

THE OTTAWA HOSPITAL

FOUNDATION

## *A Snare Isn't Only a Drum!*

Fundraising 101 – The Primer

Barry Bloom, Director Annual Fund – The Ottawa Hospital  
Foundation

Jack Silverstein, Director United Jewish Appeal and Ottawa  
Jewish Community Foundation

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*Direct Mail, Monthly Giving  
and Giving Circles*

Barry Bloom, Director Annual Fund – The Ottawa Hospital  
Foundation

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## *Direct Mail Tips*



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## *Get yourself educated*

Collect other organizations direct mail

- Collect prospect appeals that you see over and over
- Subscribe to Mal Warwick's Newsletter
- Read Mal Warwick's books
- Read Jerry Huntzinger's book – if you can find it
- Talk to fundraiser's with direct mail programs – **find a mentor**

*Know who your direct mail donor*

- Women
- In their 60's
- Religious
- Have high disposable income (but not high income)
- Like to read
- Like to give in the privacy of their own home
- Support several organizations

*Mail four times a year to your donors – mail frequently*

- Donors give by the calendar
- Conversion rate
- Renewal rate
- Renewal appeals
- Special appeals
- Urgent appeals
- Premiums

## *Create a copy platform*

- Problem – ask the donor to resolve a problem
- Solution – actions to fix the problem
- Credibility – why is your organization unique to solve the problem
- Ask – the offer, how the money will be used

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*Tell a compelling story that will inspire your donors*

- Emotion sells more than logic
- Use “you” a lot
- Make the story personal
- Make the story sound like it one person talking to another
- You have 5-10 seconds to catch the readers imagination
- Longer letters work
- Include a P.S.



*Nine point checklist*

- AIDA – Attention, Interest, Desire and Action
- Use Saxon words and not Latin words – they're shorter
- Use vivid words and not hackneyed ones
- Use shorter sentences and vary the length
- Use short paragraphs and vary the length
- Use active verbs not passive
- Use buckets and chains to link your paragraphs
- Relate the story to the reader wherever possible
- Does it sound like someone is talking?

## *The envelope*

- Your appeal starts with the envelope
- For the envelope use a live stamp and handwritten address

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*Direct mail is measurable – take advantage of it*

- Make projections at the beginning of the year
- Measure performance against projections
- Pieces out
- Gifts in
- Response rate
- Average gift
- Cost
- Cost per piece
- Net

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*Monthly Giving*

## *Monthly Giving*

- Promote in letters
- Promote on reply coupons
- Promote with tax receipts
- Get volunteers on the phone
- What are the benefits to the donors?
- Upgrade

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## *Giving Circles*



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## *Giving Circles or Giving Clubs*

- When do you create a giving circle?
- Be strategic
- What is your purpose?
- Brand your club
- Separate a group of donors
- Steward your donors – white gloves treatment
- Allows you to get to know them
- Move on to bigger things

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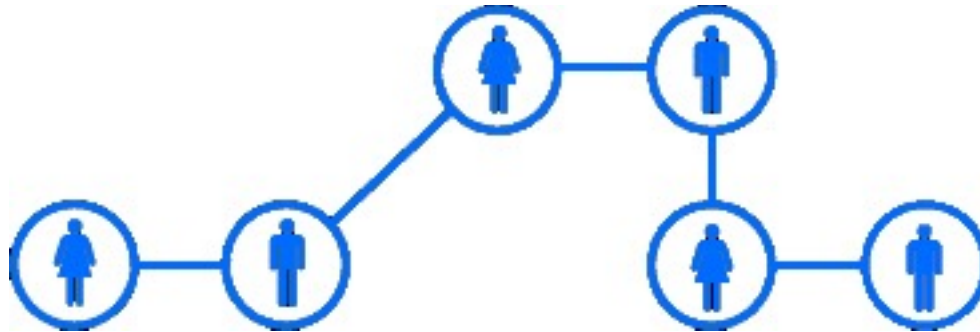
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## *Major Gifts*

Jack Silverstein, Director United Jewish Appeal and Ottawa  
Jewish Community Foundation



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- Donors
- People who share your belief in the cause/mission/vision
- Expert Witnesses

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- Job descriptions
- Goals vs. Expectations
- What is the purpose of volunteers?
  - Policy
  - Fundraising
  - To open doors
- Form a FRC

