

Fundraising matters

Quarterly Newsletter for the Utah Society of Fund Raisers

March 2009

FUNDAMENTALS OF FUND RAISING CONFERENCE APRIL 23, 2009

WESTMINSTER COLLEGE SPECIAL EVENTS ROOM

Located on the lower level of the George S. and Dolores Doré Eccles Health, Wellness and Athletic Center

Registration: 8:00 a.m.

Sessions: 8:30—3:30 p.m.

Continental Breakfast and Lunch Provided

COST: \$50 USFR MEMBERS / \$75 NON-MEMBERS

This one-day conference is designed specifically for development staff with less than two years experience in fund raising, other employees who work alongside the development team, and college students considering careers in the rewarding profession of fund raising. Please encourage colleagues who may be interested to register for this valuable bi-ennial conference.

SESSIONS:

- ◆ **Annual Fund—Building the Strong Foundation**
Kathryn Brussard, Catholic Community Services
- ◆ **How to Plan and Execute Special Events and Engage Volunteers**
Safia Keller, Westminster College, and Barry Bonifas, formerly of SUWA
- ◆ **Building a Strong Working Relationship with Your Board and Leadership**
Beth Stratham, YWCA Board President, and Anne Burkholder, YWCA Exec. Dir.
- ◆ **Building Relations with Corporations and Foundations**
Denise Winslow, Wells Fargo, and Aimée Dunsmore, Ballet West
- ◆ **Finding and Cultivating Major Gifts**
David Driggs, Utah State University
- ◆ **Planned Giving—What It Is and How to Market It**
Julie Geilman, LDS Philanthropies
- ◆ **The Importance of Strategic Planning to Your Overall Mission**
Shane Cragun, The Cornerstone Group



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Visit the USFR website at www.usfr.org
for additional articles, resources, tips, and more...

TOP TEN BENEFITS OF USFR MEMBERSHIP

Devra Andersen, Director of Stewardship and Gift Management
Westminster College

1. Professional development
2. Networking
3. Shared resources
4. Advocates for the profession
5. Quarterly workshops showcasing national speakers
6. Members receive a discount on all workshops and lunches
7. Committed to offering cost effective, worthwhile professional training
8. Tools to help you be more productive and successful
9. USFR has been around for 30+ years
10. Your *individual* membership last a full-year

NON PROFIT COMMUNITY CALENDAR

March 2009—June 2009

March 2009

- 26 5th Annual Health Care Professionals Night at the Ballet
- 26 Envision Utah—Annual Corporate Friends Breakfast
- 28 Ririe—Woodbury Dance Company Cabaret of Fools Gala Benefit
- 28 Oulessebougou Utah Alliance Annual Dinner Auction
- 29 Bowl for Kids Sake 2009—BBBS Southern Utah
- 31 Dreambuilders Breakfast—Catholic Community Services
- 31 Guadalupe Schools—Fund Raising Lunch

April 2009

- 11 YWCA—Physicians for Human Rights 5K Fun Run/Walk
- 11 Bowl for Kids Sake 2009—FatCats in Ogden
- 16 The Deseret Foundation's 2009 Legacy of Life Gala
- 17 2009 Legacy of Life—Scientific Achievement Conference honoring G. Michael Vincent, MD
- 18 Utah Museum of Natural History Annual Fund Raising Gala

April 2009

- 23 USFR Fundamentals of Fund Raising
- 25 The Spirit of Children Gala
Organization: Ronald McDonald House Charities

May 2009

- 1 2009 Bravo! Award Gala—Pioneer Theatre
- 2 Celebrate The City The 20th Anniversary Restoration of the City and County Building Gala and Preservation Fund Raiser Gala
- 13 USFR May Program & Annual Meeting
- 15 Utah Museum of Art—Fine Arts in Bloom (through the 17th)
- 16 Chef & A Child Gala Big Brothers Big Sisters of Utah

June 2009

- 8 AMICUS Open-The Deseret Foundation

To find out more about these events
or to post your event, visit our
website at www.usfr.org



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from members are welcome.

