
Annual Giving Virtual Workshop

Presented by Michelle Buchanan, Dini Spheris
PSC Nonprofit Center for Excellence and Philanthropy

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Dini Spheris Presenter



Michelle Buchanan, CFRE, Principal

- *16 years consulting at Dini Spheris for nonprofits across the nation.*
- *Prior to joining the firm, Michelle spent 18 years as a fundraiser in organizations such as the UT MD Anderson Cancer Center and the University of Houston.*
- *Professional experience includes strategic planning, multi-million dollar capital campaigns, annual giving campaigns, planned giving, donor relations and stewardship.*



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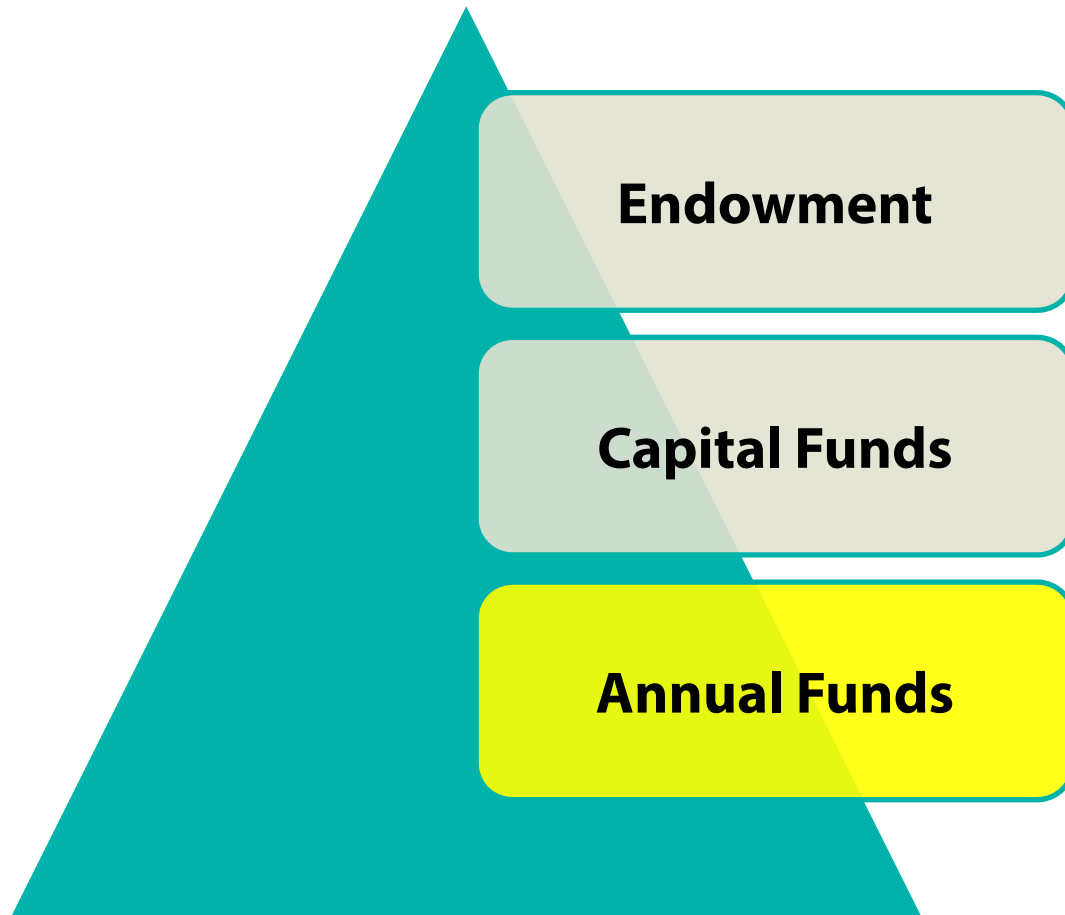
Today's Discussion

- Annual Fund Defined
- The Stages of Annual Fundraising
- Mechanics of Building Your Annual Plan
- **BUT FIRST YOUR EXPECTATIONS AND QUESTIONS!**



Annual Fund Defined

The Giving Pyramid



A High Performing Annual Fund

- Culture of philanthropy
- 100% board and staff giving
- Segmented donors
- Donor cultivation and communication plan
- Diversified fundraising options
- Donor progression
- Volunteer involvement



