



Donor Prospecting & Stewardship Toolkit

2025

Fundraising Plan Dashboard		1—2 Poor		3—4 Fair		5—6 Good		7—8 Better		9—10 Best		Past Future	
Key Performance Indicators													
Profile of Ideal Donor		You look to accept money from anyone who can fog a mirror. Not aware of ideal donor.		You know the traits of your ideal donor, but do not know how to reach or contact them.		Your database has enough of your ideal donors for now, but you would like to find more donors like them.		You know the profile of your ideal donor, but spend less than 1/2 of your time with donors giving top 80%		You devote 80% of your time to your ideal donor who makes up the top 80% of the gifts received.			
Clarity of Focus and Impact		You're not aware of how to clarify the focus of who you serve and the impact your nonprofit has.		You know why you serve those you are supposed to, but don't know how to communicate that to current and potential donors.		You are a good leader. You give clarity and direction to make an impact, but don't know how to communicate that to donors.		You lead well and develop great donor relationships, but you struggle with new and creative ways to tell your nonprofit's story.		You use your leadership skills to clarify focus and impact for those you work with, work for, donors and potential donors.			
Strategic Goals		You have never really thought about strategic goals. You are just trying to bring in enough money to keep the lights on.		You have a general idea of what your nonprofit does and the direction it should be going, but nothing is written.		You have a printed strategic focus and direction that your board has blessed. It sets your fundraising, growth & expenditures.		You have a printed strategic focus that is revisited annually with input from your community of stakeholders and board.		You have an in-depth 3-5 year strategic plan that was developed over a 12-18 month period of time with stakeholder involvement.			
Financial Targets		Competition is tough because donors feel that your service overlaps other nonprofits.		Your fundraising goals are almost being met because you articulate how your nonprofit is so effective.		Fundraising goals are usually met and sometimes exceeded because you demonstrate your nonprofit impact.		Fundraising goals are exceeded. You are articulating that you are the ones who can solve the problems.		You have many donors and gifts. You are continually re-evaluating strategic goals.			
Fundraising Sources		I have no idea where the bulk of our nonprofit income comes from.		We evaluate what we receive from each funding source, but don't know how to increase gift amount or size.		We know what each funding source has given for the last 3-5 years and project what they will give us again.		We reliably estimate funding sources giving potential . We have meetings to identify new prospective donors.		We are confident of the amount we will raise this year, where it will come from and plan that for next 3-5 years.			
Cultivation Strategies		We send out appeals and ask for money, but don't have staff or time to cultivate donors.		We have one cultivation event a year and thank our donors. There is no ask at the event. It is not well attended.		We have some cultivation events. We send out birthday and anniversary cards signed by staff and/or board.		We have regular cultivation events, send cards, thank our donors with a calendar program that prompts us.		We have excellent cultivation strategies & the entire development staff participates each day.			
Solicitation Strategies		I spend most of my time in the office and don't have time to meet with donors.		I know whom I should be contacting but don't know how I should connect with them.		I know some ways that I will be able to solicit donors and how much to ask.		I know whom to connect with, how to connect, how much money to ask and what the donor wants to support		I personally connect with all active donors regularly and know our lapsed and donor retention rate.			
Fund Development Calendar		We do not have a calendar for scheduling events, grants, appeals or social media posts.		We have a calendar with some grant due dates and reporting dates.		We have a calendar that lists all grant information, events, appeals, social media and who is responsible.		We have a detailed calendar that is shared at each development team meeting and with the board.		We have our calendar planned for the next 5 years with due dates and information that is needed.			
Balance		You never seem to have enough time to complete all you need to do and can't enjoy life.		You are accused of being a workaholic, but spend some quality time with those you love most.		You are satisfied with where you focus, do what you are supposed to do and still have time for fun.		You devote specific time to get organized, clean up and feel centered.		Your life feels like it is in the ideal balance with an adequate time spent at work, play and with loved ones.		Total Score	
Professional Pursuits		You do things on your own and don't consider that you may need coaching or a mentor.		You know what you need to do to be successful even though sometimes you could use just a little motivation.		You understand that you need to be learning and growing. You participate in a few webinars and workshops.		You allocate money in your budget to attend conferences to learn best practice ideas and incorporate them.		You take trainings several weeks per year and instruct others weekly on what you have learned.			