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dues are \$50.00.**

For more information
about how you and
your organization can benefit
through membership in **USFR**,
log on to our website at
www.usfr.org

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**For additional information,
please contact:**
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Dear USFR Membership,
As I began to consider how I should address our membership this month, I found myself at a bit of a loss. I wondered, “What does our membership need in this moment of financial uncertainty?” I asked several of my colleagues for their advice, and one suggestion rose to the top, that of Thanksgiving Point Institute's Development Associate, Jason Myers. When I remarked to Jason that I thought folks could really use a healthy dose of humor and hope (in addition to lots and lots of donations, of course), Jason recommended that I consider providing you with a “Top Ten” list that would provide insight, perspective and most importantly—a few good laughs. So here you have it...Enjoy!

The Top Ten Reasons to be a Fund Raiser during an Economic Meltdown
(courtesy of you very own USFR Board Members)

1. You always liked the name Polly-Anna.
2. You're not worried anymore about whether the glass is half full or half empty—you're just drinking the darn thing.
3. You don't have to wait in check-out lines or worry about looking your best at the grocery store anymore, because all your donors are avoiding you *and* the stores.
4. People caught up in a collective crisis become more receptive to that which ultimately matters most in life, namely the nourishment the bodies and spirits of our fellow human beings. Non profit organizations are the primary vehicles by which they can act on their feelings, and our work is more relevant than ever.
5. You have an opportunity to say “thank you” and mean it, because you realize how much each penny really does count.
6. Because every little bit of good news is enough to make you work hard for at least a week!
7. You start laughing like a maniac when you get a “no,” because it is so sad that it is funny.
8. Your mom will start donating to your cause...finally...but only because she doesn't want you to lose your job.
9. President Obama will fix it!
10. Because you make so little money and have no personal stock portfolio—you have nothing to lose!

Merridith

Merridith Ferne
USFR President

USFR CALL FOR NOMINATIONS
BOARD OF DIRECTORS AND COMMITTEE MEMBERS

If you or someone you know would be interested in serving on the Utah Society of Fund Raisers Board of Directors or on a USFR Committee, please provide names, contact information, and a brief statement of qualifications to: Dale Snyder, at dale.snyder@tpl.org, or mail to: Dale Snyder, State Director of Development, The Trust for Public Land, 323 South 600 East, Salt Lake City, Utah 84102.

The USFR Board term of service is three years and includes a monthly two-hour meeting, one four-hour annual retreat, and a committee assignment. Committee membership term of service is one year and includes meetings as necessary.

PLEASE SUBMIT NAMES FOR CONSIDERATION BY MARCH 16, 2009.



WE WANT YOU!

EVENT PLANNING IN A DOWN ECONOMY— MARTHA STEWART STYLE

Ashlee Rauzon, Director of Events,
Westminster College



During this economic crisis, event planners are finding themselves in a challenging position. We are accustomed to spending money in lavish and extravagant ways to “sell” our organizations and businesses. However, at the moment, every organization is being analyzed and having their budgets slashed. Creative and extreme measures

are being taken to save money. I predict 2009 to be the year we all discover our inner *Martha Stewart* and begin recycling, reprocessing and reusing.


As professionals, we are able to acclimate and become accustomed to thinking differently and creatively. I do not see this as problematic. On the contrary, I think we can take advantage of useful items and resources we already possess.

Small changes can make a huge difference in the cost of events. Such changes may include negotiating more aggressively with caterers and vendors, and brainstorming menus and locations that can significantly lower cost, while still providing a quality experience.

A few saving solutions:

- Combine events that have a similar purpose and audience
- Take advantage of already planned events within your organization—“kill two birds with one stone”
- Send invitations and save the dates via email
- Conduct the majority of your marketing on the web
- Replace dinners and luncheons with receptions
- Create your own centerpieces with items you already own
- Consider replacing flower arrangements with votives
- Replace flower arrangements with frames containing information about your organization or business (it decorates the space as well as informs your guests)

By implementing a few easy changes and becoming more creative, you may be able to reduce your cost a great deal.

