

WHAT DONORS WANT



*Establishing Trust in your
Organization
and
Talking Impact, Not Overhead*

February 3, 2017



Agenda



- **Setting the Context—Association Foundation Fundraising Overview**
- **Engaging Your Members as Donors**
 - Creating A Culture of Giving
 - Telling Your Story and Defining Your Impact
- **Case Examples**
 - DC Bar Foundation
 - Tulsa County Bar Foundation
 - Philadelphia Bar Foundation
- **Q&A**

Setting the Context



ASSOCIATION FOUNDATION FUNDRAISING



Associations--Are Members Charitable?

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The GOOD:
Association members *are* charitable

The BAD:
but not to their associations...yet

What does this mean for you?

- With a solid fundraising strategy, there is huge opportunity for your association foundations to tap into the philanthropy of your membership!

Source: ASAE & The Center for Association Leadership

Yet...why is fundraising so hard for associations?



“We’re struggling to raise money because we think many of our members may not fully understand what we do and why we need to raise money from them.”

“We’ve seen a decline in our membership and have had to restate our membership levels.”

“We are trying to figure out how we can offer our members giving opportunities...”

Why Have a Foundation?

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Improved Perception

- Advances way the broader community views your profession.

Value to Members

- Makes members directly support issues tied to their profession or field.

Give Back to Society

- While the parent association is focused promoting and advancing its members and profession, the foundation typically supports education, research or other services that benefit the public.

Who gives to professional associations?



Association Foundation donors:

- Typically belong to more professional associations (on average 3 professional organizations)
- Have been in the profession longer (half were more than 20 years in their field)
- Volunteers were 3x more likely to give
- Are frequent donors to other causes

Why do members give?

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Members are most inclined to support their Associations philanthropically when funds are used for:

Student entry
into their
profession

Research to
advance
knowledge in
their field

Causes related
to the
association's
mission

Special projects
related to
professional
education

Source: ASAE & The Center for Association Leadership

Do dues affect donations?

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Do member benefits affect the way people give?

YES

- **Members who are satisfied with association benefits are 4 times more likely to give** philanthropically to the association or its foundation than those who are dissatisfied.

Will dues preclude other giving, and vice-versa?

NO

- **Members do not see a tradeoff between paying dues and making charitable gifts** to an Association.

Are philanthropic asks an overreach with members?

NO

- In fact, the most commonly cited reason that association members don't give charitably is that they have **never been asked to do so, or they haven't been asked the right way.**

Source: ASAE & The Center for Association Leadership

Engaging Your Members as Donors



Creating a Culture of Giving



Challenge

- Members don't see your foundation as a philanthropic priority.
- 

Goal

- To encourage your members to become donors.
- 

How do you do this?

- Inspire members with stories of your impact and the difference their gift can make.
- Offer them ways to become involved.
- Celebrate their generosity.

Inspire: Tell Your Story



Who Are You?

- What is the vision and mission of your association foundation?
- How is your foundation different from the parent association?

Why Should Your Members Care?

- What is the need your foundation programs seek to address?
- What change do you hope to see because of your foundation's programs? In your profession? In your community?
- What does it cost to support that vision (direct and indirect expenses)?

Source: Guidestar *Charting Impact* and *Leap of Reason*

How Do You Define and Articulate Your Impact?



Create a sense of urgency for your community/for your profession.

Describe what will be different because of your programs. How do you know you've been successful?

Develop a communication strategy

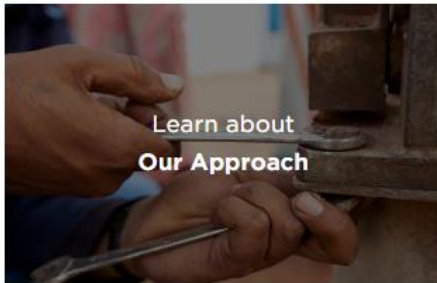
- Use specific metrics that quantify results
- Tell stories to bring the impact to life

- Position your foundation within the broader profession and community needs
- Repeatedly reinforce the case for the need for contributed income in addition to member dues
- Use communications and events of parent association and your foundation to elevate mission and vision of foundation

How We Work

We invest the money we raise into organizations with years of experience to build sustainable, community-owned water projects around the world. Our team works closely to ensure that every dollar is accounted for and then provides reports back to our donors.

Learn about our approach, the solutions we fund and our partners on the ground.



