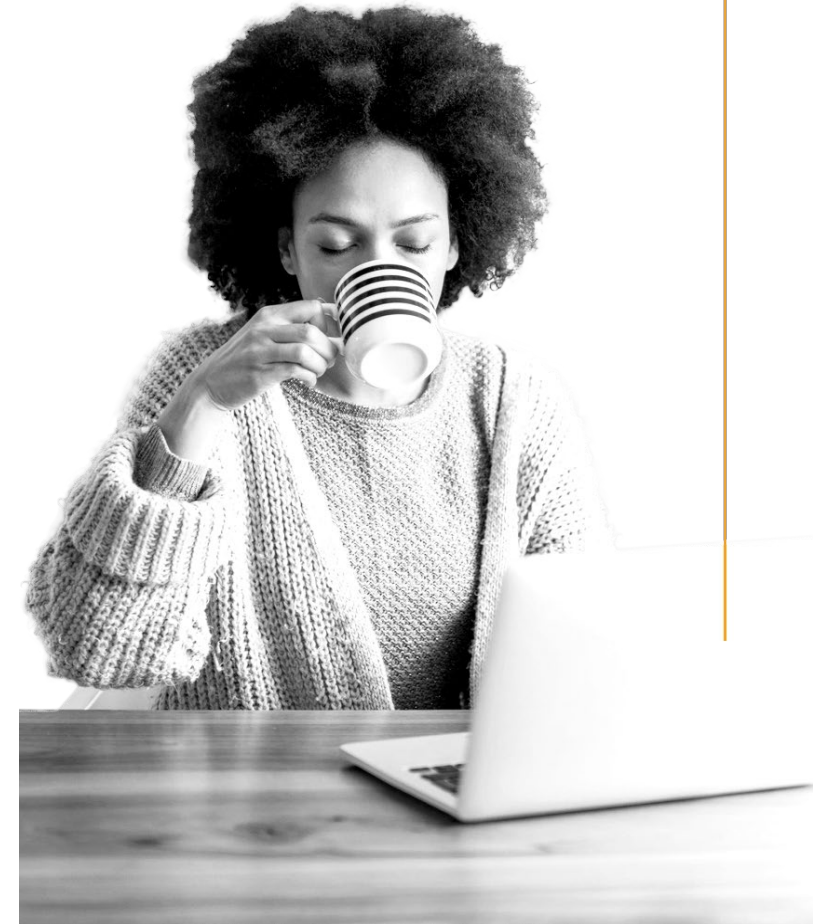


Welcome

We'll be getting started momentarily.

In the meantime, please share in the chat where you are joining from today!

Get comfortable
and ready to learn!



Introduction to individual giving

April 21, 2022

Yes, we are recording today's presentation.

You will receive a link to the recording via email in the next 48 hours.



Presenters



Dave Holmes

Network Engagement Manager
he/him/his



Krista Berry Ortega

Network Engagement Manager
she/her/hers

Candid.

What we do

Every year, millions of nonprofits spend trillions of dollars around the world. Candid finds out where that money comes from, where it goes, and why it matters. Through research, collaboration, and training, Candid connects people who want to change the world to the resources they need to do it.

Thank you!

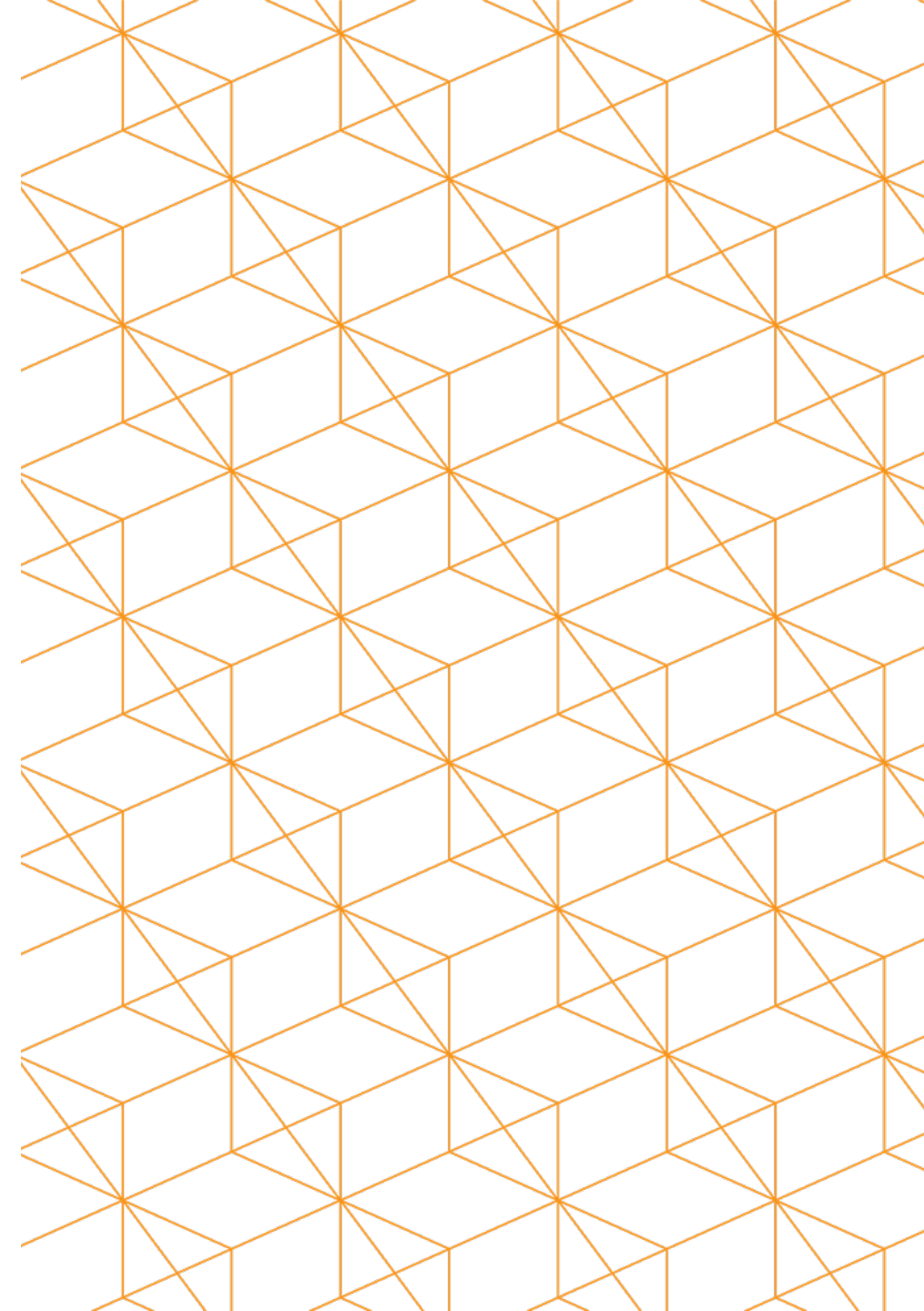
Thanks to San Manuel Band of Mission Indians!

