



Fundraising Ideas Manual

for

Large Counties

MAJOR DONORS

Definition: For Davidson, Hamilton, Knox and Shelby counties, major donors are individuals or corporations that give \$25,000 or more in a given year.

For Madison, Montgomery, Rutherford, Sullivan, Sumner and Williamson counties, major donors are individuals or corporations that give \$10,000 or more in a given year.

Goal: The goal for the major donor effort should be 50-75% of the overall county goal.

As you are developing relationships with major donors, multi-year gifts should be asked for and encouraged to ensure long-term support and sustainability of your efforts.

Strategies for Securing Support from Major Donors

- Step 1:** Develop a list of 50-100 potential major donors by:
- Reviewing list of current supporters if applicable and assessing potential to increase their support to major donor levels.
 - Asking current supporters to identify friends and other potential contributors.
 - Asking Board members, fund development committee members, volunteers and other friends of Imagination Library to identify other potential contributors.
 - Researching potential supporters from the community.
 - Ensure ongoing communications with GBBF staff and efforts to ensure a coordinated effort.
 - A good potential major donor candidate is an organization or individual that:
 - Has a passion for the cause.
 - Has the capacity to make a gift at this level.
 - Is personally involved with and/or connected to another person that is personally involved.
 - Has personally benefited from the program (i.e. has a child who receives books).
- Step 2:** Once the list has been developed, determine key contacts and relationships with each potential major donor to establish an “in” or connection with that organization or individual and leverage relationships to secure a meeting and a gift.
- Step 3:** Using the key relationships and connections, meet with each person or program officer of the organization on an individual basis to tell them about the Imagination Library and ask them for support of the effort. As you make these requests, keep in mind the following:

- Each person making the call and making an “ask” for support should first give a gift of financial support so they can speak to their personal commitment and reasons for giving.
- If the local Imagination Library has a staff member, his or her role should be:
 - Provide creative leadership.
 - Educate and inform.
 - Inspire and set the vision.
 - Attend meetings with volunteers.
 - Identify, cultivate, follow up with and steward donors as appropriate.
 - Provide direction, tools and support to ensure volunteer, donor and Imagination Library success.
- Volunteers for the local Imagination Library should do the following:
 - Lead by example through their time and gifts of financial support.
 - Identify prospective and potential donors.
 - Provide background/additional information/insights about donors and potential donors.
 - Open doors and secure meetings as a result of their relationships.
 - Attend the meetings.
 - ASK for support and close the sale.
 - Ensure that the donor is thanked and recognized.
 - Assist with any follow up and/or trouble shooting.

Making the Solicitation Call - Agenda

- Spend time with your opening and rapport building
- Tell about your program including:
 - Current work
 - Major successes
 - Story or two to highlight
 - Future goals and objectives of the effort
- Ask for questions and ensure the flow of the conversation
- Ask for advice and feedback on your goals and plans
- Ask for a gift:
 - Ask for a specific amount
 - Tie it back to children served
 - If they can afford it, encourage families to pay for themselves and others
 - Highlight challenge or matching grants
 - Highlight recognition opportunities
- Secure commitment or determine the next steps
- Thank them and restate commitment or next steps

Step 3B: If you cannot get a meeting with the individual or company representative or if there are several individuals connected to the same person, host a reception/event/open house for major donors and potential major donors. During the meeting:

- Provide an overview of the need for the Imagination Library including statistics to clarify the need and the opportunity to help and serve. Balance need for reading and early literacy with the hope that is provided through Imagination Library by having children better prepared to enter school and read at grade level. Studies on early literacy efforts show that results often include enhanced economic contributions made by a better prepared workforce, decreased crime, and better public health.
- Talk about the goals and objectives of the program.
- Tell stories to “put a face” on the program and make it real.
- Ask for a gift in support of the effort. If they can afford it, encourage families to pay for their own children as well as others to make the program truly accessible by and available to all.
- Follow up with those who attended who made a gift and thank them for their support.
- Follow up through phone calls, e-mails and/or personal visits with those that attended who didn’t make a gift and answer questions and ask them again to consider a gift.

