Fundraising Opportunities in Your Community
Are You Fundraising Ready?

- Mission and Goals
- Annual Workplan
- Board and Volunteer Support
- Budget
- Fundraising Plan
Do you have??

A clear mission and goals?

Why are you monitoring?

What is your product?

“Work with citizens and government to restore the river’s water quality to fishable, swimmable standards and to protect the river corridor”

--Organization for the Assabet River
Are You Fundraising Ready?

Do you have??

An annual workplan?

<table>
<thead>
<tr>
<th>(I) POLICY DEVELOP/COORDINATE RIVER AND WATERSHED PROTECTION</th>
<th>(II) SUPPORT and EMPOWER WATERSHED COUNCILS</th>
<th>(III) FOSTER PUBLIC INVOLVEMENT IN RIVER PROTECTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Update RI Rivers Policy and Classification Plan revisions</td>
<td>Recognize new Watershed Councils to achieve goal of 100% coverage of the state’s watersheds</td>
<td>Organize Third Annual Land and Water Conservation Summit (March 11, 2006)</td>
</tr>
<tr>
<td>-- committee recommendations</td>
<td></td>
<td></td>
</tr>
<tr>
<td>-- incorporate flow considerations</td>
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</tr>
<tr>
<td>Participate in RI Bay, Rivers and Watersheds Coordination Team as advocate for river issues and the role of local watershed councils</td>
<td>Provide Targeted Organizational Assessment and Capacity Building to recognized watershed councils</td>
<td>Celebrate Rivers Month with Awards Celebration and Rivers Month Calendar</td>
</tr>
<tr>
<td>Review state legislation, policies and regulations for river and watershed protection, identify gaps and develop strategies to address these gaps.</td>
<td>Provide assistance to Watershed Councils on the Implementation of the Notice Regulation</td>
<td>Organize Environmental Awareness Day at Narragansett Beach</td>
</tr>
<tr>
<td>Develop back-office support services for conservation non-profits (Donor member management and volunteer support)</td>
<td></td>
<td>Organize and host Watershed Stewards Program to attract new members for Watershed Councils and provide basic understanding of watershed protection</td>
</tr>
<tr>
<td>Develop and implement grant making program for 2006 using Legislative Grant</td>
<td></td>
<td>Develop river trail conceptual plan for urban rivers</td>
</tr>
</tbody>
</table>

RHODE ISLAND RIVERS COUNCIL
WORKPLAN SUMMARY 2006

River Alliance of Wisconsin

Connecting People, Saving Rivers
Are You Fundraising Ready?

Do you have??

A Board of Directors and volunteers committed and involved in the organization?
Are You Fundraising Ready?

Do you have...

☑️ An annual income and expense budget?

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### Friendly Watershed Council Operating Budget

<table>
<thead>
<tr>
<th>Revenue and Support:</th>
<th>Annual Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td>Foundation</td>
<td>$75,000</td>
</tr>
<tr>
<td>River Festival</td>
<td>55,000</td>
</tr>
<tr>
<td>Corp Giving/Sponsorships</td>
<td>40,000</td>
</tr>
<tr>
<td>Individual &amp; Workplace Giving</td>
<td>40,000</td>
</tr>
<tr>
<td>Government Contract</td>
<td>34,000</td>
</tr>
<tr>
<td>Fees for Service</td>
<td>10,000</td>
</tr>
<tr>
<td>Board Contributions</td>
<td>10,000</td>
</tr>
<tr>
<td>Sale of Materials</td>
<td>5,500</td>
</tr>
<tr>
<td>Interest Income</td>
<td>1,000</td>
</tr>
<tr>
<td>In-kind Donations</td>
<td>5,000</td>
</tr>
<tr>
<td>Other</td>
<td>4,000</td>
</tr>
<tr>
<td><strong>Total Revenue:</strong></td>
<td><strong>$275,500</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Costs and expenses:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Salaries</td>
<td>$108,275</td>
</tr>
<tr>
<td>Taxes &amp; Fringe Benefits</td>
<td>26,550</td>
</tr>
<tr>
<td>Consultants</td>
<td>15,500</td>
</tr>
<tr>
<td>Workshops/Trainings</td>
<td>12,000</td>
</tr>
<tr>
<td>Printing</td>
<td>12,750</td>
</tr>
<tr>
<td>Staff Travel</td>
<td>4,000</td>
</tr>
<tr>
<td>River Festival</td>
<td>29,750</td>
</tr>
<tr>
<td>Telecommunications</td>
<td>8,500</td>
</tr>
<tr>
<td>Postage &amp; Shipping</td>
<td>8,500</td>
</tr>
<tr>
<td>Materials &amp; Supplies</td>
<td>13,125</td>
</tr>
<tr>
<td>Occupancy</td>
<td>11,000</td>
</tr>
<tr>
<td>Insurance</td>
<td>3,500</td>
</tr>
<tr>
<td>Donor Recognition</td>
<td>1,200</td>
</tr>
<tr>
<td>In-kind Expense</td>
<td>5,000</td>
</tr>
<tr>
<td><strong>Total Expenses:</strong></td>
<td><strong>$259,650</strong></td>
</tr>
</tbody>
</table>