This training is brought to you by...



Candid.

Grounding moment



Upon completion of this training, you should be able to:

- Explain the importance of individual giving in a nonprofit's fundraising strategy
- Identify key steps for a successful individual giving program
- Draft a plan to start or improve your annual individual giving program

Let's start with a few definitions...

Fundraising program: An organization or institution's strategy, tactics, objectives, case, and needs in their entirety; a campaign that is loosely defined in terms of time frame and specific funding opportunities; a campaign; a timetable for a campaign.

Annual giving: Annually repeating gift programs; seeking funds on annual or recurring basis from the same constituency; income is generally used for operating budget support.

Campaign: An organized effort to raise funds for a nonprofit organization.

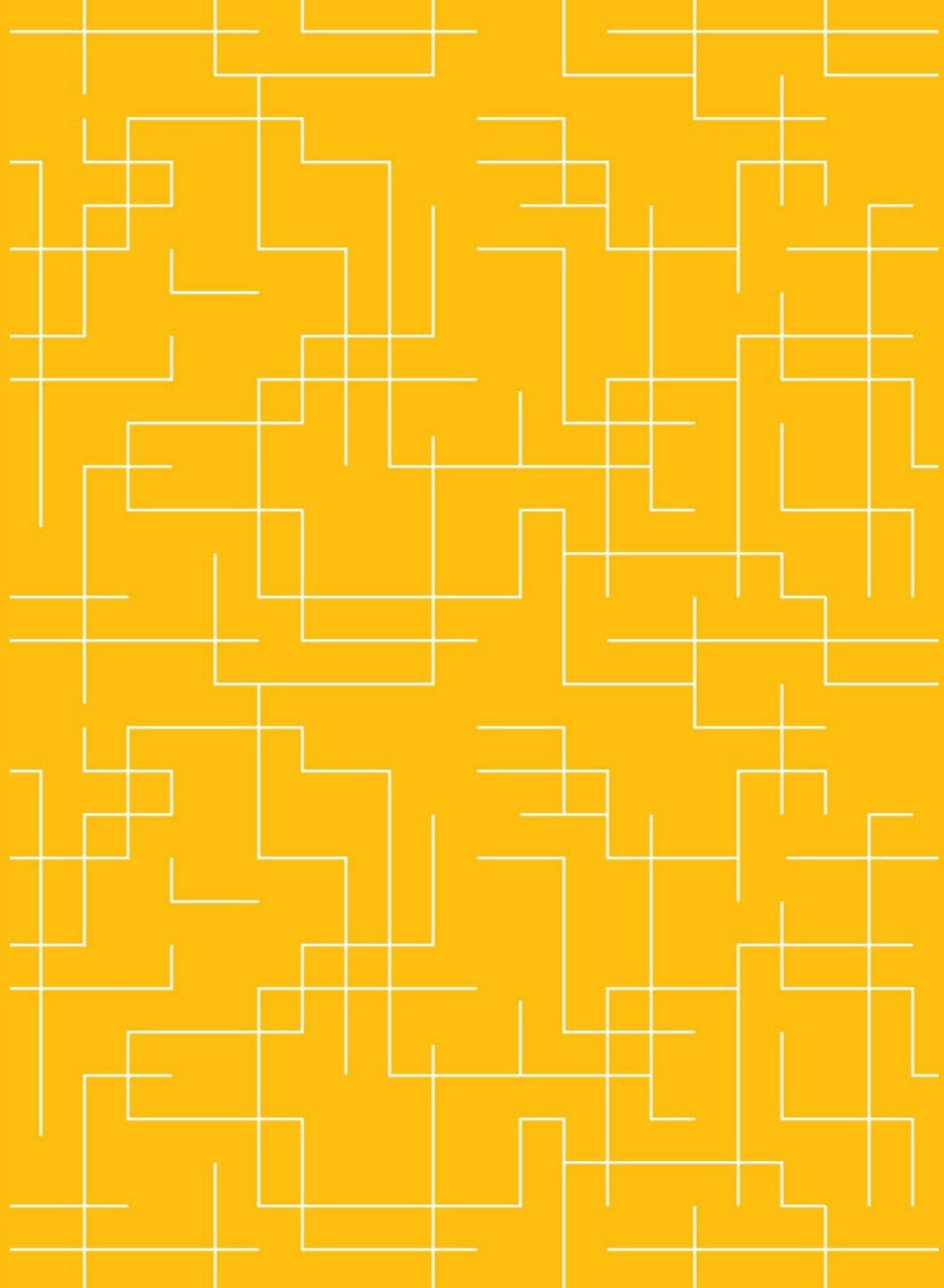
Major gifts: A gift of significant amount (size of gift may vary according to organization's needs and goals); may be repeated periodically. Also a program designation.