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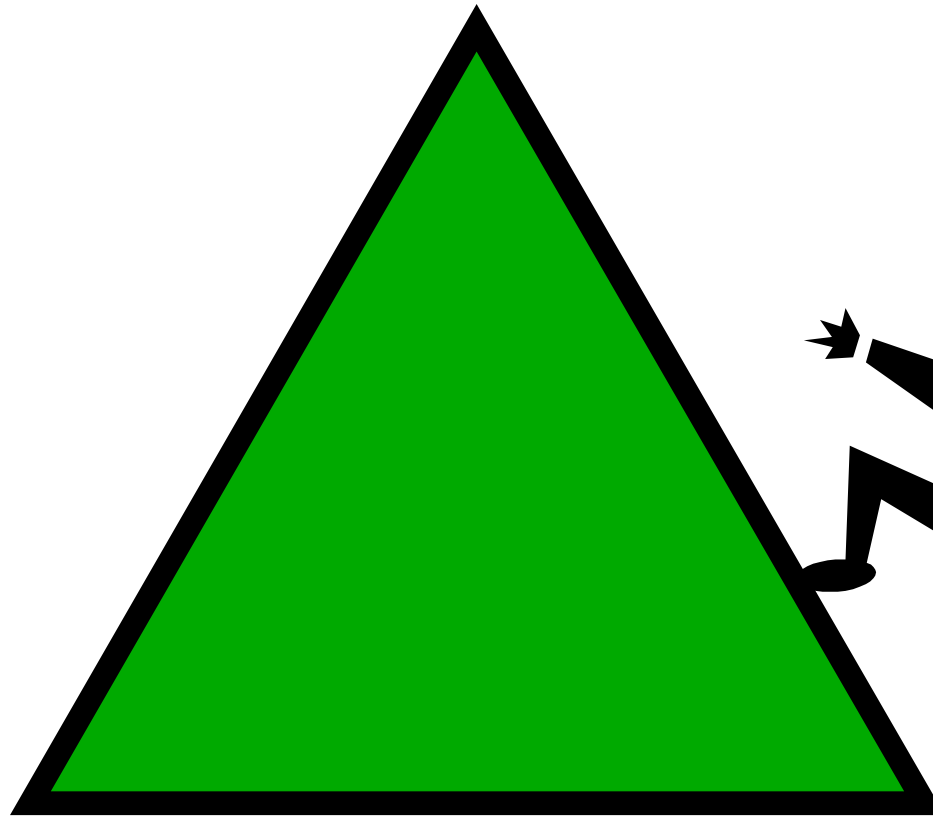
When to Fundraise for MG

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Leadership

Prospects

Case



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- Everything in life is a decision – benefits must outweigh costs
- URGENCY – if it can wait, it probably will
- Impact – must be greater than the “here & now”
- Not only limited to campaign – there should be a case for ANY MG
- Content – too much/ too little

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- People must believe in the leadership / vision/ mission and charitable activities
- Campaign must be a TOP PRIORITY for leadership (professional & lay leaders)
- Building community vs. getting the money
- Leaders must donate

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**C**ommitment

**C**apacity

**C**ontact

**C**haritable

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## The “RIGHT”s

- The **right** person asks
- the **right** person for
- the **right** amount of money
- in the **right** way
- at the **right** time
- for the **right** reason