Donor Commitment Continuum

Donor Perspective

	Ignorance	Familiarity	Interest	Experience	Advocates	Ownership
Description	I may or may not recognize the name of the organization I am not familiar with what the organization does	I have heard of the organization I recognize the name of the organization I have a rough idea of what the organization does	I share the values of the organization I believe the organization's cause is a good one I am likely to read/scan the organization's promotional literature I may contribute occasional small gifts	I have seen/heard/felt the results of the organization's work I know the people in the organization I attend the organization's activities and events I believe the methods the organization uses to accomplish its mission are good I believe in the organization's leadership I am likely to contribute repeated and/or annual gifts relative to my finances	I participate in the organization's activities and events I take on leadership roles when asked I serve on committees and boards when asked I go beyond giving money to contribute time and energy to the organization as well I trust the people in the organization I feel like part of the organization I contribute repeated and/or annual gifts If my finances allow, I may contribute major gifts for special projects when asked I share the mission of the organization with friends and colleagues	I volunteer to take on leadership roles when I see a need I volunteer to serve on committees and boards I continually seek new ways to advance the mission My affiliation with the organization is an important part of who I am The organization's mission aligns with my own personal mission I am likely to make repeated major gifts for special projects The organization receives a large portion of my philanthropic giving
Donor Deliberations		Do I know what the organization does? Do I agree with what the organization does? Do I want to learn more about this organization?	Does this organization share my values? Is this organization's cause important to me? Do I owe this organization/cause anything? Do I trust the development professional and the Executive Director? Do I believe in the leadership of the organization?	Is this organization doing a good job? Do I approve of the methods used to accomplish the mission? Do I believe in the leadership of the organization? Am I getting an adequate return on my investment (good feeling, recognition, opportunity to make a difference, results)? Am I willing and able to give more to this organization? Are my contributions appreciated?	Are we doing a good job? Are we using the best methods to accomplish the mission? Are my contributions appreciated? Am I getting an adequate return on my investment (good feelings, recognition, opportunity to make a difference, results)? Do I feel valued and valuable? Do I enjoy my association with the organization and its people? Do I believe in the leadership of the organization? Can I afford to give more? Can I make the greatest contribution in this organization?	Am I proud of the job we are doing? Are we using the best methods to accomplish the mission? Am I getting an adequate return on my investment (good feelings, recognition, opportunity to make a difference, results)? Do I feel appreciated, valued and valuable? Do I enjoy my association with the organization and its people? Can I afford to give more? Can I ensure that the organization continues the work after I am gone? Do I want to leave behind a legacy?

As donors move to the right on the Donor Commitment Continuum, they must be engaged by a wider range of people from the organization



5 x 5 - Plan for Donors: Invite. Engage. Inform. Ask.

Donor Names: 1. _____ 2. _____ 3. _____ 4. _____ 5. _____

Relationship Builder (Volunteer/Staff): _____

Ideas	Month/Donor	1.	2.	3.	4.	5.
Phone Call In-Person Visit Birthday Card Anniversary Card Personal Note Newsletter Email Invitation to: Lunch/Coffee Club Tour Special Event Judge a Club Event Volunteer Serve on Committee Announcement: Campaign Success Program Success Youth of the Year Congratulations: Award Achievement Birth of a Grandchild Wedding Promotion	January					
	February					
	March					
	April					
	May					
	June					
	July					
	August					
	September					
	October					
	November					
	December					



EXAMPLE 5 x 5 - Plan for Donors: Invite. Engage. Inform. Ask.

Donor Names: 1. Ray Reding 2. Jean and Carl Logan 3. Flo and Duane Hilton 4. Darius Johnson 5. Barbara Walker

Relationship Builder (Volunteer/Staff): Brandi Worth

Ideas	Month/Donor	1. Reding	2. Logan	3. Hilton	4. Johnson	5. Walker
Phone Call In-Person Visit Birthday Card Anniversary Card Personal Note Newsletter Email Invitation to: Lunch/Coffee Club Tour Special Event Judge a Club Event Volunteer Serve on Committee Announcement: Campaign Success Program Success Youth of the Year Congratulations: Award Achievement Birth of a Grandchild Wedding Promotion	January	Birthday Card				Phone call to share impact from last year
	February	Valentine	Valentine	Valentine	Valentine	Valentine
	March				Club Tour	
	April	Judge Talent Show		Ask for advice on garden program		
	May		Send info on Club kids' academic performance	Take the Hiltons to lunch		
	June	Club tour			Invite Darius to chaperone zoo field trip	
	July		Ask Duane to speak to the Passport to Manhood group		Take Darius out for coffee	
	August			Club Tour		Club Tour
	September	ASK FOR SUPPORT	ASK FOR SUPPORT	ASK FOR SUPPORT	ASK FOR SUPPORT	ASK FOR SUPPORT
	October		Club Tour			
	November					
	December					Holiday card

Overcoming Psychological Barriers to Giving

Barriers: At their core, these are about human behavior.

