

Revealing Your Luster: The PEARLS to Fundraising for Your NPC

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Overview

- ▶ Common Themes
- ▶ Case Studies – NPC examples
- ▶ Brief overview of the Handouts
 - ▶ 5 Fundraising Tips (Sheff article)
 - ▶ “Fundraising Operating Plan”
 - ▶ Fundraising Tips
 - ▶ Beach Memo
- ▶ Questions

“5 Fundraising Tips— Straight from Donors and Grantmakers”

by Rachel Stephenson Sheff

- **#1 Don't try to make the shoe fit (when it's clearly never going to fit)**
 - Qs: is there alignment between your “Ask” and their priorities? are you even eligible to submit?
- **#2 Build genuine relationships**
 - “Patience” to “demonstrate passion, energy, focus and competence”
- **#3 Frame Prospects as Partners—not “cash registers”**
 - Partners who want “to provide thinking and strategy”
- **#4 Remember: you're solving the Donor's “problem”**
 - They've got \$\$ they need to spend – you're “taking your donor on their journey”
- **#5 Avoid the mistake... of avoiding mistakes**

“Gem” to walk away with: “donors are *people*” and you are executing an excellent fundraising strategy that will help make their lives *easier*





CampaignforAction.org

Fundraising Operating Plan Template

- ▶ Set your **Core Objectives** for the coming year along with the Strategies to achieve each Objective
 - ▶ Raising \$5,000 for the Education mission
 - ▶ Forming a Development Committee / Advisory Board
 - ▶ Developing a brochure, enhanced web presence, and Community partners

Set your Core Objectives for the coming year along with the Strategies to achieve each Objective
- ▶ Determine your **Budget**
- ▶ Set your **Calendar**
- ▶ Outline **Specific Implementation Steps** with Assigned Roles and Due Dates

Okay, this is great!

I've got a sketch of my Plan in place... what do I do now?!





Some Reminders and Suggestions

➤ **Making the Connection**

- Empower your network to “work” for you – particularly your Board
- Align your Need with their Priority to identify Prospects
- Be sure you can pull it off

➤ **Making the “Ask”**

- Practice across team members, Board, PIs – develop the best “story”
- 3 Cs must control [just ask my law students!] – Clear, Concise, Compelling

➤ **Maintaining the Relationship**

- Invitations to speak or attend go a long way, as do Current Events
- Seek advice and referrals without an “Ask” for money being involved [yet!]
- Offer your help!

Mentors Lead the Way!



Bill Beach

Bill is the Founder and Chief Executive Officer of The Beach Group LLC. He is approaching his 30th year in fund-raising and executive search. Prior to establishing The Beach Group LLC, Bill served The John Marshall Law School in Chicago, IL, as a consultant, Assistant Dean and Associate Dean for the Office of Institutional Development. At John Marshall he directed the most successful campaign in the law school's history.

Bill's clients have included The Chicago Police Memorial Foundation, The Drug Enforcement Administration Educational Foundation, VanderCook College of Music, The John Marshall Law School, The Hundred Club of DuPage County, and Smart Beginnings Virginia Peninsula.

In addition to campaign management, Bill has extensive experience conducting feasibility studies, strategic planning, planned giving, corporate and foundation relations, major gift solicitation, and annual fund enhancement.

As an executive search consultant, he has managed hundreds of nationwide search assignments for Fortune 500 companies as well as for small, privately held organizations.

“The Beach Memo”

1. There are only four sources of money.
 - Individuals
 - Corporations
 - Foundations
 - Government
2. You must be able to answer three basic questions that will be on the mind of everyone you speak with about making a gift.
 - Where is the money going?
 - Who decided?
 - What are you looking for me to give?
3. You must do in-depth research on your prospective donors. The strategy for philanthropic potential is critical. You must be able to make an intelligent ask for money, and to do so, you need to know what it is that motivates an individual, corporation, foundation, or government to give, as well as what their capacity is to give.

Don't only pursue the wealthy; also pursue the willing.

4. Everyone affiliated with your organization, whether it is your Board, Advisory Board, Development Committee, or staff, must have a fervent belief and passion for your organization and mission. Your organization must be one of the top one or two philanthropic priorities of each board member, and staff.

If it isn't, why should it be a priority for anyone else?

“PEARLS” of Wisdom?

- Promote
- Evangelize
- Advocate
- Reveal... then Remind!
- Luster – let it *shine*!
- Sell... Sell... Sell!

REMEMBER: The quality of a Pearl is based on its
sharpness and ***brightness*** – how well it ***reflects***



Let's connect!

- Kevin.Hull@va.gov or when you're next in Chicago!