Step 4: Focus on relationship-building and year-round communications with each donor to clearly show him or her the results of his or her investment and encourage continued support in the years to come. Develop a calendar of contact for each individual donor. As appropriate, work to have at least monthly contact with major donors to thank them for their support and update them on the results of their investments including:

- Send a thank you note/receipt each time you receive a gift from the donor.
- Send monthly updates about plans, programs and progress for Imagination Library.
- Call at least two times in the year to personally thank them for their support and answer any questions they might have as well as provide them with updates about plans, programs and progress.
- Arrange an in-person visit at least once a year for coffee, lunch, or dinner to thank them for their past support, answer any questions they might have as well as provide them with updates about plans, programs and progress.
- Get people personally involved with the effort by asking individuals to register (or asking companies to involve their employees in registering) their own children in the program and helping to educate about and/or register others in the program. Once people are involved, they will better understand the impact and value of the program and will be more likely to support it financially.
- Encourage individuals to check with their employers to see if the company provides a matching gift for their contribution. If so, complete all necessary paperwork to secure this important gift, allowing their gifts to go twice as far.

- For companies, develop relationships and creative connections for their support to be tied to specific “results.” For example, ask hospitals to pay for the first year of the program for each child born in the hospital.
- Tell stories of children reached and touched as a result of their investment in and work of Imagination Library.

Step 5: Ensure appropriate recognition and appreciation for major donors to include:

- Listing in local publications (where appropriate and where confirmed with donor).
- Take advantage of the partnership between GBBF and Tennessee Press Association. Issue a press release about significant gifts and donations to thank the donors, promote your efforts and leverage these relationships. You can secure template press releases from GBBF to assist you in this effort.
- A special Imagination Library-specific gift such as a picture, letter from a child who is receiving books, thank you letter signed by a key community leader.
- Attendance and recognition at a special event or reception.

Individual Donors

Definition: Individuals or corporations who give less than a major donor gift (i.e. \$25,000 or \$10,000) in a given year.

2005 Goal: Establish a goal that is 10-25% of the overall goal for the county.

Where possible, ask for and encourage multi-year and/or ongoing support (i.e. bank drafts, monthly gifts, recurring credit card gifts) to build a strong and sustainable base of support.

Strategies for Securing Support from Individual Donors

Step 1: Secure a matching grant to encourage financial support.

Step 2: Identify potential donors by:

- Asking current supporters to identify friends and other potential contributors.
- Asking Board members, fund development committee members, volunteers and other friends of Imagination Library to identify other potential contributors.
- Researching potential individual and corporate supporters from the community.
- Gathering names during presentations and events and follow up with specific requests for support.

Step 3: Focus on communications pieces and messages that highlight success stories and specific requests for support. Focus on the impact of a gift of \$27. For those who can afford to do so, ask them to support their own children as well as other children to make this program truly accessible to all. Encourage individuals to check with their employers to see if the company provides a matching gift for their contribution. If so, complete all necessary paperwork to secure this important gift, allowing their gifts to go twice as far.

Step 4: Personally call individuals or corporate program officers who give a gift of \$1,000 or more to thank them for their support and answer any questions they might have about Imagination Library as well as build a relationship to ensure future involvement and support.

Sample Thank You Message:

Hello, my name is NAME, and I'm calling on behalf of Imagination Library to thank you for your recent generous contribution of \$____. We couldn't do this work without you, and are grateful for your support. Please know that children throughout _____ County will receive an age-appropriate and meaningful book each and every month as a result of your investment. Just think of the joy that will fill each house each month as this "gift" arrives. You make this possible. If you ever have any questions about Imagination Library, your gift or the impact it will make on the lives and futures of these children, please contact NAME at PHONE NUMBER. Thank you again for your support.

- Step 5: Ensure that all donors receive thank you notes and receipts for their gifts. Include a return envelope and response device for future gifts.
- Step 6: Use communications pieces such as brochures and website to educate and inform on a regular basis. Include stories of lives touched and children reached through the local county effort to make this "real" and to put a "face" on the effort.
- Step 7: Determine if specific individual donors have the capacity to and interest in becoming major donors. If so, cultivate the relationship accordingly.