- **Too Many Choices:** “I start to list all the possible grantees I could support and get overwhelmed.” They want to make the BEST choice, instead of just a good choice
- **Burdensome & Tedious Tasks:** Procrastination, paperwork, they choose the path of least resistance, which is lack of action
- **Lack of Urgency:** Issues are very big and require long-term solutions so there is no urgency. They don’t feel like taking action will have an impact now. (Reframe the issue by thinking about addressing the issue in a way that you can act now to prevent it from becoming even larger and insurmountable. Also, set your own deadlines and goals for small milestones, so donors can remain accountable to themselves to make grant toward a particular issue). Chunk it out, discover what is in our lane to control, get really clear about the “why” behind wanting to make a difference.
- **Fear of Attention and Public Scrutiny:** “I don’t want to get even more pitches for funding.” Big failures and controversies loom larger than the multitude of things that have gone well. More transparency leads to less public scrutiny.
- **Perceived Need to Learn More:** “I don’t know enough yet.” Not used to asking questions or being in unfamiliar territory.
- **Lack of Trust in Nonprofits and Others:** I want to know exactly how my money will be used. People sometimes see nonprofits as being warm and not necessarily competent, which isn’t true.
- **Possibility of Uncomfortable Family Dynamics:** If my children know about the scale of our wealth, they may lose drive and become spoiled rich kids.
- **Feeling Too Uncomfortable with Risk:** No standard way to measure progress and outcomes for my grants. People prefer to donate to less risky options, even when they are less effective. We dislike losses about twice as much as we like gains/wins. Taking risk is part of doing our job. Invest in something with the understanding that it will either be a success or a learning opportunity – there is no such thing as failure.
- **Operating in a Scarcity Mindset:** “My wealth fluctuates a lot so I don’t want to give too much away too fast.” There is no benchmark for success as you move into wealthier circles.

- **Lack of Time:** I am overwhelmed by how many things I have on my plate. Pick the thing and do what is right in front of you, even if it's not the most effective or highest priority.

Solutions for Overcoming Barriers:

Act: Motion begets momentum. Take on one small grant or one small task can that unlock other activities in a donor's philanthropy.

Reframe: Shift a mindset in how they view success. Help donors think about something in a new and different way.

Simplify: These people have complex lives. Narrow down the options. Anchor in a process so donors can understand the process.

Strategize: Think about ways a donor operates successfully in other aspects of their life and how you can piggy back this with their lives.

DONOR ACKNOWLEDGMENT PROTOCOLS

FIRST TIME DONORS (Best Practice to Call/Email all Donors)

\$0-\$250	Email or Call
\$250-\$500	Call
Over \$500	Call

ALL DONATIONS

\$250-\$500	Card signed by ED and Donor Relations Manager, Call from ED or DRM
\$500-\$1000	Card from Board Member, Call from ED or DRM
Over \$1000	Card from Board Member, Call from ED

Donor Acknowledgement Matrix

Strategy	\$100-\$250	\$250-\$500	\$1,000-\$10,000	\$10,000+	Everyone
Official letter with tax information – from Gardner (and Susan?)	✓	✓	✓	✓	✓
Added to Email Communications/Newsletter	✓	✓	✓	✓	✓
Invitation to special events	✓	✓	✓	✓	✓
Thank you from client	✓	✓	✓	✓	✓
Social media thank you		✓			
Recognition in Annual Report	✓	✓	✓	✓	✓
Thank You telephone call		\$500 ✓	✓	✓	✓
Handwritten note from Susan			✓	✓	✓
One-on-one meeting			✓	✓	✓
Donor thank you reception			✓	✓	✓
6 personal emails per year			✓	✓	✓
Thank you letter from Board member			✓	✓	✓
Invite to tour program or Ranch			✓	✓	✓
Profile in Newsletter				✓	✓
Video thank you				✓	✓
Gift anniversary recognition			✓	✓	✓
Photo booklet					✓



BOYS & GIRLS CLUBS

Sample Stewardship Calendar to Support Annual Campaign

Timeframe	Type of Stewardship	Stewardship Examples
Campaign Stewardship	• Invite donors to victory celebration • Send top donors a final progress/impact report of the campaign	Buy an ad in the local paper thanking donors for your successful campaign and their impact upon youth
Ongoing	• Thank you notes within 48 hrs of receipt of gift • Campaign Committee make thank you calls-within 48 hours of receipt of significant gifts • Handwritten thank you notes from staff and Board for significant gifts • Share articles and press about the Club and issues facing youth in the community • Invitations to Club events • Birthday cards for top donors • Donor visits to share impact report and news from the Club	Have a supply of handmade thank you cards from Club members on hand and take one to each donor visit
January	• Year End outcomes report • <i>Healthy Lifestyles</i> communications	• Ask your donors for their feedback about your work in the previous year • Invite donors to participate in the <i>Triple Play Family Challenge</i>
February	• Newsletter (electronic or printed)	• Send Valentine's Day cards made by Club members to top donors
March	• <i>Boys & Girls Club Week</i> communications	• Invite donors to take part in <i>Boys & Girls Club Week</i> activities.
April	• Spring thank-a-Thon • Receive Individual Giving Societies Annual Report publication from BGCA	• Invite donors to join the Club in the Million Hours of Service effort

