



Reimagining Fundraising:

Meeting Today's Challenges and Tomorrow's Opportunities

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Warm up:
What words come to mind when you hear "fundraising"?

Today, we will discuss...

- ✓ The current landscape of philanthropy--challenges and opportunities
- ✓ Strategies to meet the moment
 - Diversifying funding sources...and finding new donors
 - Understanding and overcoming psychological barriers to giving
 - Working "above and below the line" of the gift planning horizon
 - Cultivating and stewarding legacy gifts
 - Maximizing board engagement
 - Partnering with other nonprofits
- ✓ The importance of cultivating an abundance mindset

Hot Topics in Philanthropy

The Exodus of Everyday Donors Is Bad for America. Here's How to Stop It.

The decline in charitable giving by average Americans threatens democracy. Among the solutions: pooled micro-donations, giving incentives, and a focus on the donor relationship.

By Victoria Yorne | MAY 13, 2024

NEWS & STORIES

Meet the Moment: A Call to Action for Philanthropy in 2025 (and Beyond)

Geofunders.org

MacKenzie Scott's \$19 billion in donations has been "transformational"

April 01, 2024 10:21 PM EDT | Updated April 01, 2024 10:21 PM EDT

Billionaire and philanthropist MacKenzie Scott has donated over \$19 billion to over 2,000 organizations in the past five years.

PHOTOS

How Philanthropy Can Bring Red and Blue Together

Grass markets of almost every kind have an abundance of opportunities to rally us for the common good.

By David Levine Richardson | MARCH 13, 2023

How Nonprofits Are Fundraising Amid 'Scary, Challenging Time'

After cuts in federal spending, charities are making carefully worded appeals to donors to continue critical programs.

By Rebecca Childress | MARCH 13, 2023



Diversifying Funding Sources

Typical Nonprofit Revenue Sources

- Individuals and Families
- Events and sponsorships
- Government grants
- Institutional grants
- Earned Revenue
- Corporate grants
- Planned Giving
- Investment income

Innovative Revenue Opportunities

- Loans & program related investments
- Cause marketing
- Peer to peer
- Crowd-funding
- Giving Circles

Understanding Barriers to Giving

According to a recent National Center for Family Philanthropy study, these are donor's psychological barriers...

- Too many choices
- Burdensome administrative tasks
- Lack of urgency
- Fear of public attention
- Worry about needing to learn more to make decisions
- Lack of trust
- Uncomfortable family dynamics
- Uncomfortable with risk and uncertainty
- Scarcity mindset
- Lack of time

Overcoming Barriers to Giving

Crosscutting Solutions

Act
Reframe
Simplify
Connect
Get Help



Understanding the Charitable Planning Horizon

Why?

Inspiration, Vision, Purpose, Goals, Outcomes

How?

Timing

Immediate
Monthly
Multi-year
Legacy

Assets

Stocks, bonds, and mutual funds
Life insurance and retirement
accounts
Charitable bequests
Real estate
Cryptocurrency ...

Giving Vehicles

Donor advised funds
Beneficiary designations
Charitable Remainder Trusts
Charitable Lead Trusts
Charitable Gift Annuities

Cultivating and Stewarding Legacy Gifts

A legacy plan is so much more than just the monetary gift and the nuts and bolts of the charitable disbursements themselves.

Legacy Planning...

- ✓ Gets people excited about being a part of solving local/regional/national/international problems and safeguarding areas where things are doing well.
- ✓ Unlocks financial resources that might otherwise leave our region
- ✓ Provides an opportunity for people to share their values and vision for the future
- ✓ Creates a reservoir of future support to ensure that non-profits are vibrant and resilient--ready to weather future storms that we have not yet contemplated
- ✓ Captures the unique giving stories of every donor that become a part of our communal history
- ✓ Creates a culture of philanthropy that will be a part of our region for generations to come

Maximizing Board Engagement



Leaders

Determine path for organizational growth and lead fundraising strategy

Donors

Make a gift that is personally meaningful.

Ambassadors

Introduce new people to the organization and represent the organization in the community

Stewards

Express gratitude to supporters and keep them engaged

Everyone has unique skills, relationships and personal style to bring to these roles!

Identifying Board Member Superpowers

Most Board Member “Superpowers” fall into these categories:

- Expertise/Knowledge
- Hidden Talent
- Motivation to Learn



Partnership With Other Nonprofits



3 Types of Partnership

Cooperation
Coordination
Collaboration

How to make it work...

Candor and information sharing
Agreeing on what success looks like
Defining roles
Extending gratitude
Evaluating results

Cultivate an **Abundance Mindset**

Optimism

Possibilities

Opportunity



Collaboration

Trust

Long-term thinking

Openness to new ideas



THANK YOU

FOR HAVING ME

Please **reach out** if we can be of service:

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