**Net Surplus (deficit)** $15,850
Then, you need a fundraising plan

<table>
<thead>
<tr>
<th>Strategy</th>
<th>Goal(s)</th>
<th>Action Steps</th>
<th>Who</th>
<th>When/How Much</th>
</tr>
</thead>
</table>
| 1. New Member Acquisition | 200 new members, $4,000 | 1. Do a direct mail campaign to 5,000 prospects, 1.5% response=75  
2. Each board member recruits 5 new members(45)  
3. Participants in raft trips become members(50)  
4. Buyers of books of raffle tickets become members(30) | Staff with help of consultant Board  
Staff                          | May & Sept/$4,000 monthly/no cost  
summer/no cost  
fall/no cost |
| 2. Renewals            | 100 out of 154(65%)@$35 dues $3,500 | 1. Call last year's unrenewed members, asking them to renew  
2. Do 3 mailings to current members, spaced 1 month apart  
3. Call unrenewed members, asking them to renew | Staff & volunteers  
Staff                          | January/$50  
Jan, Feb, Mar/$400  
May/$50 |
| 3. Special Appeals     | 454 names @10% response, $10 ave. gift $50 | 1. Prepare a special appeal to all members on lawsuit; | Staff                          | Mid-November/$400 |
Choices for Building Your Base of Support
Choices for building …

…your base of support

A
- Individual donors
  - Grants, contracts
  - One-time gifts

B
- Contracts and grants
  - One-time gifts (legacies, corporate gifts, etc)
  - Individual donors
Pros & Cons?

**FLEXIBILITY**

- **More**
  - Membership
  - Major Donor Gifts
  - Business Supporters
  - Foundation General Support Grants

- **Less**
  - Government Project Grants

**PREDICTABILITY**

- **Restricted $$**
- **Unrestricted $$**

---

**Unrestricted**

**Restricted**
Where do private donations come from?

2004 Contributions: $248.52 Billion
By Source of Contributions

- Individuals: 75.6%
- Corporations: 4.8%
- Foundations: 11.6%
- Bequests: 8.0%

Source: Giving USA Foundation™ — AAFRC Trust
For Philanthropy/Giving USA 2005
Where do they go?

“Environment & Animals”
$7.6 Billion
(3.1% of total private gifts)

Source: Giving USA Foundation™ — AAFRC Trust
For Philanthropy/Giving USA 2005
“Typical” income for staffed environmental groups*

- Grants 48%
- Foundation, Government, Corporate
- Membership 17%
- Earned Income 13%
- Individual Donors 13%
- Events 3%

*Source: Mott Foundation survey of 758 groups in the Great Lakes and Southeast States
What’s typical for watershed groups?

2005 Data for groups seeking assistance with River Network and other trainers in the Watershed Support Network
What do we know about individual donors?

- Americans give about 2% of their income.
- Giving (as a % of income) tends to go up with age.
- Members of organized religious groups tend to give more than non-members.
- “Volunteers” give more than non-volunteers.
Why do individuals give?

$ Because they are specifically asked
$ Because they are inherently generous
$ People give to positive enthusiastic people
$ To share a joy or loss
$ To be to part of a community or organization
$ To receive peer approval and recognition
$ To gain tax and financial planning benefits
But why does ANYONE give?