May	• Newsletter • Mail or email Annual Report	• School's out - kids are back - invite donors to tour!
June	• Donor Recognition Reception	• Ask donors to take part in <i>Summer Brain Gain</i> by reading books with younger members
July	• Update email list	• Send donors news articles relevant to youth development
August	• Newsletter • Monthly Tour	• Back to School, back to the Club: Invite donors on a tour
September	• Fall thank-a-thon	• Invite donors to attend/judge the <i>Youth of the Year</i> competition
October	• Send donor names to BGCA for national recognition • Evaluate stewardship program	• Send Halloween postcards made by Club members to top donors
November	• Newsletter • Develop Holiday card • Receive lapel pins from BGCA • Change acknowledgement letters • Utilize BGCA's customizable <i>Give the Gift of a Great Future</i> marketing assets	• Invite donors to take part in the Club's Thanksgiving activities; stress that the Club is thankful for their support
December	• Send year end receipts summarizing all giving for tax purposes • Heavy focus year-end stewardship activities • Thank donors for their <i>Gift of a Great Future</i>	• Invite donors to attend any holiday parties being hosted for the kids • Year-end thank-a-thon • Deliver gifts or cookies made by the kids

BGCA tricks for RD

1. Master the art of gratitude and timeliness

A heartfelt, prompt "thank you" is foundational to donor retention. Nonprofits that send a personalized thank you within 48 hours of a first-time gift are much more likely to receive a second donation. For a large organization like BGCA, this means:

- Sending immediate, automated receipts for online gifts.
- Following up with a handwritten note or personal call for significant gifts.
- Enlisting board members and other key leaders to make calls to high-value donors.

2. Prioritize donor-centric storytelling

Donors are moved by stories, not statistics alone. Craft authentic narratives that show the direct impact of their support.

- Show, don't just tell: Use compelling visuals, such as photos and videos, of the kids and communities being served.
- Position the donor as the hero: Frame the story around how the donor's support enabled the positive outcome, not just the organization's actions.

3. Segment and personalize communications

Treating all donors the same is a quick path to disengagement. Segment donors based on their giving history, interests, and communication preferences.

- Major donors: Deliver high-touch, exclusive content and in-depth updates on specific projects they fund.
- Recurring donors: Provide consistent, behind-the-scenes updates to reinforce the impact of their ongoing support.
- First-time donors: Focus on welcoming them to the community and showing the effect of their initial gift.

4. Provide behind-the-scenes access

Offer exclusive experiences that make donors feel like insiders. This deepens their sense of belonging and strengthens their connection to the mission.

- Facility tours: Organize guided tours of a local Boys & Girls Club.
- Exclusive events: Host intimate luncheons or webinars with key leadership or program beneficiaries.

5. Engage donors beyond donations

A transactional relationship focused only on financial asks is unsustainable. Offer multiple ways for supporters to engage with the mission.

- Volunteer opportunities: Create clear paths for donors to give their time and see the organization's work firsthand.
- Expertise requests: Solicit advice from professional donors (e.g., lawyers, accountants) on specific organizational problems.

6. Leverage board connections

BGCA's extensive network of board members, both at the national and local levels, represents a powerful cultivation tool.

- Leverage introductions: Have board members make personal introductions to their networks.
- Engage in stewardship: Encourage board members to personally thank donors, which carries more weight than a message from staff.

7. Make giving easy and flexible

Reduce friction for donors by optimizing the giving process.

- Offer multiple options: Make it easy to donate online, via text, or through recurring gift programs.
- Highlight impact tiers: On donation pages, show what different gift amounts can accomplish (e.g., "\$50 funds a child's summer program").

8. Use data to drive strategy

BGCA can use its donor management system (CRM) to collect and analyze donor data, creating more effective and personalized strategies.

- Track behavior: Log every touchpoint—from event attendance to email opens—to understand donor engagement.
- Identify potential major donors: Use wealth screening tools to identify current mid-level donors who have the capacity to give larger gifts.

9. Create compelling visual communications

Visuals like photos, videos, and infographics are more engaging than text-only reports.

- Share success visually: Embed videos and photos in thank-you emails and social media updates.

- Simplify data: Use infographics to break down how donor funds are allocated in a visually appealing way.

10. Stay human and build trust

In all communications, remember that you are a person talking to another person.

- Maintain transparency: Be open about your organization's financials and how donations are used.
- Ask for feedback: Show that donor input is valued by soliciting their thoughts "I wasn't told I had to fundraise."

How to combat Board Members who say they can not fundraise

"I don't know any wealthy people."

This objection shows a misunderstanding of what makes a good prospect. Many valuable donors give smaller gifts or are known through their affinity for the organization, not their income.

- Overcoming the objection: Explain that your organization isn't looking for just "rich" people but rather people who are passionate about the mission. Help board members, volunteers, or staff map out their entire network—including friends, family, and colleagues—to find potential supporters at all giving levels.

"I wasn't told I had to fundraise."

This is a valid complaint if a nonprofit has not properly trained its board members. It often comes from individuals who feel caught off guard or duped by the organization.

- Overcoming the objection: The organization should clearly communicate that fundraising is a required responsibility. Reassure the individual that you will provide training and support to help them succeed.

"I'm already giving my time; isn't that enough?"

While time is a valuable contribution, a board member not also making a financial gift is unusual. It signals a lack of belief in the importance of their own financial contribution.

- Overcoming the objection: Explain that a financial gift from a board member is crucial for the financial health of the organization and reinforces a culture of giving. Articulate the importance of their personal "skin in the game" to build confidence with other donors.