Source: Glossary of Fundraising Terms <https://www.cfre.org/wp-content/uploads/2018/10/Handout-Glossary-of-Fundraising-Terms.pdf>

Poll

Do you currently have an individual giving program?

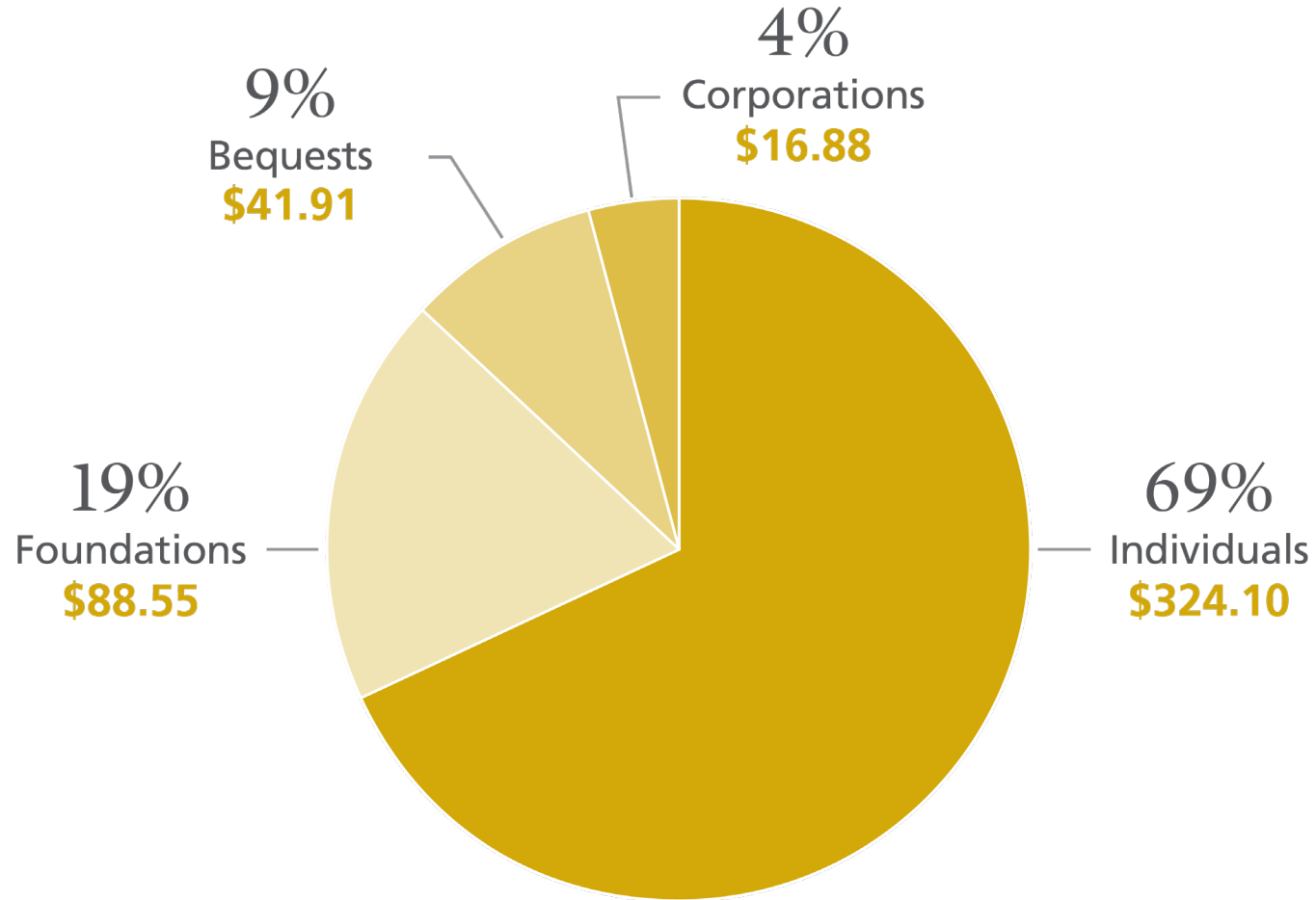
- Yes, we're updating it
- Yes, we're in the process of creating it
- No
- Not sure



