

Cycle of Fundraising



This exercise reduces resistance by helping people move past the idea that fundraising equals asking for money. You can create a menu of ways everyone—board, staff, volunteers, donors—can participate, even if they're unwilling to be askers. If you want to develop a fundraising culture throughout your organization, this is a great way to start.

Why Do This Exercise?

It's an easy first step to creating a model for strengthening relationships with your donors

Use This Exercise When

You want to emphasize that asking for gifts is only a small part of a larger process

Time Required

60 minutes

Audience

All participants in your fundraising campaign: some combination of board, staff, and volunteers

Setting

A space large enough to accommodate several small groups of three to five

Materials

- Flip chart paper and markers
- Three handouts: Cycle of Fundraising, North Lakeland Discovery Center Donor Engagement Menu, and Cycle of Fundraising: Building a Donor Engagement Menu (See pages 44-46)

FACILITATING THE EXERCISE

1. Photocopy the handouts in advance.
2. Share copies of the Cycle of Fundraising handout (page 44) with your trainees. Explain that this is a simple map for creating healthy, mutually beneficial relationships with donors. Note that only a fraction of the work is asking for money. Most of the cycle is about what happens before and after asking.
3. As a warm-up for the small group work to follow, ask the full group to brainstorm one or two activities that might fit into each phase. For example, "What are some of the ways we might identify prospective donors?" (Two possible answers: compile lists of friends, and review published donor lists from peer organizations.) Ask similar questions for each phase

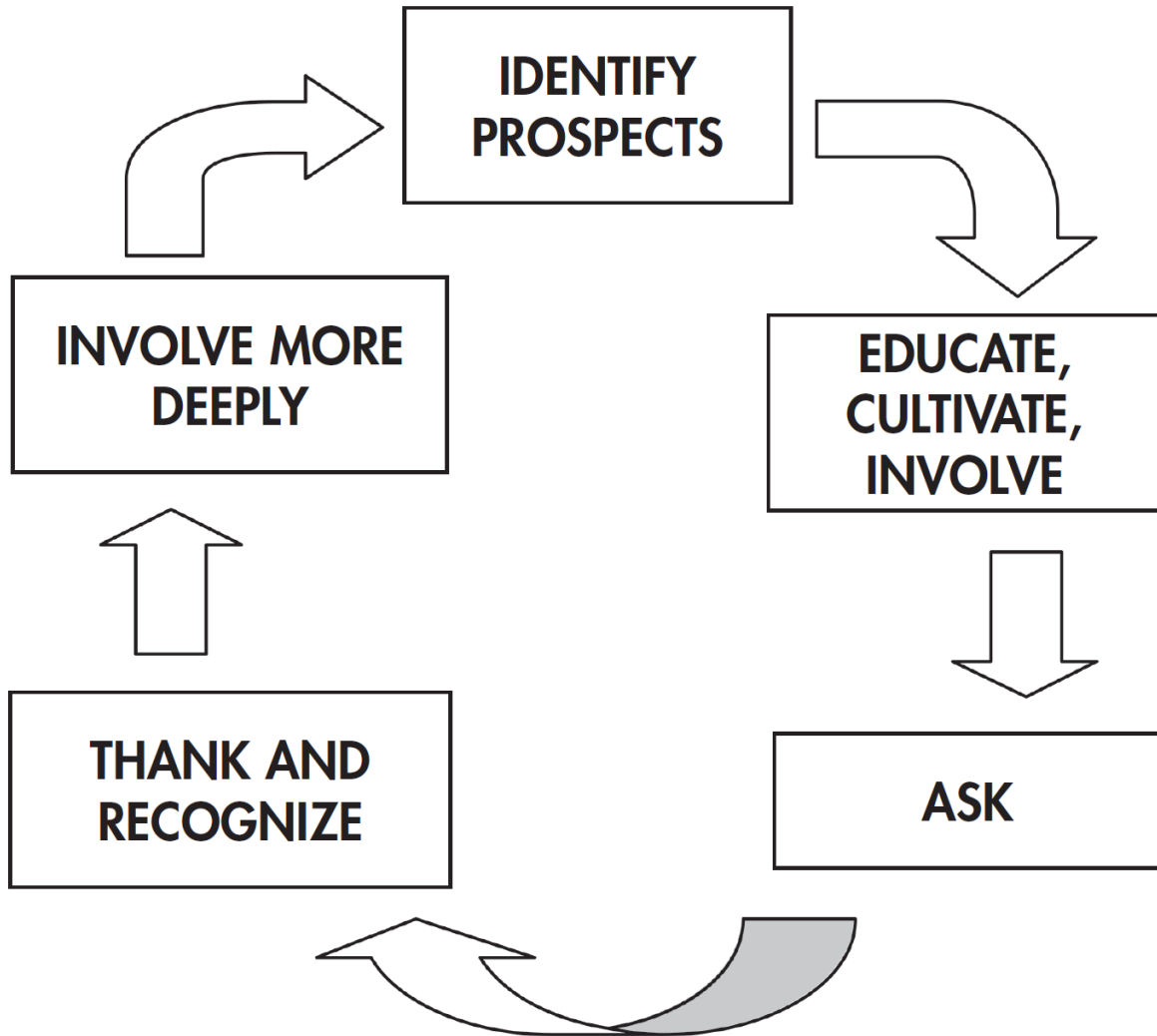
of the donor cycle—“What steps could we take to educate and cultivate donors?”—encouraging an answer or two for each phase.