"I don't like to talk about money."

This is a common emotional barrier. Many people fear that asking for money will harm a personal relationship.

- Overcoming the objection: Reframe the conversation away from money and toward impact. Train askers to focus on the organization's mission and the impact a donor can have, rather than the dollar amount. Role-playing and practice can build confidence.

"I don't think my donation will make a difference."

Donors may feel that the problem is too large and their potential gift is too small to have a real impact.

- Overcoming the objection: Tell a specific, compelling story that demonstrates how a gift of a certain size has made a tangible difference. Highlight individual

success stories to help the prospective donor see how they can personally contribute to a positive outcome.

"I need to talk to my spouse/partner."

This is often a stalling tactic or a way to get out of the meeting without saying no directly.

- Overcoming the objection: Respect the donor's decision and offer to schedule a follow-up meeting with both partners. By including the partner, you're not only showing that you've heard them but also increasing the potential for a larger, more thoughtful gift.

"I'm already donating to other causes."

Many philanthropists give to multiple charities, so this is not necessarily a final "no".

- Overcoming the objection: Congratulate the donor on their generosity and thank them for their support of other causes. Then, shift the focus to your organization's unique mission and ask if they would consider including your cause in their philanthropy.

Top Responses for Stewardship

- Donor thank you walls & plaques
- Business door signs & decals
- FB / social media shout-outs
- Website Donor page
- Text/email quick kid clips
- Board member birthday calls
- Goodie baskets delivered (to match season or holiday)
- Valentines mailed, other holiday cards
- Phone calls from kids and staff
- Lunch with the CEO
- Kid art, kids cards
- Ask for advice on community & Club
- Welcome Kid for new Club Members
- Guest Speaker at Club
- Face to face visits
- Regular, strategic communication
- Reporting on outcomes
- Impact Reports and updates
- Ask them to judge a Club activity/event
- Donor Surveys
- Networking with Board
- Phone calls from Board members
- Donor and Volunteer awards
- VIP seating at events
- Personalized thank you letters and cards
- Not sending tax letter first
- Welcome Kit for new donors



Converting Special Event Attendees and Event Volunteers to Annual Donors of Your Boys & Girls Club

INTRODUCTION

This document addresses the process of upgrading event attendees into Boys & Girls Club donors. It includes strategies for increasing awareness about your organization, engaging individuals in Club activities, and for facilitating cultivation and stewardship which will result in more revenue for your Club. Remember, no matter what the economic situation: every dollar counts!

THE ROLE OF SPECIAL EVENTS IN RESOURCE DEVELOPMENT

Resource development is a process that involves prospect research, case statement development, cultivation, fundraising strategies, personal solicitation, acknowledgement, recognition, and stewardship. Special events are an important part of the process and one of many strategies for increasing revenue for organizations. Events can and should be powerful starting points for motivating and cultivating attendees, especially those who are new to your organization, into loyal supporters and regular donors to your Club.

The Association of Fundraising Professionals (AFP) defines a fundraising event as “a fundraising function designed to attract and involve large numbers of people for the purpose of raising money and/or cultivating prospective donors” (AFP, Glossary of Fundraising Terms, 1996). Many Boys & Girls Clubs schedule fundraising events, such as golf tournaments, galas, auctions, receptions, and duck races, as part of the organization’s resource development plan and its overall comprehensive strategic plan. If your Boys & Girls Club does not have a resource development plan, we encourage you to create one using BGCA’s RD Planning Guide and Worksheets available on BGCA.net/RDCS. This tool developed by RD Club Services will assist you in guiding your board members and staff through a comprehensive resource development annual planning and goal-setting process.

Whatever the size of your organization, the event committee and staff spend a great amount of time setting goals, pursuing sponsors, donors, volunteers and attendees. After the event is over, and the internal celebration concludes, and the financial analysis is completed, there’s still work to be done!

Following are five simple steps to finding out more about your event attendees and turn them into supporters of your Club for years to come.

1. KNOW YOUR ATTENDEES, VOLUNTEERS AND POTENTIAL DONORS

Just as in direct mail, the chief executive officer, director of development and resource development chair are responsible for knowing who to invite to the event and why they are on the invitation list. Donor management software can make a big difference in your ability to strategically raise funds by helping you track attendees’ personal data, interests, and giving history. With or without software, it is strongly recommended that you examine the attendees on the list *before* the event and update your information about them immediately *after* the event.

Event volunteer information should also be added to your donor management software and can help you keep track of their personal data, interests and giving history. Just as event attendees can become potential donors, so can the volunteers helping run the event. We would recommend these three opportunities:

- First be sure to have the following information about event attendees and volunteers:
 - a. Name
 - b. Contact information that includes email, home address, home phone, and/or business address and business phone
 - c. Relationship to Boys & Girls Club – What involvement has the person had with the Club? Does this person know a Board member or staff member?