In the end, I am confident you will see a significant aggregate effect. 

STRATEGIES FOR FUND RAISING IN 2009

Phyllis Hockett, CFRE
Pathway Associates LLC

- ◆ Internet technology has significantly impacted the way in which donor relationships are built and maintained. Social media applications are available at a minimum of time and cost. Thirty-five percent of the millions of networking users are adults. These sites broaden your reach and allow you to have a dialogue with your supporters.
- ◆ Your Board of Directors may want to write a candid letter to volunteers and donors detailing the organization’s financial standing and plans for the near future. Assure donors that you are impacting individual lives, collaborating where possible, and maximizing individual donations.
- ◆ Compared to a year ago, the non profit community is approximately 20% to 30% poorer in terms of resources. Every endowment has been impacted. You may want to reconsider what skills are most important as you recruit new board members. Now it is even more important to engage people who know how to conduct audits, understand financial issues and take seriously their responsibilities to oversee the use of contributions and other resources.
- ◆ “Seven of the 10 largest U.S. charitable gifts in 2008 came from the estates of deceased donors, a sign that the flailing economy may have deterred living philanthropists from writing big checks,” according to a new survey by Slate. Be flexible with donors. Invite them to make a pledge, wait for better timing for a large capital gift, or make a planned gift. Ask donors to check a box in fund raising materials if they are interested in leaving a long-term gift to your organization.
- ◆ Communicate often – in person - with your donors. Do not fear that you will offend them by asking for funds. It is more important than ever to talk with your donors about the legitimate and immediate needs of the people you serve. Describe how their giving enables your organization to makes a significant contribution to the public and society.
- ◆ Begin to “future-proof” your organization. Think strategically and systematically about a variety of potential outcomes to the current economic challenges. Non profits can develop more robust and flexible strategies, make better decisions, pursue new directions, and adapt in a rapidly changing world.

USFR MEMBERSHIP LASTS A FULL YEAR


Nancy Brown, Director of Development
Salt Lake Community College

As members of USFR, you already know about the terrific membership benefits we offer. You attend the professional development luncheons and special training workshops. You receive our job announcements and this newsletter. You have access to the “members only” portion of the web site where we publish our membership directory, resource packet, mentoring program information, and notes from our meetings. For the annual \$50 membership fee, this organization helps you do your job better!

Now, your membership benefits last a full twelve months.

That’s right, the USFR Board voted to extend membership benefits for a full twelve months from the date you join or renew your membership to USFR. The date you join or renew will be your anniversary date, and we will remind you to renew on your anniversary date each year.

USFR is committed to supporting the non profit industry in Utah and helping you maximize your training budget. As a dues-paying member of USFR we want you to receive the full benefits of a membership. Eliminating the fall membership year and extending benefits based on your anniversary date will ensure that you seamlessly enjoy the benefits of USFR all year long!

Not sure of your anniversary date? Send a message to info@usfr.org to inquire. 



A LITTLE VOLUNTEERISM AND OUTREACH CAN GO A LONG WAY

David Jensen, CPRW, CARW, CEIP
Ascension Writing Services

The University of Utah marching band’s invitation to participate in President Barack Obama’s inaugural events was a morale booster for the University and the entire state of Utah. Still, the news of this honor was nearly upstaged by the story of how the band was able to make the trip to Washington D.C. In addition to the outpouring of donations from students, alumni, and philanthropists, residents in Virginia helped make the trip possible by graciously opening their homes to the band members. The outreach effort proffered by these people who rallied to help the band participate in this historical event was a genuine display of hospitality and community service.

Our uncertain economy heightens the need for community service. During his inaugural address, Governor John Huntsman Jr. commented on the spirit of community that exists in the state of Utah.

“As a state, we are known for our commitment to volunteerism and outreach to others,” he said. “Our success in the challenging months ahead will require a little from all of us.”

On a global scale, the companies who will feel the biggest pinch of a brittle economy are non profit organizations. However, it’s the constituencies of these service providers who will really feel the impact of the cutbacks. Many non profit organizations are on the front lines of providing an essential service to those who need it the most. Non profit companies rely heavily on volunteer support in order to continue providing their services.