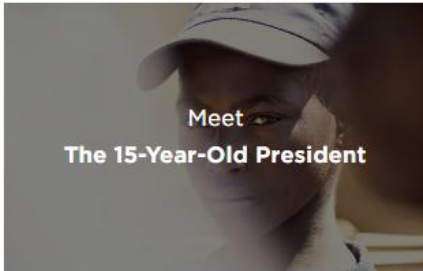
Our Progress

We're passionate about solving the water crisis in our lifetime, using 100% of all public donations to fund water projects, and proving where every dollar goes with photos and GPS coordinates. Here's the progress we've made since we started working in 2006.

21,118 Water projects funded ?	6,400,000 People will get clean water ?	25 Local partners ?	24 Countries
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Stories From The Field

Our time in the field gives us a personal view on what it's like to get clean water for the first time. The mothers, children and communities that we've met inspire our ideas and, often times, solutions. Every one of them has a story worth sharing.



[SEE ALL STORIES](#)

The Future Is Bright



We're not just about funding new wells, we're also taking care of the ones we've already built. This is how we ensure that our water projects continue to provide clean water to communities long after they are installed. Pipeline is a system of local leaders, innovative technology and trained mechanics all working together to keep water flowing at charity: water projects around the world.

Inspire: *Tell Your Story*



Personal stories
or letters from
beneficiaries

E-Newsletters

Pictures—tell
1,000 words

Stories of
success and
failures

1:1 Staff Visits
or CEO
conference calls

Virtual Site
Visits

Videos

Events at
Annual
Meetings

Act: Offer Ways for Donors To Get Involved



DONATE



VOLUNTEER



**SPREAD THE
WORD**

Celebrate: *Treat Your Donors As Heroes*



I think a **hero** is any person *really intent* on making this a better place for all people.

Maya Angelou

Celebrate Your Donors' Impact

Thank YOU!

Income
£390,410

(2013: £303,459)

Expenditure
£350,727

(2013: £300,695)

Your prayers, your time, and your generosity last year enabled 1,002 young leaders to be equipped to lead local mission - that's more in one year than at any other point in our 15 year history!

If you would like to help equip more young leaders, please contact Robin on +44 (0)1865 788355 or at robin.peake@innovista.org

Thank you.

This is a provisional summary of Innovista International's financial activities for the year ended 31 December 2014. Full audited accounts will be available from the office on request.

47%
Individuals

33%
Trusts and Foundations

- 9% Churches
- 4% Local Government
- 4% Earned
- 3% Other donations

88%
Developing 1,002 young leaders for mission
(2013: 941)

- 11% Raising prayer and financial support
- 1% Governance

Case Examples



DC BAR FOUNDATION
TULSA COUNTY BAR ASSOCIATION FOUNDATION
PHILADELPHIA BAR FOUNDATION



DC BAR FOUNDATION

WE INVEST IN JUSTICE

DCBF

Overall Grade: B+

Who are you?

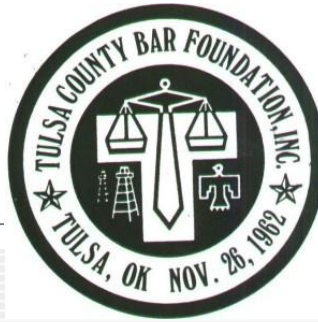
- Clear Mission Statement
- *The DC Bar Foundation is the leading private funder of civil legal aid in the District of Columbia. We are committed to the vision that residents of the District have equal access to justice, regardless of income. DCBF's mission is to fund, support, and improve legal representation of the poor, vulnerable, and otherwise disadvantaged in the District of Columbia.*

Why Should Your Members Care?

- Community need for DCBF programs articulated
- Programs presented as the solution as “360 degrees of support:” Grants, Poverty Lawyer Loan Repayment Assistance, Training and Technical Assistance

How can Your Members help?

- Volunteer opportunities offered
- Donate Button easy to access
- Annual Report highlights giving levels



Overall Grade: C

Who Are You?

- No Mission Statement
“through its educational and charitable efforts, is continuing to expand our role of keeping the legal system accessible.”

Why Should Your Members Care?

- No need statement
- Why should a member support TCBF’s legal services work in the community versus giving to another direct service provider?

How Can Your Members Help?

- Volunteer Opportunities through programs like Annual Law Week, Ask-A-Lawyer and Lawyer in the Library, TCBF Community Outreach Committee
- Donate Button does not offer donor ability to designate contribution
- No Annual Report or celebration of members’ philanthropy



Overall Grade: A

PHILADELPHIA BAR FOUNDATION

Promoting Equal Access To Justice Since 1964

Who Are You?