Foundations

Definition: Established corporate or family foundations that have stated giving guidelines and processes.

2005 Goal: Establish a goal that is 10-20% of the overall goal for the county.

Strategies for Securing Support from Foundations

- Step 1: Research potential foundations to determine areas of focus and support that are in line with Imagination Library. Develop a list of 20-30 potential foundation supporters by conducting research using:
- Grantseekers Guide to Funding, available through Center for Nonprofit Management at www.cnm.org, provides an overview of foundations, corporations and family foundations that provide funding to organizations in Tennessee.
 - Foundation directory websites such as: www.fdncenter.org, www.fconline.fdncenter.org or www.foundations.org.
 - Local county publications and business newspapers.
 - Internet research through foundation websites and www.guidestar.com to secure summary information about the foundation as well as their recent 990s that provide details about their giving histories, processes, amounts, etc.
 - Asking current foundation supporters to identify others who might be interested in and willing to support your effort.
- Step 2: Develop relationships with foundation program officers to increase likelihood of being funded. Develop a calendar of contact for each foundation and potential foundation supporter to cultivate and build this relationship including:
- Know all foundation goals, timeframes and deadlines.
 - Work to identify a connection or contact with the foundation (i.e. Board member knows them) and pursue this contact to develop a relationship.
 - Try to secure a face-to-face meeting (or at least a phone call) with the foundation program officer prior to submitting the grant proposal to answer any questions, cast the vision and put a “face” on your Imagination Library and the proposal.
- Step 3: Prepare and submit a grant proposal after establishing the relationship. Ensure that the proposal:
- Meets all foundation guidelines and formats for focuses, layout, information included, etc.
 - Ensure that the foundation focuses are a fit for the Imagination Library.
 - Ask for a gift at the high end of the grant range unless otherwise recommended by the program officer.

- Ensure that you understand all foundation reporting and follow up requirements.
- Ensure that you make a connection between the investment by the foundation and the lives/children touched and reach.
- Use SMART goals in your proposal including:
 - ❖ **S**pecific
 - ❖ **M**easurable
 - ❖ **A**ttainable
 - ❖ **R**elevant
 - ❖ **T**ime Specific

Step 4: Submit at least three grant proposals to potential foundation supporters that are well-researched and with whom you have developed relationships so they are not “cold calls.”

Step 5: Ensure all foundation reporting requirements are met to secure ongoing support and alignment with foundation expectations to increase chances of ongoing support.

Take Advantage of Support Available from Others

- Take advantage of the partnership with the Tennessee Press Association (TPA), a trade organization of the vast majority of Tennessee's daily and non-daily newspapers and the parent organization of Tennessee Press Service and Tennessee Press Association Foundation. TPA has partnered with GBBF to increase public awareness of and participation in its statewide implementation of the Imagination Library. This partnership will benefit local counties by:
 - 📖 Providing print media coverage and support of local Imagination Library efforts, initiatives, fund raising campaigns, etc.
 - 📖 Encouraging editorial support of local efforts.
 - 📖 Providing placement of local county program ads, contest announcements and fundraising pledge card ads made available for downloading from the TPA website, www.tnpress.com.
 - 📖 Call the TPA toll free: 1-800-565-7377.

- Tennessee Technological University, consistently ranked among the Top Public Universities in the South, is assisting the Books from Birth effort through its Business Media Center where leaders developed www.governorsfoundation.org and other innovations to promote the effort and to provide valuable tools, information and resources for each county's Imagination Library initiative. Consider working with your local colleges to create support materials or a website for your county's Imagination Library program.