Because they have been effectively asked!
How to Ask:
Ladder of Effectiveness

- Face-to-face Request (50%)
- Personal Phone Call (25%)
- Personal Letter (15%)
- Phone-a-thon (10%)
- Special “In-house” Mail Appeal (6-10%)
- Direct Mail Prospecting (1-3%)
- Online (?)
Top Funding Strategies
Top Strategies

1. Member Recruiting
2. Member Renewals
3. Special Appeals
4. Major Donor Program
5. Events
6. Corporate Grants & Sponsorships
7. Foundation grants
8. Government grants
Member Recruiting

You need:

✓ A compelling, long-term mission
✓ Commitment of board and staff
✓ Good prospects
✓ Well-written solicitation materials
✓ A good database for tracking response
✓ For large direct mails, professional advice
Member Recruiting

Valley Stewardship Network

Become a Member

Join your friends and neighbors in supporting a sustainable future for the Kickapoo Valley.

Standard Membership Levels:

- Valley Steward: $15 - $25
- Watershed Sustainer: $50
- Watershed Patron: $100
- Watershed Guardian: $200
- Visionary: $500 and higher

All donations of any amount are very much appreciated!!
Member Recruiting

• Builds organization
• Source of volunteers, event participants, special appeal donors, major donors
• Source of clout for organization

• Time consuming
• Requires significant initial investment
• Not appropriate for all groups
Member Renewals

You need:

✓ Resources to maintain database, service and renew members
✓ Good program for informing and involving members
✓ Good system for sending our a series of renewal notices
February 17, 2004

Dear Friend of Wisconsin’s Rivers,

Your membership in River Alliance of Wisconsin will expire shortly.

Stay with us! Please return the enclosed Annual Membership Reply Form along with your renewal gift as soon as possible.

When you do, you will continue to receive all the great benefits of River Alliance membership. Most importantly, your donation will help us build on the successes we have generated over the last ten years to protect your special places.

Renew your membership today!

Please take a moment to renew the enclosed form with your generous donation and continue to be a part of the growing statewide grassroots effort to protect and restore Wisconsin’s waters! Or, visit us online at www.wisconsinsrivers.org and renew without the postage!

We hope that you agree... we do our best to reach you and keep you up-to-date. Renewing your membership will help support a group that gets results. We continue to:

- build a statewide network of organizations to improve local rivers and watersheds
- advocate for legislation and policies that restore your flowing waters while opposing policies that degrade them
- educate citizens on the benefits of healthy rivers for their use and enjoyment
Special Appeals

You need:

✓ Membership/donor base
✓ Compelling project or opportunity
✓ Well-written appeal letter
Major Donor Program (including board)

You need:

✓ Base of members/contributors
✓ Credible “askers”
✓ Some research capability
✓ Strong board involvement a plus
Events

You need:

- Member/donor base or good mailing list(s)
- Volunteers
- Financial resources/expertise to execute
Corporate Grants and Sponsorships

You need:

- Credibility
- Strong, non-controversial projects
- Visibility and other benefits for corporation
- Contacts within corporation can help
Adopt-a-River

- Upper Merrimack Monitoring Program
  - Monitoring site sponsors
    - $300
    - Actively involve sponsors
    - Variety of sponsors: Wastewater treatment facility, municipalities, schools, small businesses
  - Public recognition
    - Certificates
    - News articles

Volunteer Monitor Summer ‘04
grant guidelines  enviro action

Patagonia funds only environmental work. We are most interested in making grants to organizations that identify and work on the root causes of problems and that approach issues with a commitment to long-term change. We look for programs with a clear agenda for change and a strategic plan for achieving the organization’s goals. Because we believe that true change will occur only through a strong grassroots movement, our funding focuses on organizations that build a strong base of citizen support.

We fund work that:

- is action-oriented
- builds public involvement and support
- is strategic
- focuses on root causes
- accomplishes specific goals and objectives
- takes place in communities in which we do business
In-Kind Gifts

WISH LIST:

✓ Water quality sampling equipment
✓ Refreshments for volunteers
✓ Gas cards for volunteers
✓ A new or used computer
✓ Office space
✓ Bookkeeping services
✓ Items for our spring auction
Thank Donors!