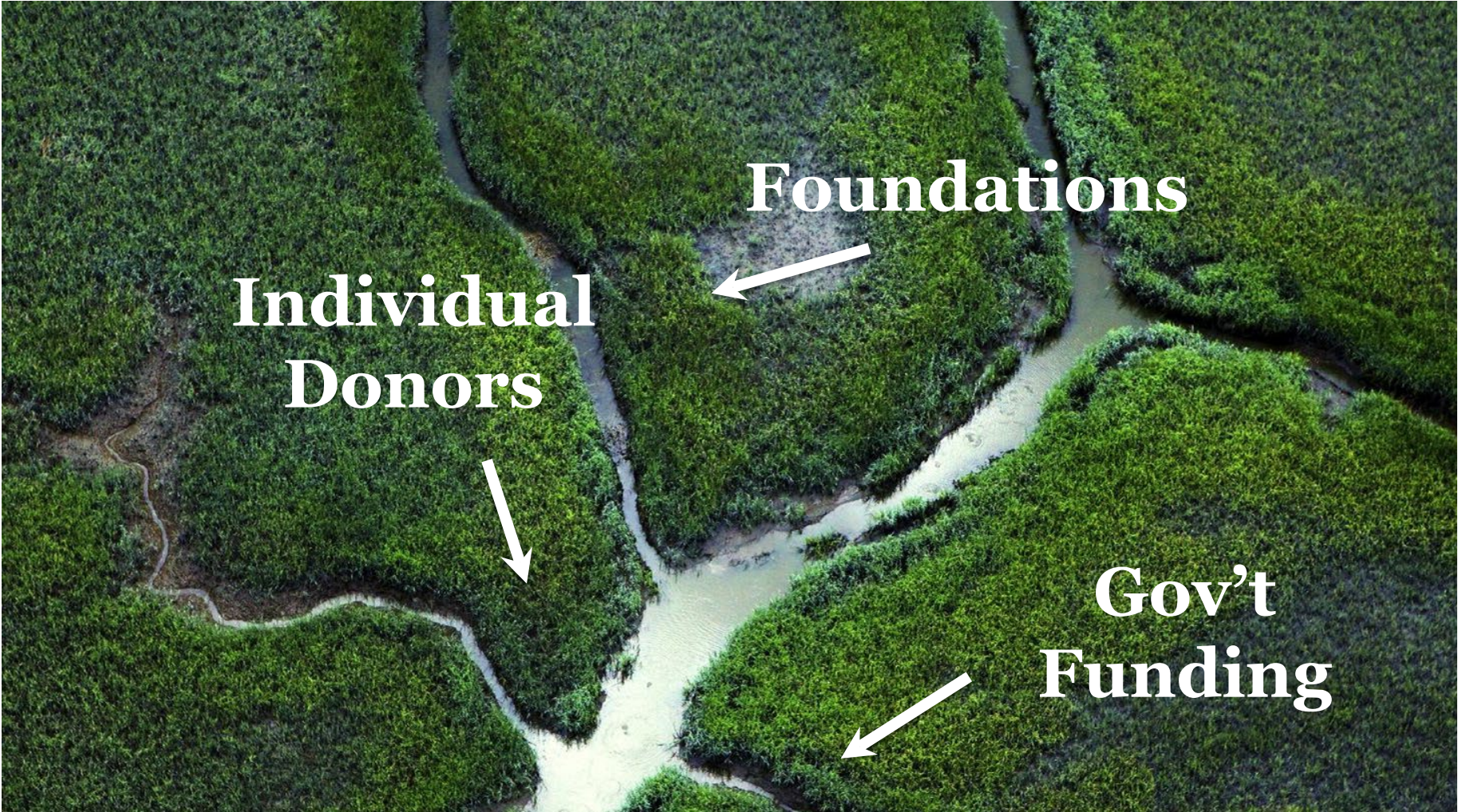


2020 contributions: \$471.44 billion by source of contributions

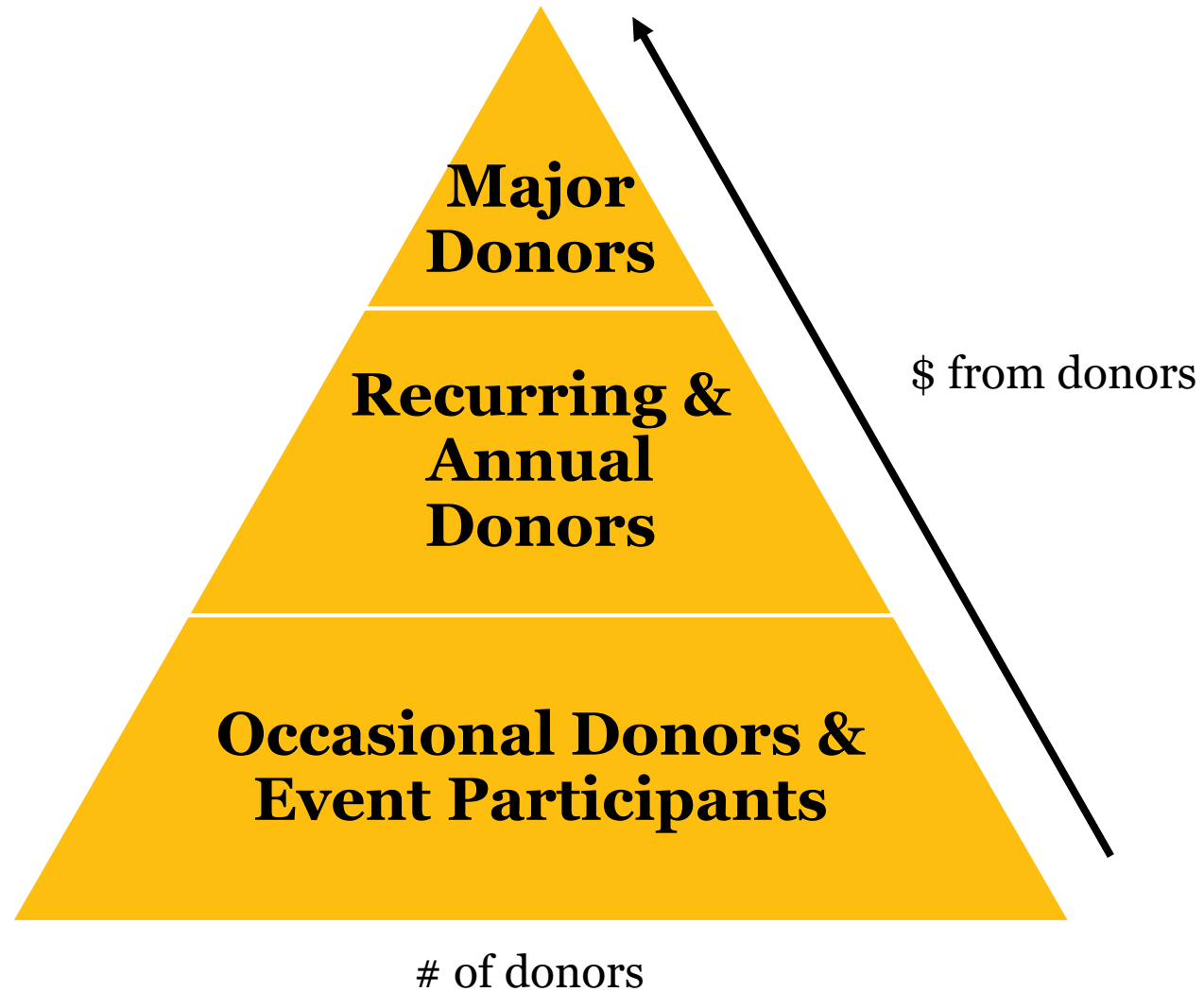
(in billions of dollars - all figures are rounded)