- Active supporters are vital to the success of the Imagination Library. The following groups and organizations support the state-wide program and can be sources of volunteers for registering children, promotional endeavors and fund raising activities:
 - 📖 County School Directors – Department of Education Commissioner Lana Seivers has expressed to these leaders the importance of their involvement.
 - 📖 Head Start Program Directors
 - 📖 Tennessee Board of Regents Schools
 - 📖 P-16 Councils/Local Education Foundations
 - 📖 UT Extension Services
 - 📖 Local Utilities and Power Companies
 - 📖 Tennessee Business Roundtable
 - 📖 Tennessee Chamber of Commerce
 - 📖 Tennessee Hospital Association and Hospital Alliance of Tennessee - THA and HAT are encouraging the state's maternity and children's hospitals to register newborns and other children on site. Some hospitals have agreed to donate an amount for each child born there. Others have allowed for a donor card to accompany Imagination Library signup brochures.
 - 📖 Community Action Agencies
 - 📖 County Mayors Association
 - 📖 County Technical Assistance Service

- 📖 Estate Planners and Funeral Homes. They may be willing to display donor cards.
 - 📖 Friends of the Library
 - 📖 Girl Scouts of Tennessee – Statewide CEOs agree that registering children for the program will be an excellent project for the Girl Scout Troops.
 - 📖 Human Resource Agencies – HRAs are providing information and technical support to the counties in their service areas.
 - 📖 Rotary Clubs
 - 📖 Tennessee County Services Association
 - 📖 Tennessee Municipal League
 - 📖 Tennessee Primary Care Association
 - 📖 United Way and the child literacy agencies it supports
 - 📖 Other civic clubs such as Kiwanis Club and Lions Club

- Take advantage of partnerships established by GBBF through which organizations and associations are offering a range of support and services. This is an evolving and growing list. Please visit the GBBF website (www.governorsfoundation.org) and read GBBF Signposts newsletters for regular updates and details about these partners.

- Work with local companies such as UPS, Wal-Mart, and Kroger that provide financial, volunteer and/or promotional support to local, community-based initiatives if you develop a relationship with the local contacts. Discuss adding the Imagination Library to these companies' charitable payroll deduction options.

- Get comments and quotes of support from local community leaders and/or local "celebrities" to draw attention to the effort.

- Recruit a fund development committee of 3-5 individuals to assist with the fund raising efforts and requests for support; provide all necessary training, resources and support. Committee members should:
 - 📖 Make personal gifts in support of the Imagination Library effort.
 - 📖 Identify potential donors to and supporters of the effort.
 - 📖 Make solicitation calls on donors and potential donors to educate them about Imagination Library and ask for their support.
 - 📖 Invite friends to key events and functions (i.e. kickoff, galas, fund raising efforts) for Imagination Library.
 - 📖 Serve as spokespersons for Imagination Library.

- Develop comprehensive tracking systems to fully track and assess contributions as well as progress towards segment and overall goals. Utilize this system to track and ensure follow up and ongoing relationship building efforts.

- Maintain ongoing communications with GBBF to ensure support of each other's efforts and avoid duplication of efforts.

- Utilize support from GBBF:
 - 📖 GBBF staff will attend visits and calls on your major donors as needed and requested.
 - 📖 GBBF staff will help you develop and determine ask amounts and key messages for any calls and visits you might make on key potential donors.
 - 📖 Key messages and sample talking points.
 - 📖 Materials such as brochures, videos, books, Signpost newsletter, GBBF presentation materials, website and PowerPoint presentation.
 - 📖 Staff leadership to troubleshoot and assist.
 - 📖 Training opportunities.
 - 📖 Website and chat rooms for exchange of ideas.

Don't hesitate to call GBBF staff toll-free at (866) 368-6371 if we can assist in your planning and implementation efforts.

Appendix - Ways to Blow the Ask

- Don't tailor the ask for financial support to the individual or company.
- Don't sufficiently prepare the prospect for the ask.
- Pick an unsuitable setting for the ask meeting.
- Exclude important people from the meeting (i.e. staff, spouse).
- Wing it during the meeting.
- Stick to your agenda at all costs.
- Don't listen.
- Promise more than you can deliver.
- Waffle when making the ask.
- Pressure the donor for a quick response.
- Announce the gift prematurely.