Converting Special Event Attendees and Event Volunteers to Annual Donors of Your Boys & Girls Club

- d. Past giving and support of Boys & Girls Club
- e. Other relevant information – such as information about the person’s ability to give and/or their giving to other institutions, and their birth date/year, age, anniversary
- Second, identify both attendees’ and volunteers’ potential to make an annual gift to the Boys & Girls Club by segmenting the list according to the following criteria:
 - a. Capacity to make an annual donation **NOW**. (Are they already donating to you or other organizations? Volunteers are already giving of their time so they will be more inclined to give financially as well.)
 - b. Interest in your cause or the children you help (Are they alumni of a Boys & Girls Club, do they have children or grandchildren who are members?)
 - c. Likelihood of making repeated donations. (Does their donor history show this loyalty? Have they volunteered multiple times with your organization?)
- Third, based on your analysis of this information, plan strategies to increase attendees’ and volunteers’ awareness about the organization by educating them about, and engaging them in, Boys & Girls Club programs and activities. The result will be an increased donor base and, with appropriate cultivation and stewardship, increased resources for your Club.

2. INCREASE AWARENESS ABOUT THE ORGANIZATION

Individuals who become familiar with, and become engaged in, the work of Boys & Girls Clubs are more likely to become donors. Volunteers are a good example since they are already involved with your Club in some capacity. Increasing the Club’s visibility and presence in your community usually gets people talking about the impact of your Club. Marketing itself doesn’t raise money, but it will create a heightened level of awareness, soften the market, and communicate the impact that your Club has on the lives of the young people in the community you serve.

While you are increasing awareness, look for ways by which you can grow and improve the relationship with the potential donor. This could include updates about the organization by mail or email, birthday cards, and Club tours. The Boys & Girls Clubs of Whittier shared: “We try to use every event as an opportunity to educate our guests. The printed [event] program contains program information in it, and we encourage [guests] to take it home and read it at their leisure. We also bring several kids to either perform or speak to have the face of the Club kids up close.” Volunteers at your events will also be hearing and seeing these messages.

The Boys & Girls Clubs of Buffalo hosts “Thursday at the Club” as a cultivation and stewardship activity that also raises the community’s awareness about the Club’s programs and services. Board members bring their friends and/or potential donors on a tour of the organization’s sixteen Club sites to meet members and hear their stories about why they attend the Boys & Girls Clubs. Keystone Club members and Youth of the Year participants give the tours and help answer questions. You may want to ask volunteers if they’d like to attend this type of event so they can learn more about the Club beyond their volunteer experience.

3. GET AND KEEP INDIVIDUALS ENGAGED IN THE ORGANIZATION

What if you don’t have the names and addresses of those people who attend the gala or dinner at a table purchased by their company or even those that volunteer? Or what about those guests who participated as part of a sponsor’s golf foursome? The answer could be found in the following three suggestions for capturing names:

Converting Special Event Attendees and Event Volunteers to Annual Donors of Your Boys & Girls Club

1. Provide an opportunity for raffle drawing for door prizes and/or giveaways. The drawing ticket can be customized to include personal data, name, organization email, etc. Business cards can be collected as well.
2. Have guests sign a “guest book” at the door. Invite volunteers to register in the book as well when they arrive.
3. Some organizations use the RSVP method and follow up to confirm attendance as a way to get names of individuals. Identification in addition to name and company could also lead to finding out about their values and motivations and what is most important to them.

“Money follows involvement” is a key fundraising principle (Alexander, G.D. and Carlson, K. *Essential Principles for Fundraising Success*, Jossey-Bass, September 2005). You do not know in the beginning which donors are likely to turn into major donors so the best strategy is to steward all donors carefully. After an event, reach out to participants and ask to meet with them. Usually it’s only a 10-15 minute meeting, but if you ask them what they thought of the event and why they attended, you will learn more about the prospect and it could lead to an opportunity to build a relationship or get them more engaged with the Club. You can use this strategy with volunteers as well. By recognizing volunteers and gaining feedback from them, your Club can benefit by learning additional information and creating a better relationship with volunteers as well.

Stewardship of these prospects is also an important cultivation strategy. Ideas for stewarding event attendees include sending a personalized post-event thank you note, email update, newsletter or Club impact report. Personalized letters to donors at a certain level—perhaps \$500 or more—are also an excellent way to steward donors or volunteers. The person with the closest connection to the donor should write this letter – whether that person is a board volunteer, a staff member, an alumni or a sponsor who invited the prospect as their guest to the event.

4. INCREASE YOUR REVENUE

After you have educated and engaged event attendees and volunteers about your Boys & Girls Club—whether in print, electronically, or in person—use the available information you have collected to assess their potential level of giving. Your approach will depend on the methods your organization utilizes for donor cultivation and giving options, such as annual or capital campaigns, gifts of cash or stock, legacy gifts, and gifts-in-kind.

You may want to start with a simple request for the prospect to contribute to your annual campaign (make sure you have a monthly giving option!). Or, if the person has the potential to be a major or legacy donor, you may want the CEO or a board member to reach out to them to set up a meeting to learn more about their interests.