Create stability through diversifying funding



The Donor Pyramid



Why do people give
to nonprofits?



The number one reason a donor decides to give to a nonprofit is...

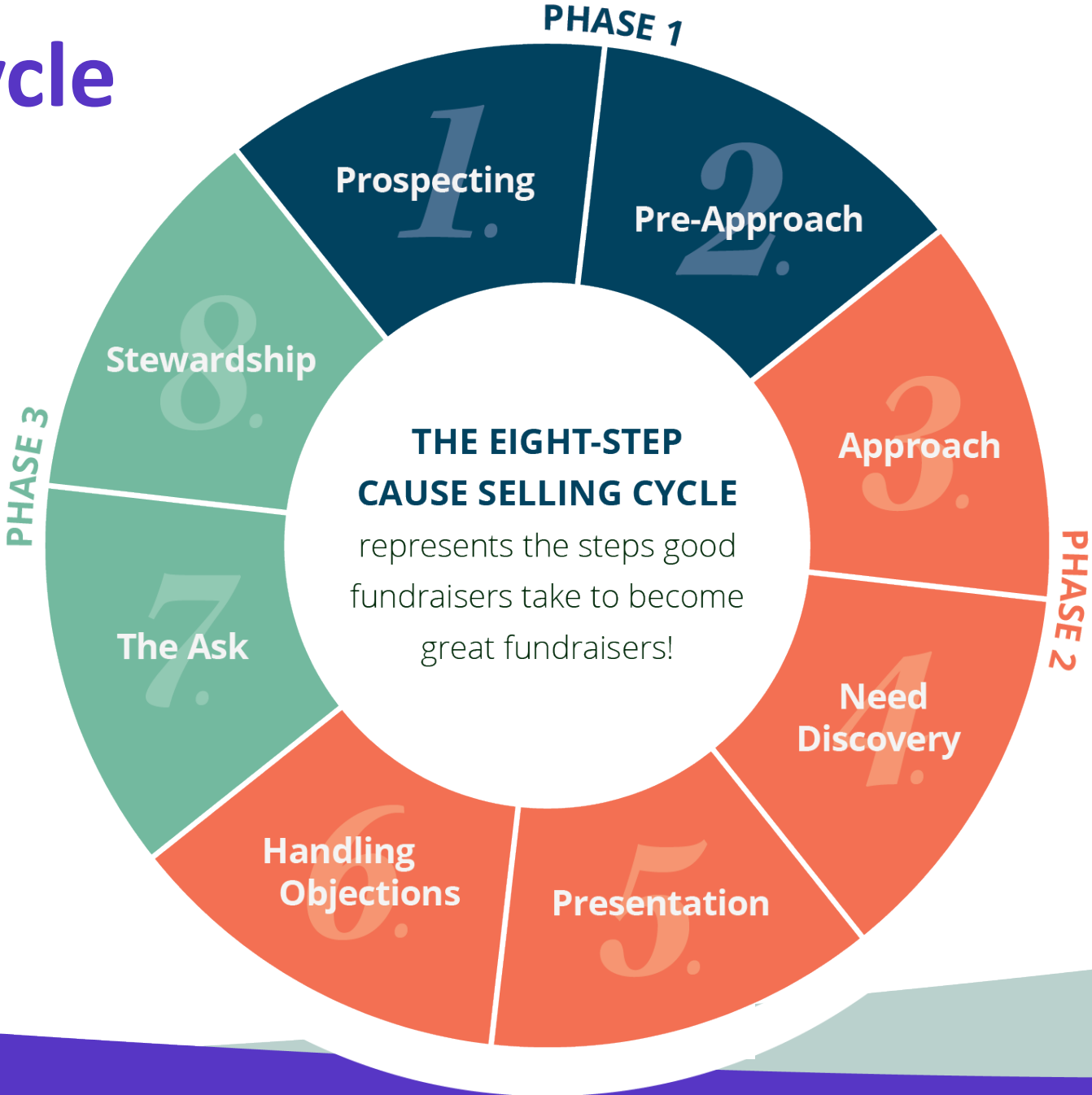
THEY WERE ASKED.