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*Stewardship*



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Stewardship

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*What is stewardship?*



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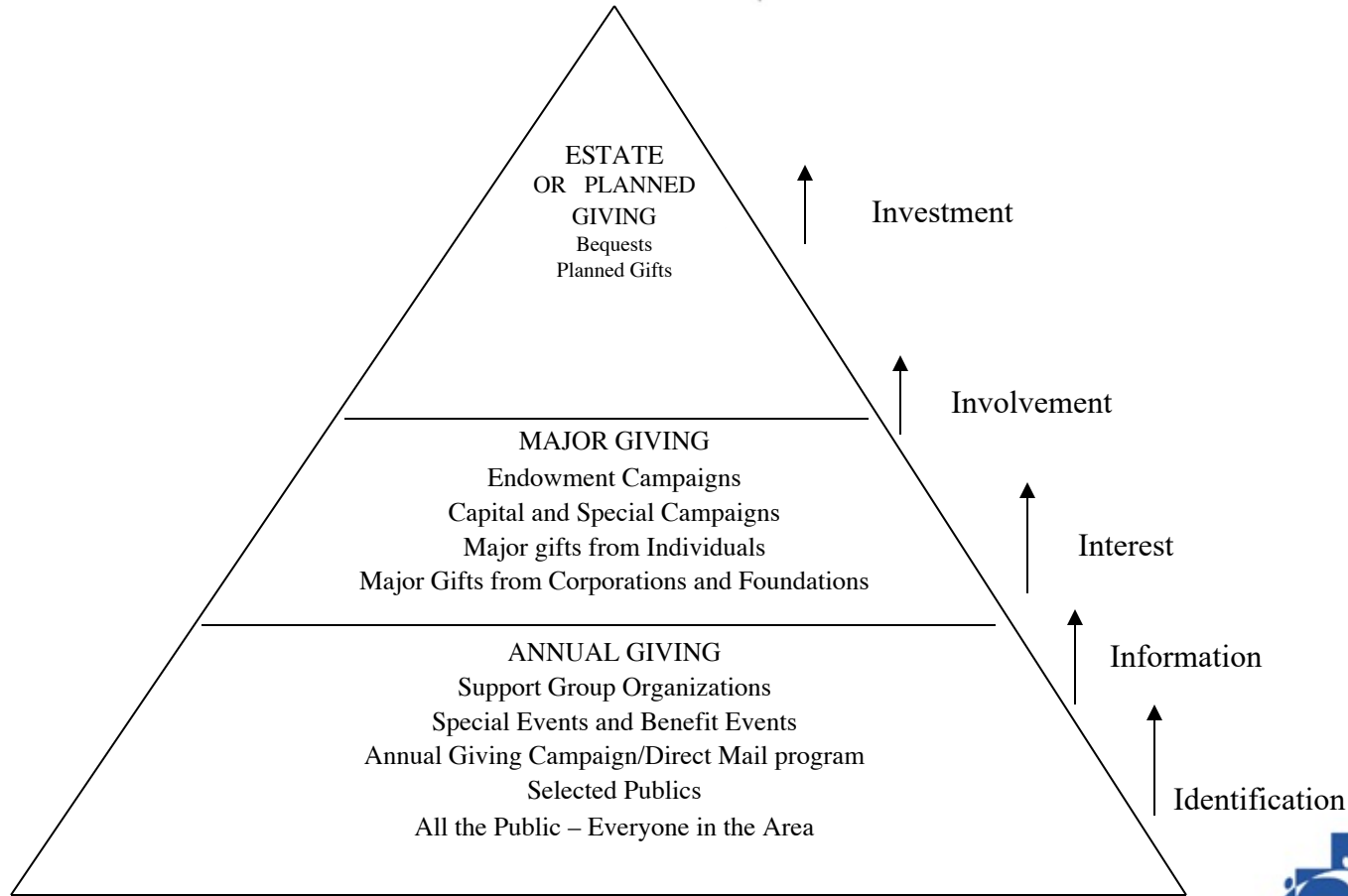
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*Why do you want to steward your donors?*

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*What does a stewardship plan look like?*



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Gift Planning

Capital Campaign (Major Gifts)

Annual Fund (Direct Mail & President's Council)  
\$250 and up

Business Development (Special Events, Corporations and Foundations)  
\$1,000 and up



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## Step #1

Gift Planning	Personal Thank-you Call and Follow up by Prospect Manager
Capital Campaign (Major Gifts)	Personal Thank-you Call and Follow up by Prospect Manager
Annual Fund (Direct Mail & President's Council) \$250 and up	Personal Thank-you Call and Follow up by Prospect Manager
Business Development (Special Events, Corporations and Foundations) \$1,000 and up	Personal Thank-you Call and Follow up by Prospect Manager



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## Step #2

	<h2>Step #2</h2>	
Gift Planning	Tax receipt & personal than-you from staff	Thank-you call from Board or Committee member
Capital Campaign (Major Gifts)	Tax receipt & personal than-you from staff	Thank-you call from Board or Committee member
Annual Fund (Direct Mail & President's Council) \$250 and up	Tax receipt & personal than-you from staff	Thank-you call from Board or Committee member
Business Development (Special Events, Corporations and Foundations) \$1,000 and up	Tax receipt & personal than-you from staff	Thank-you call from Board or Committee member



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	Step #3	
Gift Planning	Assign Prospects to a Prospect Manager (if needed)	Personal letter from beneficiary of funds; "What else can we do for you?"
Capital Campaign (Major Gifts)	Assign Prospects to a Prospect Manager (if needed)	Personal letter from beneficiary of funds; "What else can we do for you?"
Annual Fund (Direct Mail & President's Council) \$250 and up	Assign Prospects to a Prospect Manager (if needed)	Personal letter from beneficiary of funds; "What else can we do for you?"
Business Development (Special Events, Corporations and Foundations) \$1,000 and up	Assign Prospects to a Prospect Manager (if needed)	Personal letter from beneficiary of funds; "What else can we do for you?"