There is also an opportunity to add the remainder of the event attendees and volunteers to the targeted appeal direct mailing list. Typically, a donor will know that the solicitation is coming if you have sufficiently cultivated them. No matter what your approach, you want to ask for a gift! Once you receive it, continue to develop a strategy of stewardship and future cultivation to keep your donor engaged, interested, and giving.

5. REMEMBER TO SAY “THANK YOU!”

Regardless of your prospect or donors’ level of participation in your event, all event attendees and volunteers should be thanked for their participation, preferably in a handwritten note by the person responsible for their invitation. Their attendance may be their first experience with your Club, and you need to make a positive impression if you intend to turn them into a more significant, dedicated donor.

Converting Special Event Attendees and Event Volunteers to Annual Donors of Your Boys & Girls Club

Appreciation of your donors can make a lasting impression, even for those very familiar with your organization.

SUMMARY

Fundraising events are rich opportunities to raise immediate funds, expand your donor base, and to increase your organization's revenue through future gifts. By knowing your attendees and volunteers, educating them about your organization, and engaging them in its activities, you are laying the groundwork for enhanced resource development for your Club. Invite, educate, engage, ask, and thank your potential donors. These are five simple steps to making sure that your Club members will have the programs and services they need.

During any economic climate, it's important that *all your donors, stakeholders and prospects - new and existing* - understand what their investment does for the community, the Club and the kids you serve. Now, more than ever, the kids are depending on us.

Get started right away using the following checklist.

Special Event Attendee Follow-Up Checklist

- ☐ Make sure you find a way to collect name and address (and more!) information from your attendees during your special event.
- ☐ Ensure data about each event attendee and volunteer is entered into your donor management system.
- ☐ Send a final event celebration/thank you to all attendees announcing event totals and the impact that the funds will have on your Club and community.
- ☐ Send more information (e.g. your newsletter, Annual Report, Club Impact Report) to all event attendees and volunteers.
- ☐ Invite top event donors to a Club tour or other Club event once per quarter.
- ☐ Select top 10 percent of individual attendees (and regular event volunteers) and conduct prospecting research to determine if they are ready for a face-to-face visit/solicitation.
- ☐ Ask for a gift – small or large.
- ☐ Send a thank you letter within one week after each gift is received.



BOYS & GIRLS CLUBS

BGC Northwest Colorado Board of Directors Individual Development Plan for _____2022

Please complete this form as your 2022 fundraising plan, by confirming your personal gift, choosing the donor development activities you will participate in and setting goals in those areas. It is important that each Board member commits to at least one donor development activity. Please complete your plan by June 1.

1. Personal Gift / Sponsorship

Board members of the Boys & Girls Clubs of Northwest Colorado are each expected to make an annual gift in an amount that is personally significant to them. My personal donation for 2022: \$_____

A. Event Sponsorships

- ☐ Be Great Bash \$_____
- ☐ Steamboat Hoedown \$_____
- ☐ Yahoo Golf Tournament \$_____
- ☐ Cowboy Christmas \$_____
- ☐ Yampa Valley Gives Day \$_____
- ☐ End of Year Match Challenge \$_____
- ☐ Youth of the Year Event \$_____
- ☐ Youth of the Year Scholarship \$_____
- ☐ General Operating, not event specific \$_____

B. Engagement

- ☐ Attend BGCNWC events and send information on events to donors and prospects.
- ☐ Invite friends and relatives to attend events.
- ☐ Participate on an Event Committee to help Club staff plan and execute events.

2. Donor Development Activities

A. Identify Prospective Donors

- ☐ **Provide a list of prospects for donor cultivation and solicitation.**
The Executive Director and Development Director will work one-on-one with you to develop an effective strategy for inviting your family, friends or colleagues to support the work of the BGCNWC
- ☐ **Arrange a prospective donor meeting with an individual or a contact of a corporation or foundation that can provide new funding to the BGCNWC.**
- ☐ **Watch for names of prospects from annual reports, newspapers, etc., and send to staff.**
- ☐ **Host a Cultivation Event ("A Party with a Purpose").**
Cultivation events (or house parties) can be used to educate friends, family and colleagues (and prospective donors) about the BGCNWC. By hosting a party, you underwrite the cost of food and drink and open up your home, club or office to contacts you'd like to introduce to the organization. This is not a fundraising event and there is no expectation that guests will contribute at the party.



BOYS & GIRLS CLUBS

B. Donor Cultivation

- ☐ **Meet with prospective donors to create relationships and share your personal story.**
Getting to know prospects – what motivates or inspires them about our mission – is an important step in cultivating the donor and building a long-term relationship. Participate in meetings with Club staff or meet with donors (for lunch, coffee etc) on your own.
- ☐ **Participate in building relationships with prospective donors by hosting tours of the Club.**

C. Major Donor Solicitation

- ☐ **Assist Executive Director and, if applicable, Development Director, in face to face meetings to solicit funds from a donor prospect.**
Raising unrestricted funds is an important component of BGCNWC's fundraising plan and solicitations from donors is an important component.