(BY A FUNDRAISER)

The Solution: Cause Selling



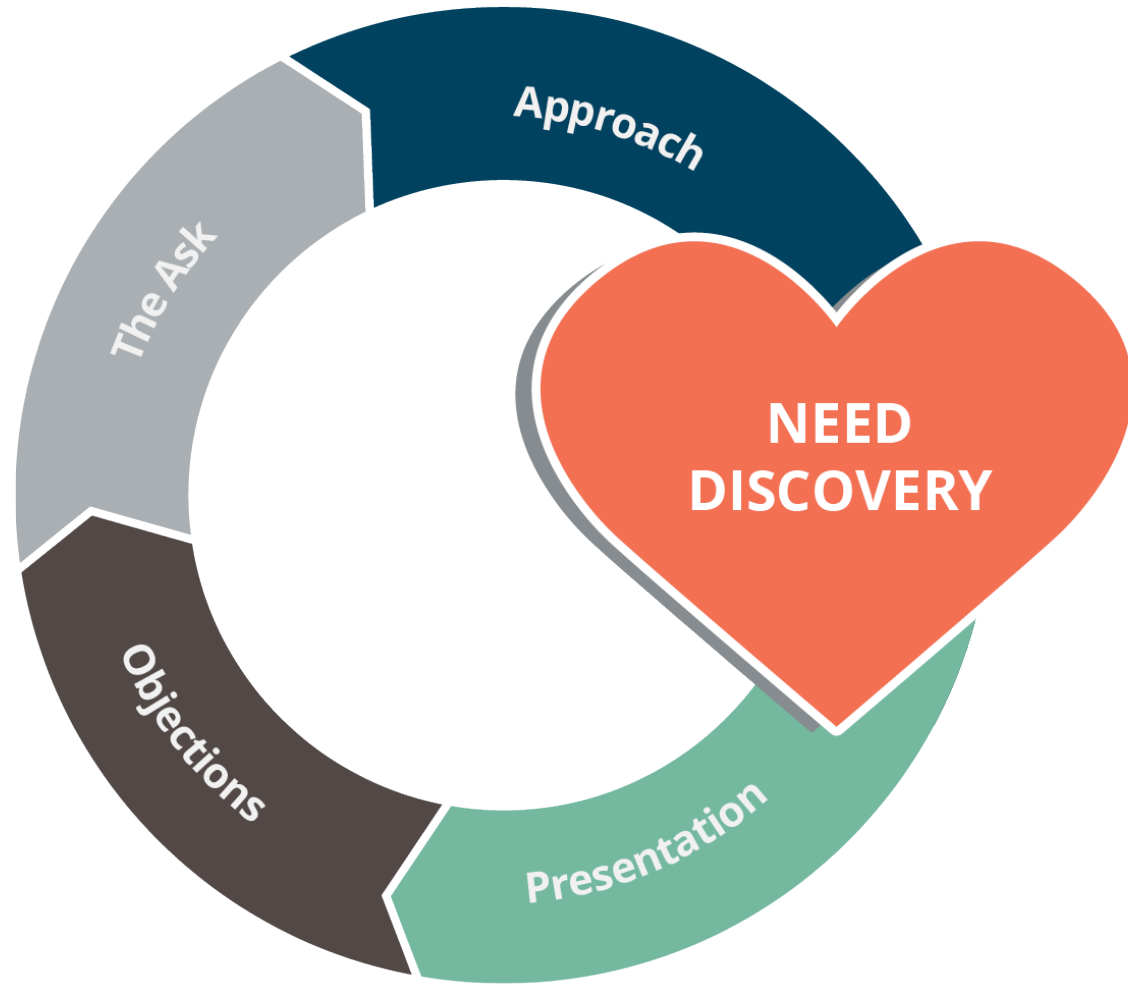
The Cause Selling Cycle



Key steps for an individual giving program



1. Find the donor's name (prospecting)
2. Gather the information you need (pre-approach)
3. Introduce themselves to the donor (approach)
4. Discover donor's unique passions (need discovery)
5. Tell the story of the mission (presentation)
6. Overcome potential roadblocks to giving (objections)
7. Ask for a gift (ask)
8. Follow up with results to foster loyalty (stewardship)



The Cause Selling Cycle won't work without its heart.

