



Dear colleagues,

Happy 2020! I hope you all have started your year off well. As we launch into a new decade, take this opportunity to reflect on the successes of 2019 and determine areas where your Affiliate could improve. I always recommend allocating time to conduct a thoughtful SWOT analysis where you will assess your Strengths, Weaknesses, Opportunities, and Threats. What areas are your Affiliate doing well in and how can you maximize growth? Where should you focus more of your energy? Perhaps it's your donor base or board membership. Taking the time to carefully consider such questions will help you plan for the future and identify achievable benchmarks.

- Dennis G. Serrette  
Senior Vice President, Partnerships and Advancement



### *Tips to Consider for 2020!*

As a new decade begins, here are some best practices for you to reference. As much as fundraising involves strategy, it's a mindset and a team effort, too. Every person within your Affiliate has a role to play in raising funds.

#### **1. Bridge a connection between your annual fund program and your gift planning processes**

Engaging your donor base is key for securing significant funds, and the path to planned gifts is paved with annual fund donors. Start by frequently inventorying your donors so you can identify an opportunity for a conversation about a planned gift. Data shows a little over 5% of donors have made a planned gift, but 33% said that they would consider if they were asked. Moreover, 70% of those making a planned gift did so because they were asked.

#### **2. Let the data guide your strategy**

Donors will illuminate their philanthropic priorities through their action and involvement. You are likely not the target, so, let your audience's response drive your strategy.

#### **3. Constantly gather stories by interviewing and spending time with your clients**

Make it a routine to sit down with the individuals who your Affiliate serves and showcase their stories in your appeals, newsletters, and thank yous. No one can describe the life-changing impact that your Affiliate has provided better than the person who actually benefitted from the programs and opportunities offered.

#### **4. Spring clean your donor base**

It's essential to keep up to speed on your donors' information. It's very easy to upset a loyal donor with incorrect information, such as their personal details, gift amount or gift history. Prioritizing a clean donor base will show that you are paying attention to your donors, which will help you maintain a positive, longstanding relationship.

#### **5. Embrace Social Media**

Instagram, Twitter, and Facebook continue to have a significant impact society. 500 million+ Instagram accounts are using Stories every day. Take advantage of this content type or you may miss the opportunity to showcase your Affiliate to engaged and interesting supporters and from different generations, too.

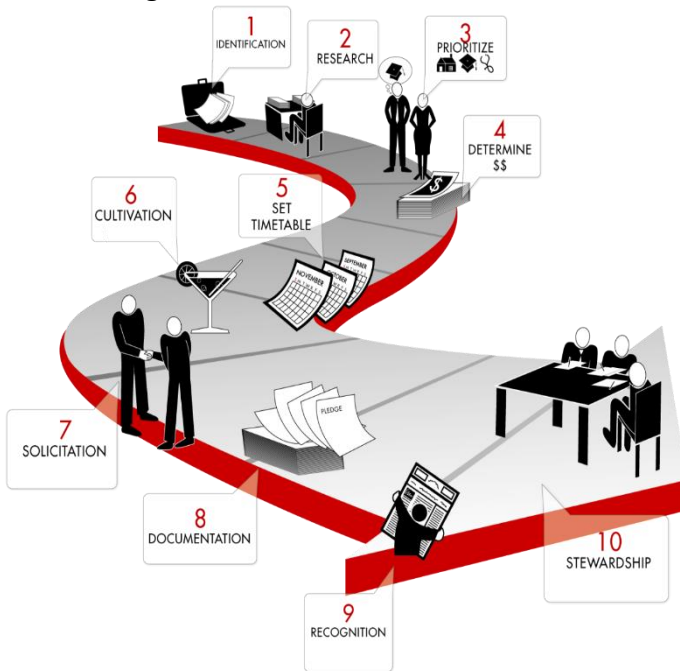
#### **6. Reduce your anxiety of over-soliciting**

If you aren't actively engaging your donors by inviting them to increase their support to your Affiliate, another charity will be. If a donor isn't able to give at the moment, still send them an appeal letter to provide them with updates and remind them that you are there for when they perhaps have the capacity to give again.



## Moves Management

The solicitation process is more than just the Ask. It is a 10-step process that requires thoughtful preparation and implementation. In fact, 90% of the work goes into preparation while only 10% of the process is the actual Ask. Look at the following steps and see what areas might be missing in your fundraising tactics.



### Researching Prospective Donors

Determine if someone is a “viable” prospect by determining their AFFINITY (interest) and CAPACITY (monetary ability). Then...

Look for the following pieces of information:

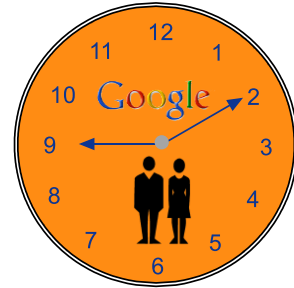
- Giving history
- Family
- Education
- Business affiliations
- Wealth
- Philanthropic interests

*“Research is formalized curiosity. It is poking and prying with a purpose.”*

– Zora Neale Hurston

## The 10-Minute Search

Researching your prospects doesn’t have to take days. After identifying your potential donors, allocate 10 minutes to do an initial search. Here are some useful resources:



- **Marketwatch.com** for stock information
- **Google.com** for Affiliates
- **Hoovers.com** for business information
- **Guidestar.org** for a charitable giving entity
- **Opensecrets.org** for political donations
- **Google News** for articles

## Resources

Visit the [Project Rock website](#) for more information about Moves Management and join our [next Webinar](#) on Thursday, March 5<sup>th</sup> at noon!



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Fundraising  
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27 Courses



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100+ Callers



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Newsletter

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16 Alumni  
Affiliates