4. Once the large-group brainstorm is complete, distribute copies of the donor relationship menu developed by the North Lakeland Discovery Center (page 45). Explain that it was created by board and staff working together. Give participants a few moments to review the handout and ask questions.
5. Ask your colleagues to form small groups of three to five. Share copies of the worksheet *Cycle of Fundraising: Building a Donor Engagement Menu* (page 46). Ask each small group to fill it in, brainstorming one stage of the cycle at a time: “What are our different options for identifying prospects? Fill in the relevant box. How about educating and cultivating those prospects?” And so on. Let them know they will have about fifteen minutes to complete the worksheet.
6. While the small groups are brainstorming, write the following titles—one per sheet—on flip chart paper:
 - Identify Prospects
 - Educate, Cultivate, Involve
 - Ask
 - Thank and Recognize
 - Involve More Deeply
7. After about fifteen minutes, reconvene everyone into the large group to report their work. Begin by collecting all the items for Identify Prospects, writing them on the relevant flip chart page. Then collect the items for Educate, Cultivate, Involve. Capture all ideas for each stage in the cycle before moving to the next.
8. To debrief this exercise, use some combination of the following questions as you discuss each flip chart page:
 - Which of these tasks are we already doing?
 - What steps do we need to focus on to improve our donor relations?
 - Are there any specific tasks you would like to help with?
9. To conclude, draw a large circle on a piece of flip chart paper. With the help of the participants, divide the circle into a pie chart graph indicating how much time your organization should spend on each of the five functions. For an example, see page 47.

As you wrap up, ask for a volunteer to transcribe your flip chart notes into the Cycle of Fundraising template. It will provide a simple one-page map outlining your donor identification and engagement strategy. It also creates a menu of ways everyone in the organization can assist with fundraising, including many ways that don't involve asking.

TRAINING TIP Templates help people understand new concepts in a tangible way. While not necessary, we have found that reviewing a completed template (see next pages) helps people build a model that fits their own organizations. We have tried this exercise both ways—sharing the template first vs. allowing the group to build its own from scratch—and can vouch that using the template early in the exercise is very helpful.

Cycle of Fundraising





Cycle of Development: Expanding Your Connection

*Naturally Inspiring and Enriching Lives through Meaningful Connections with
Nature, People and Community*

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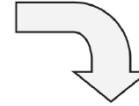


Inclusive Involvement

1. Train volunteer-donors to give Center tours
2. Ask donors to assist, lead or invite them to programs and events.
3. Invite donors to join Board, committees or focus groups.
4. Ask donors to write a story for newsletter on personal importance of DC.
5. Ask donors to host house parties in concert with board members, and to make intro/open doors.
6. Ask donors for feedback on planning, fundraising, and other organization-wide initiatives.