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Best Practices

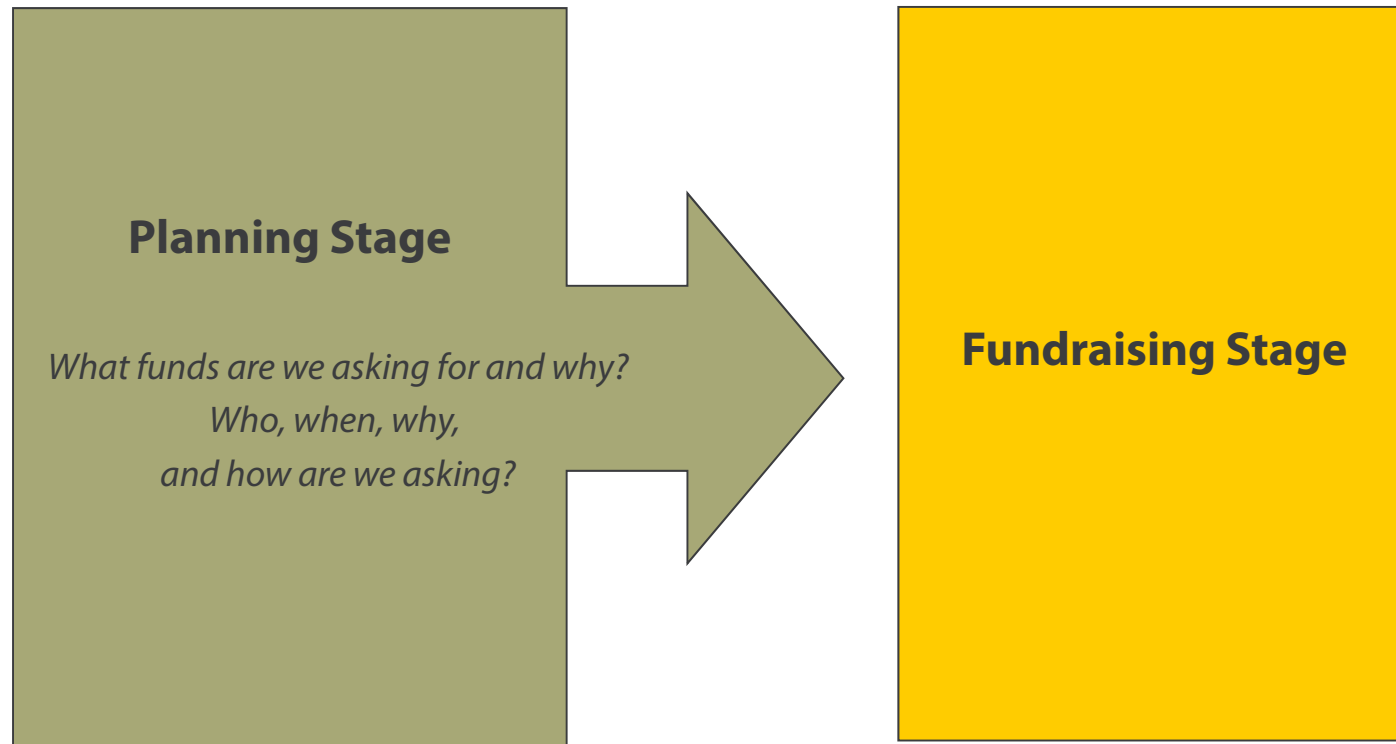
- Sixty to seventy percent of renewing donors are retained year-to-year. Ten percent upgrade annually.
- Lapsed donors are reviewed and a renewal strategy is developed.
- The specific strategies are developed for:
 - LYBUNT (Last Year But Unfortunately Not This Year); and
 - SYBUNT (Some Year But Unfortunately Not This Year) donors.
- Predictable, automated timeline is complimented by personal outreach.



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The Two Stages of Annual Fundraising

Two Annual Fundraising Stages



Planning Stage Components

- Organizational mission, vision and operating plan summary
- Fundraising objectives and needs
- Roles and responsibilities of staff/volunteers
- Cultivation plan
- Stewardship plan
- Ways to give



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Case for Support

- Tells the story of the organization and explains funding initiatives.
 - Features and benefits
 - Impact versus needs
 - Impact stories, measurable outcomes, why does this matter?
- Use the case to teach the board, volunteers and staff the story.
 - Elevator pitch
 - Materials



