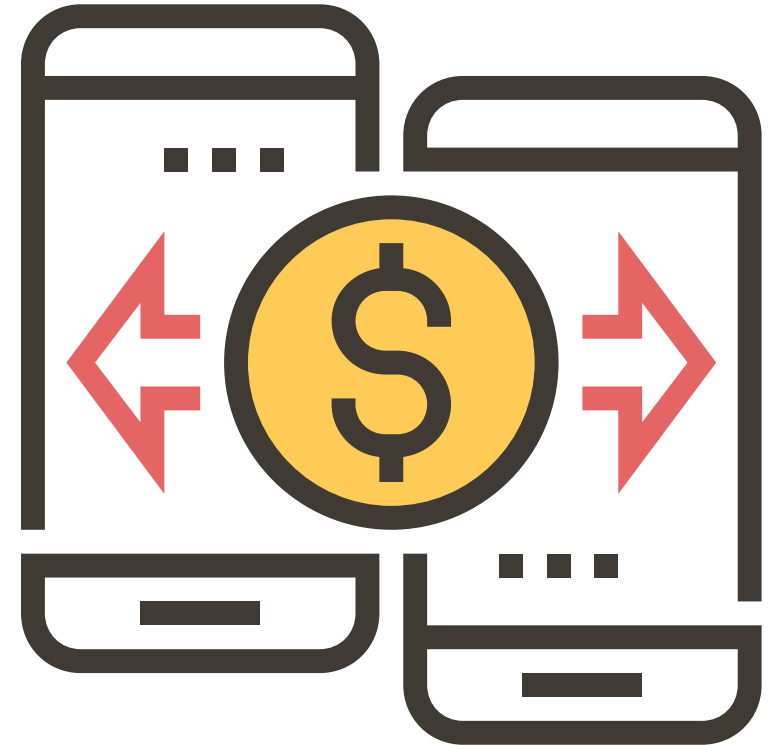
9. Website

- ✓ Drive prospects to site to donate
- ✓ To a call to action
- ✓ Use affiliate program marketing
- ✓ Consider short vignettes or links to videos

Methods of Prospecting:

10. Crowdfunding

- ✓ A great way to initiate an **online fundraising campaign**
- ✓ Works best for funding **specific projects or campaigns**
- ✓ Crowd-funding websites **cannot replace** traditional fundraising efforts



GROUP ACTIVITY:

Break into groups of **4 or 5**.

Devise a **strategy** for your assigned method.

Share your **strategies and tactics** with the rest of the group

Poll

Tour of Bridge

Questions?

See you next
week!

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SHARE PAIR

1. How did it feel talking to a colleague about adding more prospects to your MADDEN qualification test?
2. How will you incorporate some of the prospecting strategies we brainstormed together?

Why Do People Give?



QUESTION:

What is the number one reason a donor decides to give to a nonprofit?



ANSWER:
THEY WERE ASKED.
(BY A FUNDRAISER)