- Clear Mission Statement
- *The Philadelphia Bar Foundation is dedicated to promoting access to justice for all people in the community, particularly those struggling with poverty, abuse and discrimination. The Bar Foundation is the embodiment of the Philadelphia legal community's commitment to this fundamental principle. We accomplish this mission by providing grants and technical assistance in support of quality legal services, addressing unmet legal needs and providing education on matters in the public interest.*

Why Should Your Members Care?

- What Makes You Unique? section
- Impact section
- Strategic Plan prominently featured on website
- Offers benefits from donor, public, and community perspectives

How Can Your Members Help?

- Gift Options, Gift Levels, Gifts in Honor/Memory of on the online donation page
- Giving societies for different forms of philanthropic support
- Annual Events
- 13 Named Awards that donors can designate their gifts to support

Inspire, Engage, Act

People will remember how you made them feel about the difference their gift can make.



Keep focus
on your
dreams
and
impact.

Make your
work
tangible.

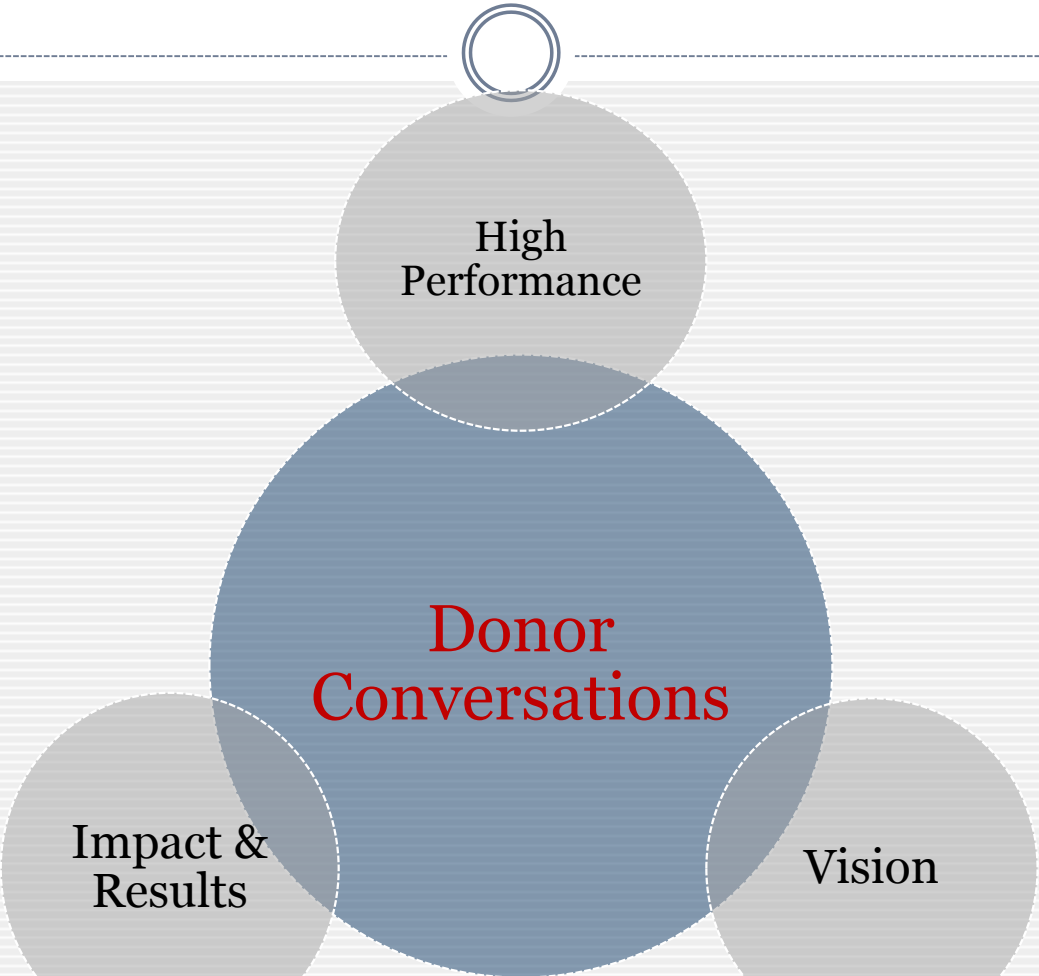
Use **stories**
to bring
your
program to
life.

Celebrate
your
donors as
your
heroes.

Conclusion



Sustainable Fundraising ↔ Social Sector Excellence



Social Sector Excellence

Questions and Thank You



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