Identify Prospects

1. EAD and Staff identify potential foundation grants.
2. Seek and refer board members with fundraising experience.
3. Actively seek potential donors/volunteers.
4. Review donor lists for potential donors who have given to similar organizations.
5. Have a designated person(s) to talk to referrals.



Educate and Cultivate

1. Develop the why through an "elevator speech". Train staff and board.
2. Host donor dinners and events with time dedicated to the DC story.
3. Tours—train ambassadors on "elevator speech."
4. Ask donors to talk to donors, and provide opportunities for roundtable discussions.
5. Create Q&A with common questions, and include how to learn about upcoming events, who to call to be involved.
6. Articles and photos in newsletters (e.g., bequests, memorial gifts; personal stories from participants).
7. Seek out media attention for grant receipts and DC story-telling opportunities.



The System: *A volunteer and donor tracking database is key to providing personalized attention and to communicating respectfully.*



Thank and Recognize

1. Board makes quarterly calls to new donors \$250+.
2. Informal thank you's (e.g., at event or program).
3. Invite and recognize sponsors, item donors and volunteers at summer recognition events.
4. Host Voyageur Dinner and Member Appreciation Night/Annual Meeting.
5. Publicize names of supporters in annual flier and otherwise as appropriate.
6. Send donors CDs, DVDs and other visual gifts thanking them.
7. Personalize gifts and notes.
8. Encourage attendees at events to patronize supporters and sponsors – and frequent their establishments yourselves.



The Ask

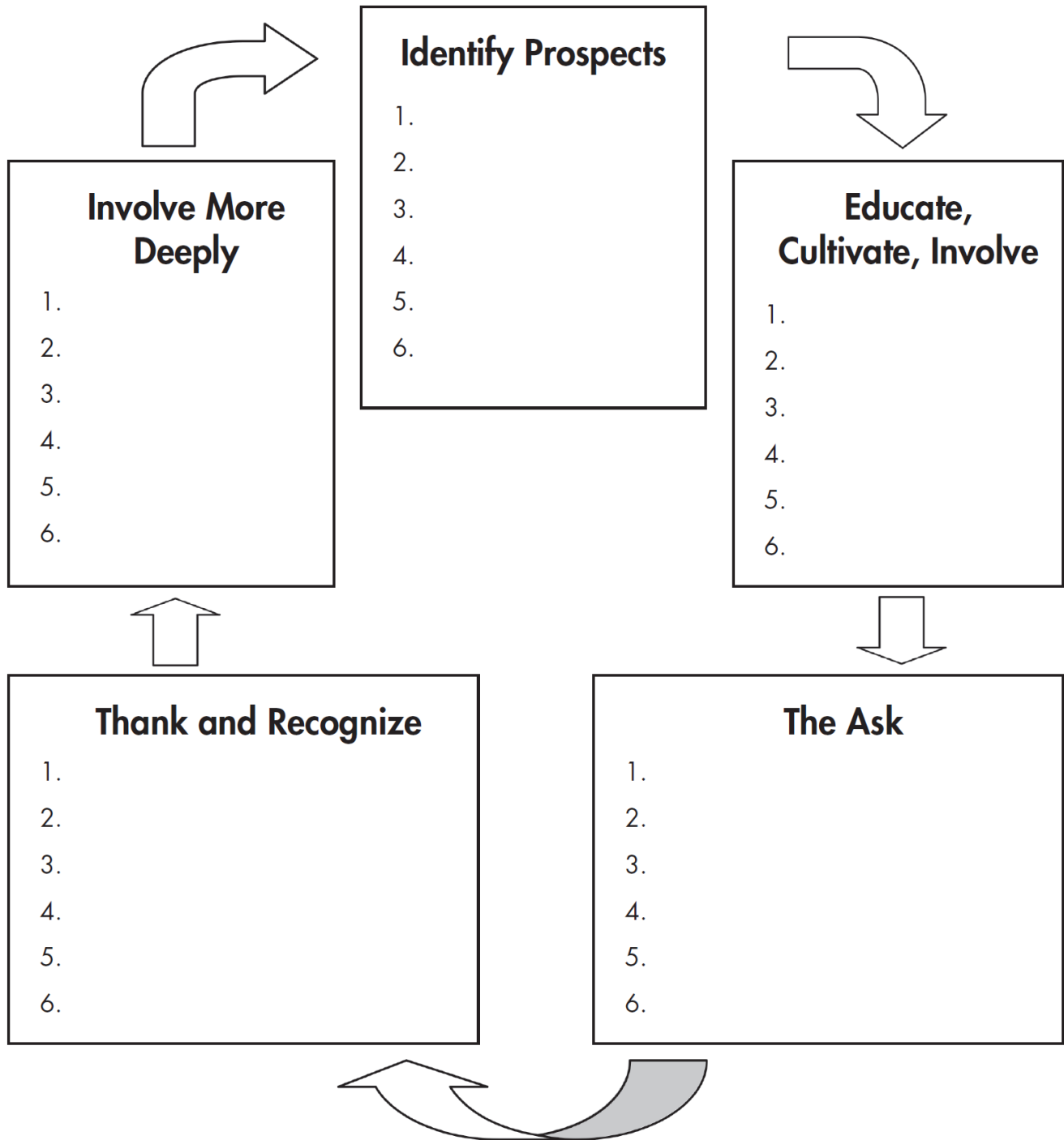
1. Face to face visits (collaborative)
2. At house parties and other events as appropriate.
3. Website, email and social media asks.
4. Letters (e.g., sponsor) and follow up calls.
5. Identify challenge or matching donor gifts.
6. Make calls supporting a special event.
7. Solicit/give items for silent or live auctions.
8. Recruit new members.