The Fundraising Stage: Identification & Segmentation

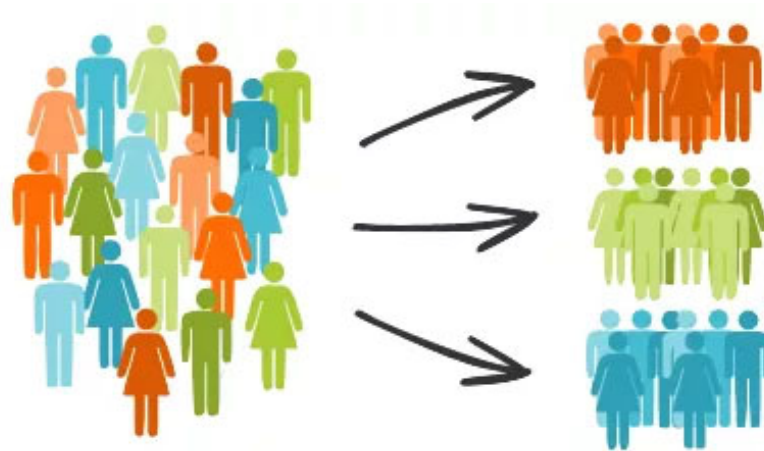
Identifying & Segmenting Prospects

- How recent is the gift
- Frequency
- A relationship
- Charitable nature
- Prospect capability and capacity



Segmenting Individual Donors

- Cluster past (and potential) donors.
- Determine which donors receive which type of solicitation.
- Review solicitation lists with major gifts program.



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The Fundraising Stage: Solicitation

Annual Funding Opportunities

- Corporate sponsorships
- Gifts in kind
- Grants
- Personal solicitations
- Phonathons
- Mail
- Membership
- Product sales
- Special events
- Web based – ephilanthropy
- Text to Give



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Strengthening Annual Fundraising: Direct Mail

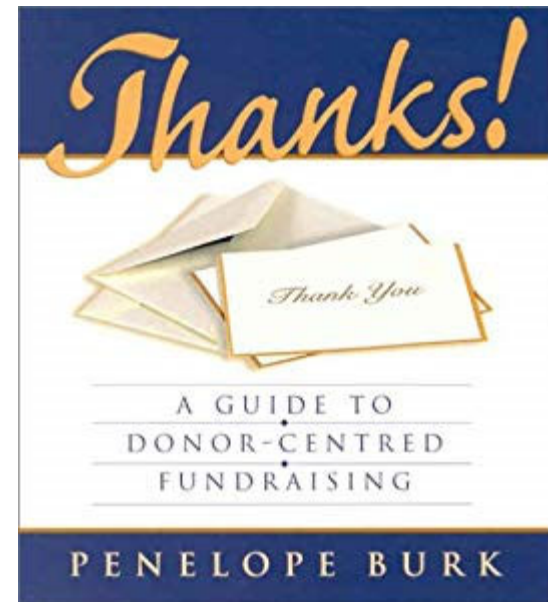
- Personalized letter campaigns:
 - Who is signing?
 - What are you asking for?
 - Why will this make a difference?
 - When do you need the funds?
 - How much are you asking for?



The Fundraising Cycle: Stewardship

The Stewardship Plan

- Documented strategies to continually engage, inform, and thank donors for their generosity and involvement.
- Be creative!
- You cannot say thank you enough.
- Consider implementing a stewardship calendar.



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The Mechanics of Building Your Plan

The Mechanics of Building Your Plan

- Start with your existing Calendar.
- Determine when & how many times will you appeal to donors.
 - Example:
 - Mid Year (June/July – Actually good for Direct Mail)
 - Giving Tuesday
 - Year - End



The Mechanics of Building Your Plan

- Start planning your theme/message/case for support.
 - Work with your Communications team.
 - Think about 1-3 years at a time – build on your stories.
 - Build your compelling client stories.



The Mechanics of Building Your Plan

- Segment donors and determine methods of outreach for each.
 - Example:
 - \$1 - \$999 – Direct Mail Solicitations and Follow up emails
 - \$1,000 - \$4,999 – Personalized Letters and follow up phone calls by staff or volunteers
 - \$5,000 - \$9,999 – Personalized Letters and follow up phone calls
 - \$10,000 - \$24,999 – one on one visits – leave annual letter with them.



The Mechanics of Building Your Plan

- For Major Donors (\$50,000 and up), plan very personalized tours, visits, lunches – the solicitation should never be a surprise!
- Remember your events play a major role – with some donors, this is their annual gift.
 - Utilize text to give for guests of sponsors/donors.



Check-In Questions

- How much did you raise?
- Did you follow the plan?
- How will you do it better?



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