



Workshop: Coaching Fully-Funded Staff to Stay Fully-Funded
Presenter: Sarah Strickland, Fundraising Coaching Director, Youth Dynamics

Big Idea: The habits we start with are the habits we stay with.

Transition - Transitioning staff from initial fundraising to maintaining and growing their support team while in their ministry position

- We want to pass them off well to their ministry supervisor.
- Continue to meet with your new staff person over their 1st year in their ministry position.

What is one thing you are going to do to help your staff transition to their ministry position?

Time - Building the habit of regularly spending time working on support

-“You do not rise to the level of your goals. You fall to the level of your systems.” (James Clear, Atomic Habits page 27)

- Scheduling support time
- Consider different scheduling options
- Scheduling tips
- Support trips

What have you found to be the most helpful in coaching your staff to spend time on support?



Training - Teaching ongoing communication, fundraising, and admin tasks

Training - Communication

-Mass Communication

+E-Newsletters

+Paper Newsletters

-Personal Communication

+Thank you notes

+Prayer cards

+Postcards/Cards

+Gifts

-Prayer

What is your favorite way to communicate with your donors?

Training - Raising Funds

-Annual Donors

-Lapsed Donors (The Disappearing Donor by Dr E. Dale Berkey)

-Raising new funds

What is your best piece of advice for veteran staff raising new funds?

Training - Admin

-Have a good system and update it regularly

What are the three most important things to know about each of your donors?



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Training Outline for 6 lessons to take fully-funded staff through during their first year.

Lesson 1 - Support time, organizational tools, and policies

Support time:

- What percent of your work time should be spent on support
- Work with your supervisor to schedule this at the beginning of each month
- Guard that time
- 3 Categories of support work:
 - 1 - Communication & Cultivation: mass and personal communications
 - 2 - Raising funds: new donors, special projects, increases, annual donors
 - 3 - Administrative: checking giving patterns, updating contact info, notes
- Use the last 10-15 min to plan tasks or the focus of the next support session

Organizational tools and policies:

- Tools, procedures, and support policies for your organization

Lesson 2 - Communication and Cultivation

Cultivation Principles:

- Depending on the character of God, realizing that He, the faithful One, provides for our financial support
- Viewing team members as friends rather than as financial investors
- Endeavoring to be open and personal with your team
- Seeking to be generous with your time and money to cultivate your support team

Mass Communications:

- Paper Newsletters
 - +Recommended to do at least 1 per year to catch address changes
 - +1 sheet of paper, 1-2 Stories, Prayer Requests, 2-4 Pictures
- E-Newsletters
 - +Use e-newsletter service with unsubscribe button
 - +Monthly is a good rhythm
 - +Check how it looks on mobile before sending
 - +1 story, prayer requests, 1-2 pictures

Personal Communications:

- Thank you notes:
 - +New donor
 - +Increase donor
 - +Special gift
 - +When a donor leaves (thank them for the difference they have made)
- Thank you calls:
 - +Call everyone who has donated in the past year to say thank you
 - +Ask how you can pray for them
 - +Be ready with a ministry story when they ask, "How are things going?"
 - +Leave a nice thank you message if they don't answer
- Cards / Postcards / Gifts



Lesson 2 - Communication and Cultivation (cont.)

Prayer

- Spending time praying for donors is support work
- Work into your plan a way to regularly pray for all your donors by name
 - +Daily, Weekly, Monthly, Quarterly

Lesson 3 - Lapsed Donors

Information/Statistics from The Disappearing Donor by Dr. E. Dale Berkey

Types of Lapsed Donors:

- 1 - Idle: still considers the ministry to be an important priority in their life, and still considers themselves a supporter of the ministry (over 50%)
- 2 - Intentional: no longer considers the ministry to be a priority and no longer considers themselves a supporter of the ministry (12%)
- 3 - In-betweener: still considers the ministry to be an important priority in their life, but does not consider themselves a current supporter of the ministry (over 26%)

Note: Typically, a lapsed donor will ½ the amount of time since their last gift (example: it's been 8 months, they think 4 months)

Why they say they lapse:

- 40% - needs of local church increase
- 20+% - income loss
- 18% - job loss
- 14% - expense increase

What's going on under the surface:

-Three of the most common MIQ's (Most Important Qualities) that donors look for in organizations they support:

- 1 - being honest in business practices
- 2 - using donations only in the way they said they would be
- 3 - a quality personal relationship with the ministry

-67+% will quit giving, and 13+% will decrease giving because of a perceived MIQ failure

What to do when a donor lapses

- Contact and find out which group and respond accordingly:
 - +Idle – get back started
 - +Intentional – listen to concerns, address if you can, check to see if they want to stay on mailing list, check to see if you can ever check back in w/ them
 - +In-between – listen to concerns, address if you can, check to see if they want to start again, or when you can check back in

How to prevent lapsed donors:

- Say thank you!
- Share the impact they are making through their partnership
- Avoid emergency appeals (communicates bad stewardship)
- Reinforce organizational credibility when communicating



Lesson 4 - Raising New Support

Plan on raising new funds every year.

- Lost donors / Increased expenses (raise!)
- Work it into the annual plan every year
- “The best time to raise funds is when you don't need it.”

Continuing to build your support team:

- 1 - Know your current fundraising goal
- 2 - Update your presentation
- 3 - Create a list
 - +Lapsed Donors
 - +Current donor increase asks
 - +Past special gifts
 - +Past “no, but you can check in later”
 - +People on your mailing list whom you have never asked
 - +New contacts
 - +Referrals
- 4 - Set up appointment (either face-to-face or virtual), ask, follow up, and thank

Annual Donors

- Call to check in and see if they can give again
- Secure donation method and needed materials (envelope, giving link, etc.)

Increasing your Mailing List

- Always be asking folks if they want to join your mailing list
 - +Social Media
 - +Church / bible study
 - +Places you volunteer
 - +Volunteers with your organization
 - +Reunions / Weddings / etc.

Lesson 5 - Support Trips

Be strategic about when you go

- Ministry schedule
- Around an event (wedding, reunion, etc.)
- Be careful around holidays (extra time before or after)

Plan and schedule ahead of time

- Current donors (major first) – update/increase asks
- Potential new donors – ask
- Networking – join mailing list
- Group presentations: church, small group, etc.
 - +Collect contact info – follow up individually
- Include some downtime and extra time for spontaneous appointments

Return Work

- Thank yous!
- Additions to mailing list
- Follow up w/ asks



Lesson 6 - Annual Fundraising Evaluation

As you go through the year, evaluate your fundraising/stewardship plan and make notes for next year

Evaluate those things within your control

Make reasonable changes during the year and for next year

Annual Evaluation Questions:

- 1 - How many newsletters (paper and electronic) did I send out this year?
- 2 - How did I show appreciation and thank my donors this year?
- 3 - How often did I pray for my donors by name?
- 4 - Who are my major donors? How many personal communications did I do with each of them this year?
- 5 - What personal communications did I do with regular donors this year?
- 6 - How many face-to-face asks did I make to people this year for new or increased support?
- 7 - What has my support level been each month this past year, and why?
- 8 - How much support time did I spend each month?
- 9 - What went really well this past year in fundraising?
- 10 - What 1 area do I want to improve on for this next year in fundraising?