- Personal letter
- Newsletter
- Website
- Annual report
- During an event
- Grocery store
- You can never sincerely thank a donor too much!
Questions?
Resources

• River Network Fundraising Guide
  – www.rivernetwork.org/fundraisingguide

• Volunteer Monitor
  – http://www.epa.gov/owow/monitoring/volunteer/issues.htm

• DNR Grants
  – http://watermonitoring.uwex.edu/level2/funding.html

• EPA Watershed Funding
  – http://www.epa.gov/owow/funding.html
Acknowledgements

Thanks to:
- Wendy Wilson, River Network
- The team at Tetra Tech and
- The staff of the U.S. EPA Sustainable Finance Team.
### Steps in Putting Together a Fundraising Plan

**Step 1:** Review fundraising history.

<table>
<thead>
<tr>
<th></th>
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</tr>
</thead>
<tbody>
<tr>
<td>1. Renewals</td>
<td>$7,190</td>
<td>$5,135</td>
<td>$7,245</td>
<td>$8,500</td>
</tr>
<tr>
<td>2. Major Donors</td>
<td>$4,870</td>
<td>$6,585</td>
<td>$7,000</td>
<td>$8,500</td>
</tr>
<tr>
<td>2A. Memorial Gifts</td>
<td></td>
<td>$5,663</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3. New Member Acquisition</td>
<td>$1,320</td>
<td>$1,870</td>
<td>$435</td>
<td>$2,500</td>
</tr>
<tr>
<td>4. Year-end Appeal</td>
<td>$7,245</td>
<td>$4,955</td>
<td>$8,720</td>
<td>$9,000</td>
</tr>
</tbody>
</table>
Step 2: Review/analyze past strategies and brainstorm new ones.

- Board
- Staff
- Volunteers
Strategies to consider for this year

- New Members
- Member Renewals
- Special Appeals
- Major Donor Program (including board)
- Events
- Corporate Grants and Sponsorships
- Foundation Grants
- Government Grants
Step 3: Survey your human fundraising assets.

- Categories of assets:
  - Institutions/Groups (government agencies, banks, schools, civic organizations)
  - Individuals (volunteers, board members, politicians, scientists)

- Specific groups or individuals with a relationship to your organization
- Each group or individual has assets that can be used to achieve success
Consider what each asset can bring to the fundraising strategy

- **Holiday membership campaign**
  - **Existing membership**
    - Buy memberships for friends, family, colleagues as holiday gifts
  - **Print shop owner on Board**
    - Free printing of holiday solicitation card
  - **High school interns**
    - Track new memberships in database and send out gift announcements
  - **Neighborhood organizations, places of worship**
    - Publicize campaign to members and congregations
### Step 4: Select fundraising strategies and goals for the current year.

<table>
<thead>
<tr>
<th>Strategy</th>
<th>2006 Budget Goal</th>
<th>Other Goals</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Members</td>
<td>$5,000</td>
<td>100 new members</td>
</tr>
<tr>
<td>Renewals</td>
<td>$10,000</td>
<td>60% renewal rate</td>
</tr>
<tr>
<td>Special Appeal</td>
<td>$4,000</td>
<td>Generate 5 new $100 donors</td>
</tr>
<tr>
<td>Foundations</td>
<td>$18,200</td>
<td>Add 2 new foundations</td>
</tr>
<tr>
<td></td>
<td>$37,200</td>
<td></td>
</tr>
</tbody>
</table>
For Each Strategy: Decide

1. Goals
2. Activities
3. Responsible Person
4. When?
5. How much?
### Step 5: Flesh out your plan.

<table>
<thead>
<tr>
<th>Foundation</th>
<th>Amount</th>
<th>Project</th>
<th>% Chance</th>
<th>Forecast</th>
</tr>
</thead>
<tbody>
<tr>
<td>ABC Fund</td>
<td>$10,000</td>
<td>Lawsuit</td>
<td>50%</td>
<td>$5,000</td>
</tr>
<tr>
<td>River Foundation</td>
<td>$4,000</td>
<td>Membership Drive</td>
<td>80%</td>
<td>$3,200</td>
</tr>
<tr>
<td>Watershed Trust</td>
<td>$15,000</td>
<td>General Operating</td>
<td>50%</td>
<td>$7,500</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Support</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Black Family Fund</td>
<td>$25,000</td>
<td>Training Program</td>
<td>10%</td>
<td>$2,500</td>
</tr>
<tr>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td><strong>Total Forecast</strong></td>
<td></td>
<td></td>
<td></td>
<td><strong>$18,200</strong></td>
</tr>
</tbody>
</table>
Step 6: Get input and approval of the plan from board, staff, and volunteers.
Step 7: Prepare a fundraising calendar.