The Power of our Brains

PSYCHOLOGICAL INFLUENCES

Perception
Mood
Attitudes
Self-Image

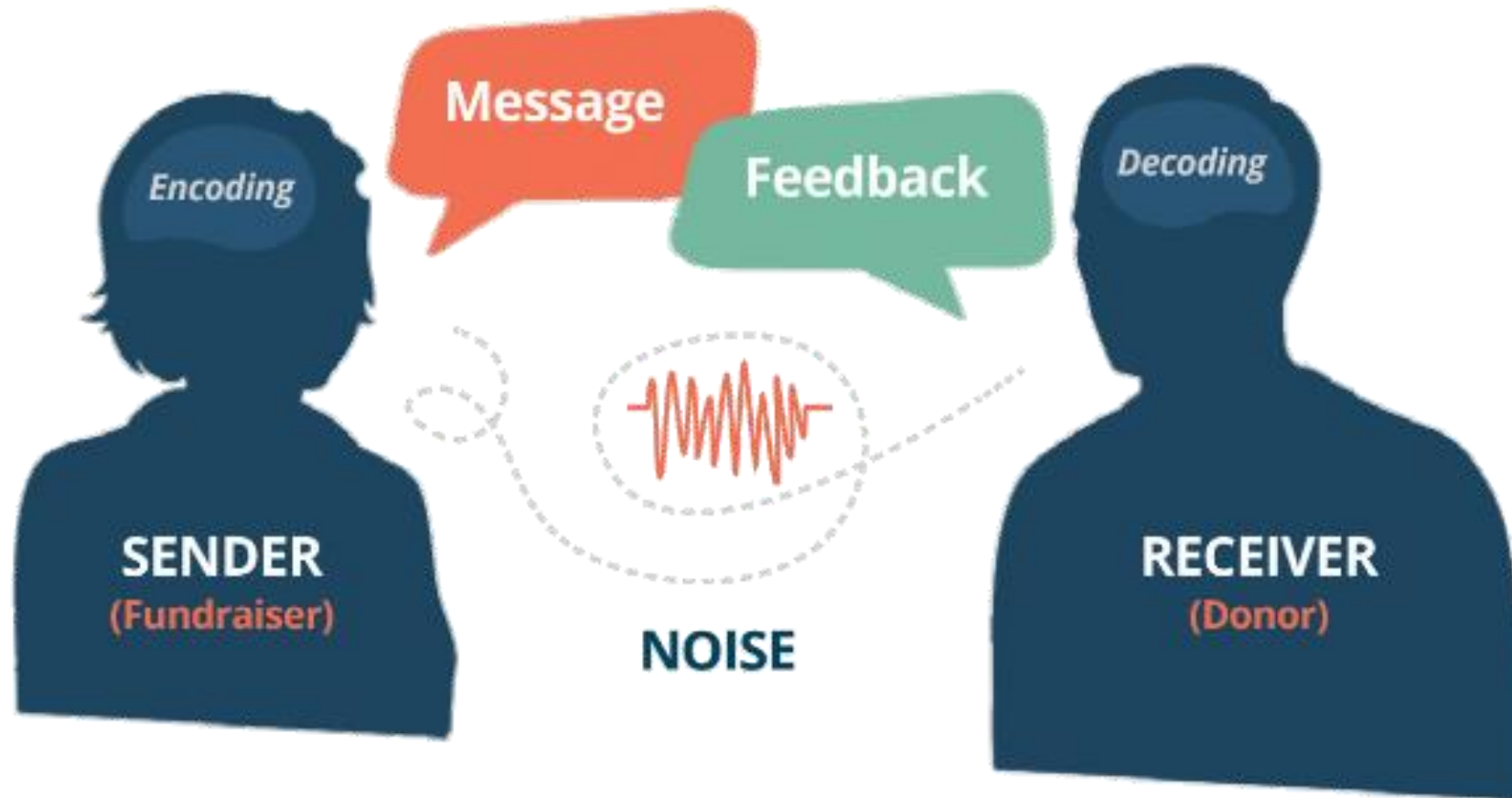


SOCIOCULTURAL INFLUENCES

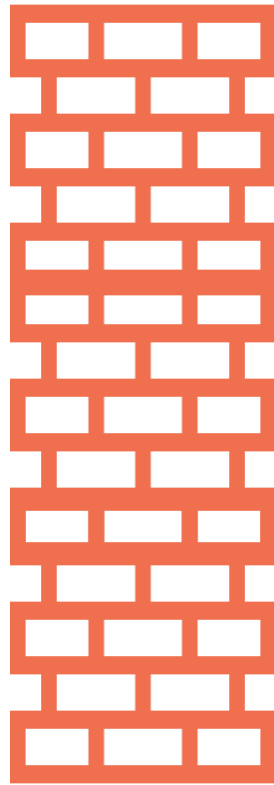
Culture
Customs
Physical
Environment
Social Class



The Communication Model



Barriers to Communication



Choice of words

Visual distractions

Overcomplication

Bad listening habits (*yours or theirs*)

Timing (*if your prospect is having a bad day, that's out of your control. Reschedule and don't stress*)

TOMA:

Top-of-mind Awareness



Write down one way to get and keep TOMA with a prospect:

1. Social Media
2. Email
3. Snail Mail
4. Virtual Events
5. Phone
6. Other...

The Cause Selling Cycle



Phase One

Phase Two

Phase Three

Step 2: PRE-APPROACH

What to do before you meet

What is Pre-Approach?