You don't ask your way to a gift; you listen your way to a gift.

What is a fundraising plan?

A living document which lays out specific fundraising tasks and strategies, including who will be responsible for completing them and the timeframe of when they need to be accomplished.



Sample Plan Strategy

Goal: Raise \$10,000 from new and occasional donors by June 30

Strategy: Launch a virtual fundraising campaign

Action steps:

- Development staff will research potential prospects and design virtual campaign. **Timeline: March - April**
- Board and staff will review prospects to see if any connections.
Timeline: April
- Development staff will review and update Candid Profile. **Timeline: April**
- Development staff will launch virtual campaign to engage and solicit prospects. **Timeline: May – June**

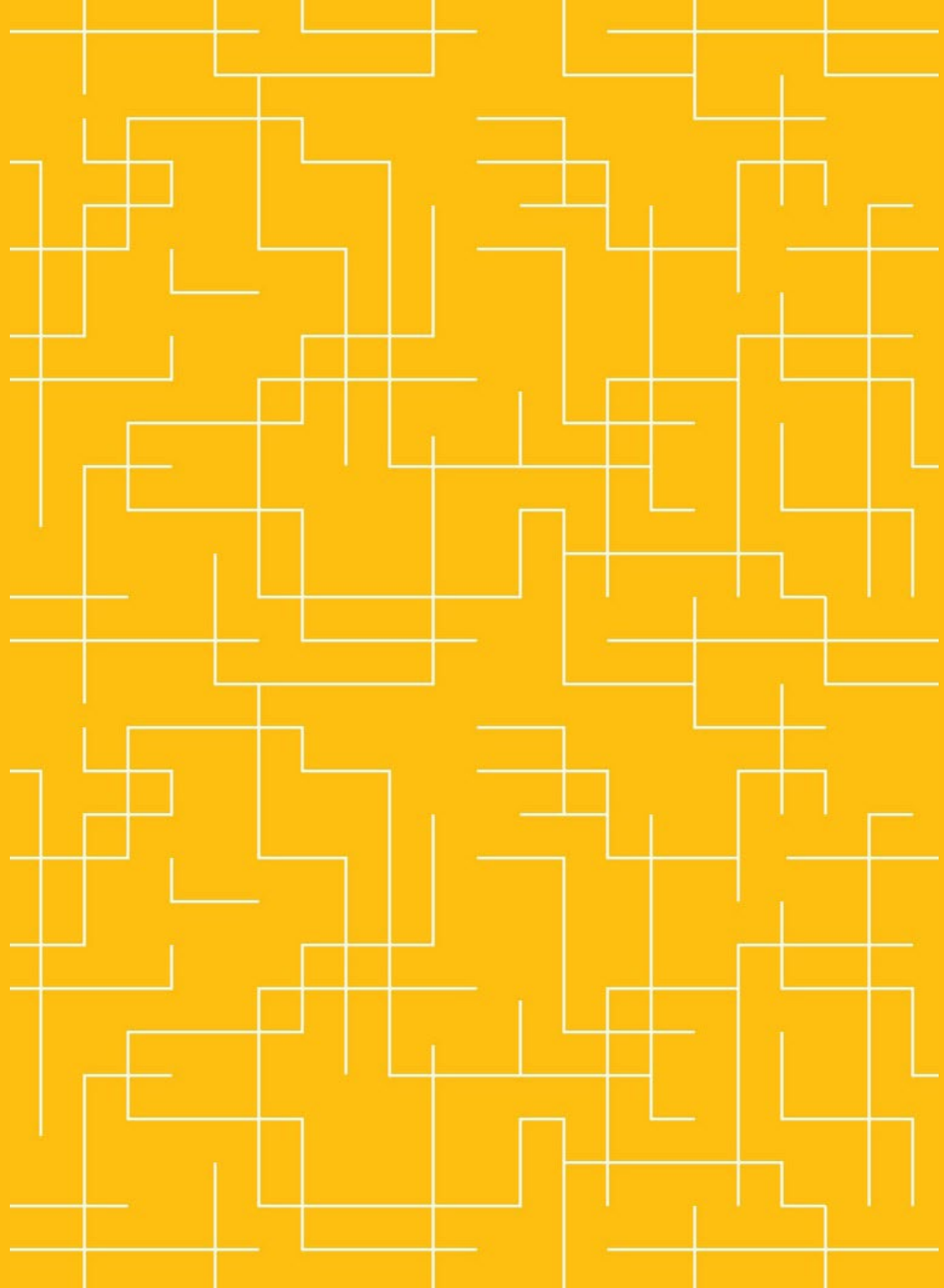
Your turn!

**Use the handout to
draft a sample strategy
for your org this year.**



Pop quiz #1

How many active nonprofits are there in the United States?