<table>
<thead>
<tr>
<th>Strategy</th>
<th>Jan</th>
<th>Feb</th>
<th>Mar</th>
<th>Apr</th>
<th>May</th>
<th>Jun</th>
<th>Jul</th>
<th>Aug</th>
<th>Sep</th>
<th>Oct</th>
<th>Nov</th>
<th>Dec</th>
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</thead>
<tbody>
<tr>
<td>Foundations</td>
<td>X</td>
<td></td>
<td></td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td>X</td>
<td>X</td>
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<tr>
<td>Major Donors</td>
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<td></td>
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<td>Summer Event</td>
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<td></td>
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<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>New Members</td>
<td>X</td>
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<td>X</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Renewals</td>
<td></td>
<td></td>
<td>X</td>
<td>X</td>
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<td></td>
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<td>X</td>
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<tr>
<td>Holiday Appeal</td>
<td></td>
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<td></td>
<td>X</td>
<td></td>
<td>X</td>
<td>X</td>
<td>X</td>
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<tr>
<td>Newsletter</td>
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<td></td>
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</tr>
</tbody>
</table>
Step 8: Integrate fundraising into your organizational calendar.
### Step 9: Evaluate, Evaluate, Evaluate!

#### Evaluation Chart

<table>
<thead>
<tr>
<th>Strategy</th>
<th>Number of Prospects Asked</th>
<th>Response: Percent and Number</th>
<th>Amount Raised (Gross and Net)</th>
<th>Who Participated and How Many</th>
<th>What Worked and What Didn’t (Did We Accomplish Our Goals?)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Direct Mail to New Prospects (Acquisition)</td>
<td>2 mailings: total of 5,000 letters sent</td>
<td>1.2%, 60 new donors</td>
<td>Gross: $2,100 (average gift: $35) Expenses: $3,000 Net: -$900</td>
<td>Development associate, with assistance from executive director</td>
<td>The rate of response was within the range we expected (1-2%), although we hoped to get closer to 2%. We planned this strategy as an investment, as a way to bring in new donors, so we didn’t expect to have a net profit at this point.</td>
</tr>
<tr>
<td>Mail Appeals to Current Donors</td>
<td>500 donors (giving less than $250), each asked twice during year</td>
<td>55% on renewal letter; 15% on special appeal</td>
<td>Gross: $18,000 Expenses: $750 Net: $17,250</td>
<td>Staff – 2 Board – 5 helped with mailing</td>
<td>The first time board members added personal notes to some of the letters. Hopefully they will get more comfortable doing phone calls and donor visits in the next campaign.</td>
</tr>
<tr>
<td>Phone Solicitations to Current Donors &amp; Qualified New Prospects (to ask for gifts between $100 and $250)</td>
<td>100 donors who give between $100 and $250 were called as a follow-up to personalized letters</td>
<td>Reached 30, left messages with 50 others; a total of 40 sent in a contribution</td>
<td>Gross: $7,200 Expenses: None (beyond phoning costs and staff time)</td>
<td>Ran it as a phone bank over several evenings: 3 staff, 2 board members &amp; 2 volunteers participated</td>
<td>It’s always hard to reach people by phone, so we always do this one over several nights. The first year we only reached 15% of our donors; by adding several nights, we’ve gradually increased the total number reached. We have received more gifts at higher amounts than with just a letter.</td>
</tr>
<tr>
<td>Personal Asks for Major Gifts ($250 &amp; Up)</td>
<td>65 (40 were current donors, some at less than $250, 25 were new prospects)</td>
<td>30 gave $250 or more; 8 gave less than $250</td>
<td>Gross: $25,000 Expenses: $500 (for some meals, local travel &amp; long distance calls) Net: $24,500</td>
<td>ED and DD did most of the asks, 2 board members participated and one of them brought in a $5,000 gift.</td>
<td>Still working on getting more board members and other volunteers to work on major donor campaign. Too many of the donors have a relationship only with the executive director.</td>
</tr>
<tr>
<td>Special Events’ Annual Dinner</td>
<td>750 invitations sent to current and prospective donors</td>
<td>200 people attended event</td>
<td>Gross: $12,700 Expenses: $7,200 Net: $5,500</td>
<td>Dinner committee &amp; volunteers, 2 board members</td>
<td>We had hoped to get 250 people to the dinner and our goal was 100. We...</td>
</tr>
</tbody>
</table>