The planning and preparation done **prior to contact** with prospect



Sources of Pre-Approach Information

- Colleagues
- Current donors
- Board members
- Internet/social media research

Utilize **Social Media** During Pre-Approach

***Disclaimer:** Increasing your social media presence by no means guarantees more donations*

- **BUT** you can maximize the **reach** and **effectiveness** of social media to **boost** your pre-approach efforts
- You can also perform a quick search of **prospects** via Google & Social media **to begin qualifying them**

Pre-Approach Checklist

- Who drives philanthropic decisions?
- Giving history with your organization
- Personal interests
- Passions and priorities
- Other charitable work and giving
- Connections

INDIVIDUAL ACTIVITY:

Review the Pre-approach Information Checklist

Getting the Meeting



The Pre-Ask Meeting

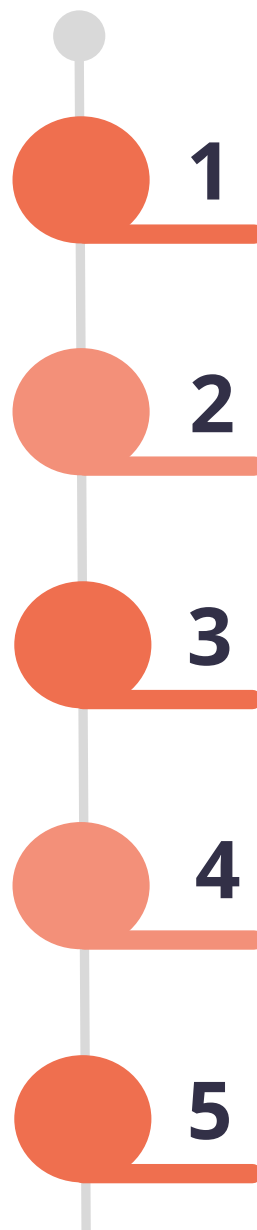
- An initial meeting with a new lead whom you believe to be a qualified prospect
- May be necessary to obtain the information in the MADDEN Test
- Not a gift ask meeting
- Opportunity for genuine rapport building & info gathering

The Purpose of the Pre-Ask Meeting

- Move closer to the gift
- Build a relationship between prospect & organization
- Learn about prospect, their resources, their philanthropic inclination
- Update prospect on programs & gaps in service & need
- Thank prospects for their giving & involvement

10

Questions Your Donors are Wondering



1

What does your organization do?

2

How much money am I prepared to give based on what I've heard?

3

What will you do with my gift?

4

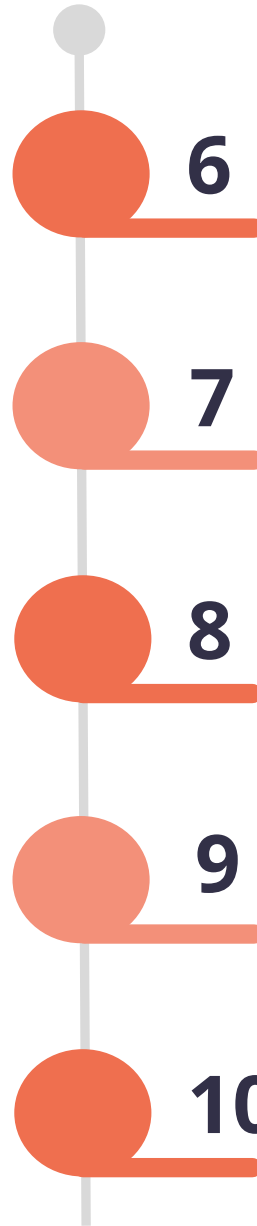
Is the work you do/your mission truly unique?

5

What kinds of problems do you solve?

10

Questions Your Donors are Wondering



6

How much time is this going to take?

7

Will I get anything in return?

8

Who else do I know who has contributed to your organization?

9

How long have you been with this nonprofit?

10

Why should I trust you?

The Anatomy of a Phone Call



The goal is to secure a **face-to-face/virtual meeting** with your prospect since major gifts rarely come from phone calls.

Overcoming Resistance to Meeting

Donor: "I'm too busy, and I simply don't have time to meet. Can you send me something in the mail?"

Optional Responses:

"I'd love to. Of what I just said, what caught your interest?"

"It sounds like you've got a lot on your plate. Just out of curiosity, what will be a good time to follow up with you?"

INDIVIDUAL ACTIVITY:

Scripting the Call

PARTNER ACTIVITY:

Role Play the Call

GROUP DISCUSSION

What uncertainties still remain?

What's your greatest fear?

*What do you anticipate as your
biggest challenges?*

What would you like more practice with?

Questions?

How did we do?

Your feedback is important to us!
Please take a moment to fill out
our course survey:

bit.ly/CandidNewDonors



What's next

Live online workshop | October 13

Your Board And Fundraising

bit.ly/101320YourBoard

Live online training | Starts October 20

Proposal Writing Boot Camp

bit.ly/10202020PWBC

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