“Our program requires \$2.7 million of in-kind participation each year in order to keep our organization and programs operating,” said Erin Trenbeath-Murray, Director for Salt Lake CAP Head Start. “This comes primarily from community members and parental volunteers.”

Volunteerism is also a requisite need within USFR. The USFR committees are encouraging all members to embrace Governor Huntsman’s community service pledge by giving a little of their time and talents. 

USFR/UPGRT LUNCHEON SEMINAR— JANUARY 21, 2009

Lisa E.M. Himonas, Development Director
University of Utah College of Social Work



“The best gift is a straight, outright gift—no strings attached,” said Ms. Ashton .

Pick up the phone and make the call—before you clean your desk, check your email, and visit the water cooler. That was **Debra Ashton’s** advice to the crowd gathered at the January 21, 2009 luncheon seminar jointly presented by USFR and Utah Planned Giving Roundtable

(UPGRT). Procrastination was number seven on the author and planned-giving consultant’s list of “The 15 Hideous Reasons You’re Not Getting Gifts.”

I’ll just take care of this first . . .

In a no-nonsense, engaging presentation, Ms. Ashton counseled her audience to focus on the prime directive—getting gifts. She promised that the “snarly knot” in your stomach will vanish if you “make one phone call each morning to arrange a visit or orchestrate something” for the coming week.

Oh, my—look at the time!


Ms. Ashton pointed out that sometimes development folks spend way too much time cultivating donors—so long that they forget the prime directive. Other times, they can become the prospects’ good friends, blurring the lines that separate social and professional conversations. In both instances, a change in the dynamic is required.

It’s not about you.

While most people employed in the field of development were born, rather than trained, to schmooze, Ms. Ashton cautioned that it is important to listen to the wants, needs and interests of the donors. Do not focus on yourself—don’t talk too much; listen to the donor so that you know their interests or who helps them make financial decisions. Take into consideration that you might not be the right person to ask. And while contemplating all of this, don’t let your own fear of rejection stop you from asking for the gift.

Think about it.

Before you ask for a gift, however, it is important that you and your organization have a plan. Ms. Ashton advocated for having a strategy—there should be institutional goals, a plan for working with each donor, pre-proposals brought to meetings, and appropriate follow ups.

Above all, you have to ask for “the gift”—if all goes well, it will be the right gift for the donor, even if it is not the gift you planned. 

SAVE THE DATE! USFR’S ANNUAL MEMBERSHIP MEETING & LUNCHEON WEDNESDAY, MAY 13, 2009




USFR is excited to announce the date of its Annual Membership Meeting & Luncheon—Wednesday, March 13, 2009.

At our annual meeting we’ll not only approve our 2009-2010 Board of Directors Slate, but we’ll also be fortunate enough to hear from Marc Pitman, the author of *Ask Without Fear!* and founder of Fundraisingcoach.com, a website dedicated to practical ideas for fund raising more effectively.

Pitman’s address titled “**Successful Fund Raising When Most Giving is Going Down**” will help us to dig deep and focus on the fund raising fundamentals essential to riding out a tough economic climate. According to Pitman, “When the philanthropic climate gets shaky, we tend to panic, but we need not do so! The current conditions are driving us back to the fundamentals of fund raising: building relationships with people.” Pitman insists that “people will be making charitable gifts this year” and asks, “Will they be making them to you?”

Pitman will address the seven most common mistakes fund raisers make in these conditions, a simple three-step tool that will help you cut through all the messaging static, and a four-part system to structure your recession-proof solicitation.

Internationally recognized by such organizations as Reuters, the Canadian Broadcasting Corporation, the Chronicle of Philanthropy, and the American Marketing Association as a thought leader, Pitman helps individuals and organizations raise more money than they ever thought possible! His lively presentations at conferences and fund raising seminars get him invited to various organizations including Blackbaud’s Conferences for Non profits, Habitat for Humanity International, and the Association of Fund Raising Professionals.

He also has his own audio program and other tools to help you excel at raising money available at the Fund Raising Coach Store. 

