The FUNDamentals of Relationship Fundraising

Mark L. Duncan, CEO & Fundraising Coach www.thefundcoach.com



Two Basic Approaches to Fundraising

Why Relationship Fundraising Works

What to Expect:

The "Rights" of Relationship Fundraising

The Relationship Fundraising Method



Two Basic Approaches to Fundraising

bottom up

- raise awareness
- capture attention
- tell a compelling story
- encourage action (giving!)
 - time
 - treasure



top down

bottom up (casting the net)

• events • driven by data • expensive • low return, but important



 direct mail social media

• newsletters

• emails

top down (selective and strategic)



 leverages relationships focused on individuals • warmer trusting • bears the most fruit

Why Relationship Fundraising Works

In 2020, \$471 billion was given to US charities.

Close to 80% came from INDIVIDUALS



declined 6.1 percent from 2019.





\$471.44 billion

In 2020, Americans gave \$471.44 billion to charity, a 5.1% increase over 2019.

Where did the generosity come from?

Contributions by source

By percentage of the total

The "Rights" of Relationship Fundraising

The right person asking the right prospect for the right amount for the right project at the right time in the right way.

Paraphrased from Stanley Weinstein – The Complete Guide to Fundraising Management



A six-step donor-centered engagement strategy that builds relationships to convert individuals from transactional givers to generous relational donors to your mission.





3. ENGAGE & THE RELATIONSHIP BUILD RAPPORT

5. CLOSE THE DEAL







6. ACKNOWLEDGE GENEROSITY



PROSPECTING



donors • Research • the BOARD!

Looking for Mr./Ms. "Right" • Database/small gift

- Leads (mailings, events)
- Home gatherings

- Confirm prospect's likelihood (link, interest,

 - ability)
- Wealth Screening • Philanthropic history

VERIFY CAPACITY



Swipe Left or Right?

ENGAGE & **BUILD RAPPORT**



- Secure first visit
- Listen, listen, listen
- Teach them about your mission
- Document (your database is your fundraising
 - archive)
- Plan the ask (think about those "rights")

The "Courtship"

MAKE THE ASK



- - Yes!



Popping the Question • Should be well scripted, direct, and specific • Be prepared for: • No (could also mean "not now")

• Need to think about it

CLOSE THE DEAL



- Before the meeting ends, ask
 - the magic question "when
 - would be a good time to
 - follow up?"
- Don't leave the meeting
 - without establishing the next
 - date of contact
- Details, details, details

The "answer"

Break Out Session





ACKNOWLEDGE GENEROSITY



you!!)

next "ask"

Happily Ever After Acknowledge the gift (Thank

- Naming opportunity • Ground breaking Establish a plan to keep the donor engaged • Periodic visits to convey ROI • Continue to stay engaged for

Questions?



