

Meeting Notes from Tautoko Network Meeting June 2019

FUNDRAISING



Thank you to those who joined us at our *Tautoko Network: Supporting the Community* session today when Su Marshall shared from her experiences in fundraising

Su has been involved in fundraising for many years which means that she has broad experience across many types of fundraising activities. Over the last 14 years she estimates she has raised \$10m in grants plus other fundraising contributions for the charities she has been employed with over that period.

These days, Su is part of the SPCA'S 36-strong fundraising team which deals with bequests, community events, donations and gifting. The team is supported by a data team (because great record keeping is essential for any fundraising programme), a comms team and a graphic designer. Not part of the fundraising team are SPCA's opshops and social enterprise activities. The SPCA's operating budget is around \$42m - so, the team supporting that reflects that! Su noted though that every person who is involved with the SPCA together with their website and social media platforms, is integral to fundraising - they all contribute to raising the profile and telling the story of what the organisation is doing.

Asking for \$: Why should people gift to your organisation? Because it's a brilliant cause you believe in. There is a lot of competition, you will get knocked back a lot, but there are always people who you will find who want to support your organisation. You need to be prepared to tell people **WHAT** you do, **WHY** you do it, and **HOW** what you are doing is making a difference. Take every opportunity you can to get your story out there ... including website, social media.

Who to target: Check out the 'triangle' above ... acquisition of a bequest gifter starts at the bottom level of the pyramid. Once someone has given once, encourage them to regular gifting, and so on ... moving up the pyramid until you reach bequests/planned gifting.

Where to start: Start with the inner circle of your organisation:

- those who know you
- clients you are helping (if appropriate)
- families of clients you are helping
- don't patronise/assume people can't afford to donate; give people the opportunity to make that decision themselves.

Every person who supports you once (in some form) shows that they are on board with what you are doing - ask them again and again. This is how to build a regular 'giving programme'.

Read annual reports of other charities - where is their support coming from? People who support one organisation are *more than likely to support another*.

How to ask: phone call, visit, letter. Paper is King! The price of printing and stamp, in Su's experience, is worth it. Su used the example of active reading and relaxing reading: emails are usually 'active' reading; a piece of paper is often read in a more relaxed manner which lends it to receiving more consideration.

Make it easy for people to give: think: post-paid self-addressed envelope! Also consider more impersonal ways to ask such as website/facebook 'donate' buttons. If setting these facilities up, check in to not only the cost but whether the information selected can be yours (and not a third parties) which will enable you to follow-up. Even if you don't have a 'donate' button facility, include your charity's bank account details on your website with an invitation to donate - tell the donor to send an email when they have made a donation so you can send a receipt for tax purposes. To track fundraising events, check out platforms available, for example, <https://www.everydayhero.com/nz/> where in a few clicks you can create a fundraising page. If it is a one off fundraising event, get a team of trusted committed volunteers behind it - ensure you have got your support on board before you go ahead.

Sponsorship: Sponsorship from corporates in NZ usually comes out of a marketing (not philanthropic) budget. Don't sell your soul - make sure what your sponsor has on offer is aligned to what you want. Spread your eggs across many baskets - an economic downturn can quickly affect corporate sponsorship.

Grants: The vast majority of grant makers require your organisation to be an incorporated society. 60% of all charitable giving in NZ comes from individuals, 35% from trusts. Check annual reports of other organisations to see where their funding is coming from and the Charities Commission. If there isn't already a policy around it, have a chat with your Board re their comfort in applying for gaming grants etc.

Thank and Receipt: No matter where the \$ come from, or the amount, they all must be 'thanked' and 'receipted'.

How often should we ask for \$: Four to six times per year is a good number of times to ask. In addition to this there might be 'one-off' fundraisers that come up - special appeals - *people will let you know if they don't want to support*. Make sure you record and respect that!

Regular gifting: Here's the formula: ask/receive/receipt/report - REPEAT. Two to three times a

year ask individual donors if they would like to be willing to commit to regular gifting - suggest amounts (always give an 'other' option).

Regular donors: Give a regular gifting programme a 'name'. Make those contributing feel part of the 'inner circle'. Update them two or three times a year with what you are doing - give an example - through their regular commitment of \$ to the cause. Build up a relationship with these people. *Remember the triangle* - down the track these people can be considered as major donors/bequests. Look at *how often* people give; not *how much*. Many people are cash poor but asset rich; we are coming to a time when we will see 'baby boomer' wealth begin to be passed on; logically, this will make the 'bequest' arena much bigger in the near future. *"Relationship with the living determines generosity of the dead."*

Who is involved in fundraising: Everyone in your organisation has an effect on your fundraising - including your Board. Board-led gifting programmes are an extremely empowering tool.

More information on fundraising, check out the Fundraising Institute of NZ's website:
<https://www.finz.org.nz/>

More information on government funding: <https://www.communitymatters.govt.nz/>