Please stay tuned for additional information about our Board of Trustees nomination process and event registration.




USING SOCIAL MEDIA AS A FUND RAISING TOOL

Sara Brueck Nichols, Director of Public Relations


Operation Kids

Social media can either excite or terrify you. If you are like most professionals, it's somewhere in the middle. For non profits, however, social media strategies and tools can mean less expense, better relationships and wider opportunities for fund raising and support.

There are some key components to keep in mind when fund raising via social media, whether you are a fund raising veteran or novice:

- ◆ **Know your social media audience.** Not all social media tools are the same. Nor are the people using them. Know the tools' unique features and the unique characteristics of each of their audiences. 
- ◆ **Utilize multiple media types.** Take advantage of the fact that social media platforms, communities and tools allow video, photos, updates and blogs or notes. Utilize multiple media types to create an engaging campaign.
- ◆ **Quality vs. quantity.** There are thousands of platforms, communities and tools available. Don't get overwhelmed. Rather, focus your efforts on those that most specifically cater to the demographics and psychographics of your core supporters. Then, empower your supporters to share your campaign in the world beyond.
- ◆ **Produce and share compelling content.** Social media tools create opportunities for conversation. Produce and share content that inspires people to think, feel, and respond. Seek to inspire your audience to share and discuss. When you captivate and engage them, your campaign will come to life. 
- ◆ **Invest time and build relationships.** At its very core, social media encourages people to discuss and share. It takes time to build relationships, but in the end, developing relationships will improve the ability of your fund raising campaign to grow well beyond your core supporters.
- ◆ **Think individual vs. collective. Be specific.** The most successful social media fund raising campaigns are constructed to appeal to the individual. Tailor your message to appeal to the individual supporter, much as you would if sitting down with individual donor prospects. 
- ◆ **Encourage evangelism.** Make it easy – and compelling – for your supporters to become evangelists for your cause. Give them the tools, and inspiration, to easily share your content, fund raising goals and results with their own networks.
- ◆ **Start small.** If you are just starting a social media fund raising campaign, start small. Have a goal, a small target and a good idea of what has worked for other organizations in the past.

 twitter

Lastly, don't be afraid to fail. Sometimes, in the world of highly targeted marketing, the key to success lies in understanding what went wrong the first (or second) time. Of course, be sure to keep your supporters up-to-date and enlist their feedback. Chances are, one of them is the social media guru that you've always wished you were. 

Best-of-Social-Media Fund Raising:

Tweetsgiving: Raised \$11k in 6 days for a school in Tanzania via Twitter. "Only 6 out of 360 donors (< 2%) were previous donors to our cause, and I believe I've added about 500 new Twitter followers since Tweetsgiving began. Over 98% of donors were people who had never before donated to Epic Change." (-Stacey Monk, Epic Change) <http://tweetsgiving.org>

Help Daniela's Family: Raised \$12k in 24 hours to help a victim of domestic violence, who was the friend of a prominent blogger – via blogging, widgets and Twitter. "I don't have anything to offer back. Not an ego list or top donors directory. I can only hope that this thing we call 'community' puts its money or heart where its mouth is. Please do whatever you can." (-David Armano, Logic + Emotion) <http://tinyurl.com/8m42xc>

No Go Gala: Raised \$357,000 in lieu of holding an annual gala for Chrons/Colitis research. The organization decided to hold its annual gala "virtually" online, allowing the event's organizers to create personal fund raising pages to raise funds for the "event." The personal fund raising proved to be fun and competitive, and each person with a page competed against the others to raise the greatest amount of funds. The result: the average funds raised per committee member was \$11,129.83 and the top 3 committee fund raisers raised \$109,252. Over \$375,000 was raised in total. <http://renovatingforresearch.ca/>



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The Utah Society of Fund Raisers (USFR) www.usfr.org

is a professional organization committed to serving the fund raising profession in Utah through education, annual conferences, networking opportunities, trend updates, and many others services.

For more information about how you and your organization can benefit through membership in **USFR**, log on to our website.