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## Step #4

Gift Planning	Face to face meeting with appropriate Foundation & Hospital Staff and Follow Up
Capital Campaign (Major Gifts)	Face to face meeting with appropriate Foundation & Hospital Staff and Follow Up
Annual Fund (Direct Mail & President's Council) \$250 and up	Face to face meeting with appropriate Foundation & Hospital Staff and Follow Up
Business Development (Special Events, Corporations and Foundations) \$1,000 and up	Face to face meeting with appropriate Foundation & Hospital Staff and Follow Up

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## Step #5

Gift Planning	Thank you call and Follow Up from Foundation Staff and/or volunteer regarding tour
Capital Campaign (Major Gifts)	Thank you call and Follow Up from Foundation Staff and/or volunteer regarding tour
Annual Fund (Direct Mail & President's Council) \$250 and up	Solicitation: Asked to increase giving level and/or frequency (Mail)
Business Development (Special Events, Corporations and Foundations) \$1,000 and up	Asked to sponsor X at an upcoming event  Official Report on completed sponsored events



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## Step #6

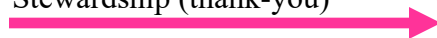
	<h2>Step #6</h2>	
Gift Planning	“Insider’s Report”	Donor is asked to provide names for next round of tours
Capital Campaign (Major Gifts)	“Insider’s Report”	Donor is asked to provide names for next round of tours
Annual Fund (Direct Mail & President’s Council) \$250 and up	“Insider’s Report”	Donor is asked to provide names for next round of tours
Business Development (Special Events, Corporations and Foundations) \$1,000 and up	“Insider’s Report”	Donor is asked to provide names for next round of tours

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Step #7		
Gift Planning		Update Donor Wall
Capital Campaign (Major Gifts)	Call before pledge reminder goes out to accelerate payment and notify of new opportunities	Update Donor Wall as well as being given chance to “move up” chart
Annual Fund (Direct Mail & President’s Council) \$250 and up	Call before pledge reminder goes out to accelerate payment and notify of new opportunities	Update Donor Wall as well as being given chance to “move up” chart  Report on Endowment
Business Development (Special Events, Corporations and Foundations) \$1,000 and up		Update Donor Wall

	STEP #1	STEP #2	STEP #3	STEP #4	STEP #5	STEP #6	STEP #7				
GIFT PLANNING	Thank you call and follow up by Prospect Manager	Tax receipt with thank you letter	Thank you call from volunteer	Assign to Prospect Manager (if needed)	Letter from beneficiary "What else can we do?"	Face to face meeting with Foundation & Hospital Staff and Follow Up	Thank you call regarding tour	"Insider's Report"	Donor asked to provide names for next round of tours		Update Donor Wall
CAPITAL CAMPAIGN	Thank you call and follow up by Prospect Manager	Tax receipt with thank you letter	Thank you call from volunteer	Assign to Prospect Manager (if needed)	Letter from beneficiary "What else can we do?"	Face to face meeting with Foundation & Hospital Staff and Follow Up	Thank you call regarding tour	"Insider's Report"	Donor asked to provide names for next round of tours	Call before pledge payment reminder goes out to accelerate payment and new opportunities	Update Donor Wall as well as being given chance to "move up" chart
ANNUAL FUND (\$250 +)	Thank you call and follow up by Prospect Manager	Tax receipt with thank you letter	Thank you call from volunteer	Assign to Prospect Manager (if needed)	Letter from beneficiary "What else can we do?"	Face to face meeting with Foundation & Hospital Staff and Follow Up	Solicitation: Asked to increase giving level and/or frequency	"Insider's Report"	Donor asked to provide names for next round of tours	Call before pledge payment reminder goes out to accelerate payment and new opportunities	Update Donor Wall as well as being given chance to "move up" chart  Report on Endowment
BUSINESS DEVELOP. (\$1,000 +)	Thank you call and follow up by Prospect Manager	Tax receipt with thank you letter	Thank you call from volunteer	Assign to Prospect Manager (if needed)	Letter from beneficiary "What else can we do?"	Face to face meeting with Foundation & Hospital Staff and Follow Up	Asked to sponsor X at an upcoming event  Official report on completed sponsored event	"Insider's Report"	Donor asked to provide names for next round of tours		Update Donor Wall

Stewardship (thank-you)



Cultivation (for next gift)

*How much time do you spend on stewardship?*

*How do you measure success in stewardship?*