D. Stewardship and Thanking Donors

- ☐ **Make thank-you calls to donors and supporters.**
This activity involves calling donors and saying "thank you" for their gift. You will be given information and assistance to make these thank you calls.
- ☐ **Write notes to donors on thank you cards, event invitations, solicitation letters, impact reports, etc.**
- ☐ **Encourage donors who you know to tour the Club.**
Showing their dollars in action will make them proud of their donation and able to tell the story of the Boys & Girls Clubs of Northwest Colorado to their friends.
- ☐ **Participate in other stewardship activities.**
Get involved in other ways the Club thanks or recognizes donors (examples: delivering gifts during the holidays, hosting or assisting with recognition events, engaging with kids).
Ideas: _____

3. Other Engagement Opportunities

A. Attend Meetings.

- ☐ **Attend and actively participate in at least 3 Board meetings annually.**

B. Other ways to support fundraising.

Please include ways you can volunteer your services or other ways you hope to raise funds for the organization (e.g., auction items, in-kind donations).

I agree to fulfill the above-stated fundraising goals to the best of my ability.

Board Member Signature

Date



BOARD BRIEF: Strategies for the Ask

Board Briefs are "at-a-glance" resources that help board volunteers better support their Boys & Girls Club. They are designed to occur as five-minute education opportunities at board meetings.

SUMMARY

No matter how well-planned your resource development program is, you can not avoid the "ask" – the *closing of the deal*. The three most common ways to ask are: in person, by telephone or by mail/email. Sometimes, a combination is used, but keep in mind that the key to success is effective cultivation. Finally, once a contribution is made, it is critically important that the solicitor and Club leadership effectively steward the donor so a relationship can be built.

STRATEGIES FOR THE ASK

Person-to-Person

This is by far, the *most effective* way to solicit funds, particularly when done by a peer of the prospect. This method, therefore, is best for top prospects such as the board, major donors and prospects for restricted gifts. The visit can be made solo or as a pair. Studies show that face-to-face asks are 16 times more effective than telephone solicitation!

Volunteer solicitors should be *trained* so they know: how to secure an appointment with a prospect; and how to effectively solicit. Ideally, solicitors will be comfortable, passionate and willing to ask others to make introductions and join in the cultivation process.

Telephone Solicitation

Calling prospects on the phone can be effective if: they are already acquainted with your Boys & Girls Club *and* you are asking them to renew or upgrade their support. In these instances, a phone call is more personal than mail and more cost effective. Cold calls are difficult to make, although a study in late 1998 found that one out of 10 individuals were willing to make a gift to an organization they had not previously supported.

Mail Solicitation

This is the *most costly and ineffective* method of asking for money. However, there is a difference between direct mail and targeted mail.

- **Direct Mail** – sent to a large number of people who are not qualified/connected to the organization, but meet some demographic characteristic (i.e., family income, zip code). The return on direct mail is an unimpressive 0-2%, and most gifts are small. One benefit of this methods is identification of potential new donors to be cultivated through a select mail list.

- **Targeted Mail** – more personal; sent to individuals *acquainted* with your Boys & Girls Club. This kind of mail is often preceded or followed by a telephone call. Prospects are usually repeat givers. A reply envelope and pledge card is important to increase your response rate.
- **Email** – sent to targeted individuals; the opportunity to respond online is as important as a reply envelope in direct and targeted mail.

SPECIAL ROLE OF BOARD

Some boards use *personal stationary* for mailing their friends and business associates asking for a contribution. The letter can follow a script or be a personal appeal based on shared knowledge and include a specific request and clear expectations to respond (a pledge card is helpful) in a self-addressed, stamped envelope.

Board members also act as *solicitors* to make personal calls on major donor prospects, and sometimes do follow up by phone. To be effective as a solicitor, each board member should first make his or her own gift to the Club.

LOOKING FOR DONOR MOTIVATION

It is important to know what motivates donors to give, and then make the appeal as personal as possible. This should be learned during the cultivation phase. The motivation for foundations (in business to make grants) is quite different from that of corporations (business reasons).

Individual donors, however, give for a variety reasons, such as:

- **Consistency with Personal Values** – the Club expresses *values similar* to the donor;
- **Altruism** – a donor *cares* about the Boys & Girls Club, believes in its leadership, wants to help the Club do its work and make a difference to improve lives in their community;
- **In Gratitude** – donor is a *former Club member* or had relatives who were members;
- **To Receive/Exchange Something of Value** – from a simple, *intangible* thing such as friendship or recognition to something *tangible* like a T-shirt or tote bag;
- **Because They Are Asked** –many people give simply because somebody asked them. The ask is particularly effective if done by someone the donor does not want to disappoint!

Seldom do people give for tax deduction purposes. Although it is an important tool, a tax writeoff is usually considered as a bonus rather than a motivating factor.

RAISING THE STANDARD OF PHILANTHROPY

No Boys & Girls Club should ever feel as if it is begging. Donors get something for their contributions! By investing in the Club, donors can know they are improving the lives of children served. Philanthropy is described as love for humankind, and it is based on "voluntary action for the common good!"