Candid Profiles

- Go beyond IRS data
- Insights on millions of nonprofits
- Information from nonprofits themselves, 990s, and other 3rd party sources

The image shows a screenshot of the Candid website profile for Exceptional Minds. The profile is titled 'EXCEPTIONAL MINDS' and is categorized as an 'EDUCATIONAL INSTITUTIONS'. The profile includes a mission statement, top funding sources, and various organizational details. A large orange lightning bolt graphic is overlaid on the right side of the profile.

EXCEPTIONAL MINDS
EIN: 80-0910843

IRS Pub 78 Verified as of August 2019
IRS BMF 990a(9) as of August 12, 2019

View Summary
Charity Check Report
Add to Watch List

SUMMARY | PROGRAMS | FINANCIALS | OPERATIONS

Mission
Maximize the talents of artists on the autism spectrum with customized instruction and hands-on experience to prepare them for gainful work in digital arts and animation.

Top Funding Sources
The graph shows the organization's top funding sources and the grant amounts received from each.

Program Service
\$1,662,083.25

Contributions & Grants (Includes in-kind donations)
\$903,571.89

Other Revenue
\$45,911.54

Board Chair
David Shadenkov

Vice Chair
Ms. Yudi Bennett

Main Address
13400 Riverside Drive Suite 211
Sherman Oaks, CA 91423
USA

Show More Contacts

Keywords
Autism Spectrum, vocational school, Animator, visual effects

Rule Year
2009

EIN
80-0910843

Jobs
Number
5999375481

Cause Area (NTEE Code)
Specialized Education Institutions/Schools for Visually or Hearing Impaired; Learning Disabled (B28)

Other Youth Development
N.E.C. (D99)

Scholarships, Student Financial Aid, Awards (B82)

Show More Contacts

Keywords
Autism Spectrum, vocational school, Animator, visual effects

NAICS Code
611699 All Other Miscellaneous Schools and Instruction

IRS Subsection
501(c)(3) Public Charity

IRS Filing Requirement
This organization is required to file an IRS Form 990 or 990-EZ.

Download Tax Forms
Show Forms 990

Social Media
Facebook, Twitter, LinkedIn, YouTube, Instagram

The Seals of Transparency



Provide basic information to **make sure donors find you**



Share program(s) information and brand details to **guide funding decisions**



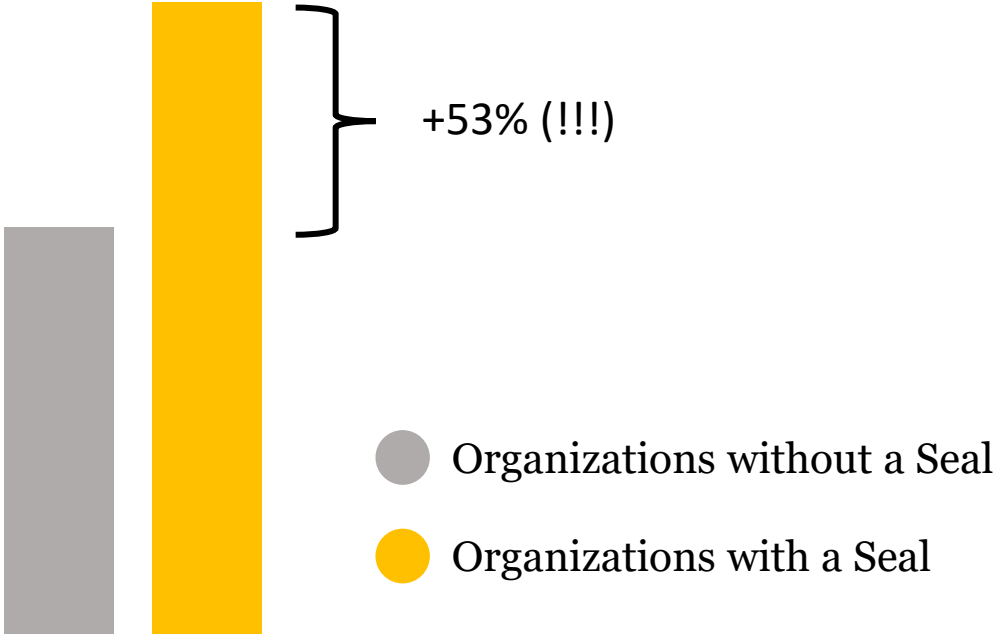
Upload your financial details, board chair name, and leadership demographics to **gain trust and support**



Share your strategic plan, progress, and results to **highlight your impact and boost your funding**

It turns out that transparency pays off

Year over year contributions to nonprofits



Source: Villanova University research published in accounting journal, linking earning a GuideStar Seal of Transparency to more contributions. Learn more at learn.guidestar.org/transparency

3 easy steps to claim and update



Have questions? Go to our Help Center

- Go to **help.guidestar.org** for
 - Guides on how to claim your profile
 - Guides for how to earn a Seal

Questions?

What's next?

Introduction to Fundraising Planning

May 12 and May 19

10 – 11:30am PT

<https://www.eventbrite.com/e/269155530437>

How did we do?

Your feedback is important to us! Please take a moment to fill out our course survey:

<https://forms.office.com/r/vk8DoavvBu>

Thank you

Stay connected and never miss a virtual training by subscribing to our Candid Learning newsletter
bit.ly/CandidLearningNewsletter