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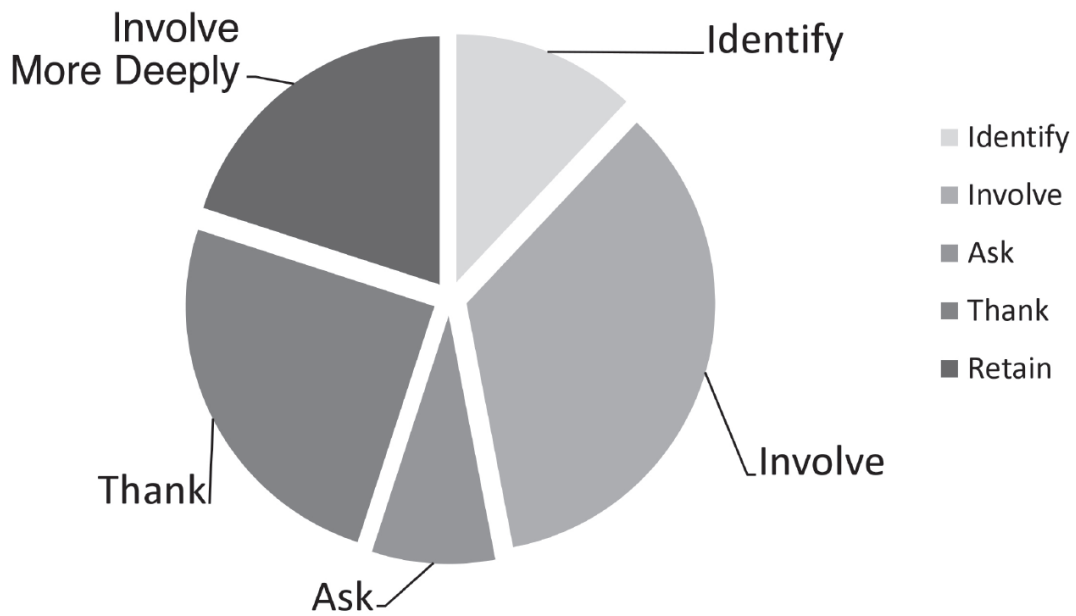
BUILDING A DONOR ENGAGEMENT MENU

Create a menu of activities for each stage of the relationship:



Cycle of Fundraising Time Allocation

Breakdown of Time Spent on Each Phase of Fundraising Cycle



Adapted from Tina Cincotti, Funding Change Consulting.
Used with permission. Thanks, Tina!