



Fundraising 201: Going Beyond the Banquet

**Northeast Regional Rendezvous
June 2, 2019**

Agenda

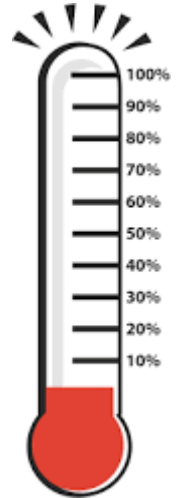
- 1. Donor Characteristics and Traits**
- 2. Fundraising Options for Chapters and Councils**
- 3. Building a Strategic Approach to Fundraising**
- 4. Coordinating and Maximizing TU's Potential**
- 5. Discussion and Questions**



Fundraising Options for Chapters and Councils



- Individual Gifts
- The TU Fundraising Program (Tackle Box)
- Banquets
- Non-traditional Fundraising Ideas (Social Media)
- Rebates
- Embrace A Stream
- Foundations, Corporate, State and Federal Programs



Charitable Giving in the US



In 2016, **INDIVIDUAL DONORS** drove the rise in philanthropic giving
And for only the sixth time in 40 years, all nine major philanthropy
subsectors realized giving increases

\$390.05 billion

Where did the generosity come from?

Giving by Individuals
\$281.86 billion
↑ 39% 72%
increased 3.0 percent (2.6 percent when inflation-adjusted) over 2015

Giving by Foundations
\$59.28 billion
↑ 35% 15%
was 3.5 percent (2.2 percent when inflation-adjusted) over 2015

Giving by Bequest
\$30.36 billion
↓ 9.0% 8%
declined 9.0 percent (10.1 percent when inflation-adjusted) over 2015

Giving by Corporations
\$18.55 billion
↑ 35% 5%
increased 3.5 percent (2.3 percent when inflation-adjusted) over 2015

Contributions by source
(by percentage of the total)

The single largest contributor to the growth in total giving was an increase of \$10.53 billion in **GIVING BY INDIVIDUALS**—offsetting declines from bequest giving.

Visit www.GivingUSA.org to learn more and to order your copy of *Giving USA 2017: The Annual Report on Philanthropy for the Year 2016*.

* All figures on this infographic are reported in current dollars unless otherwise noted.



Giving to international affairs comprised a larger percentage of total charitable giving in the United States, increasing from 4 percent to 6 percent in 2016.



Giving to environment/animals increased 7.2 percent in 2016, the largest gain of any subsector, outpacing growth in overall giving for the last two years.

Where are all of the charitable dollars going?

(as a percentage of the total)



Each charitable subsector grew in 2016 except for giving to Individuals. Growth rates ranged from approximately 3-7 percent.

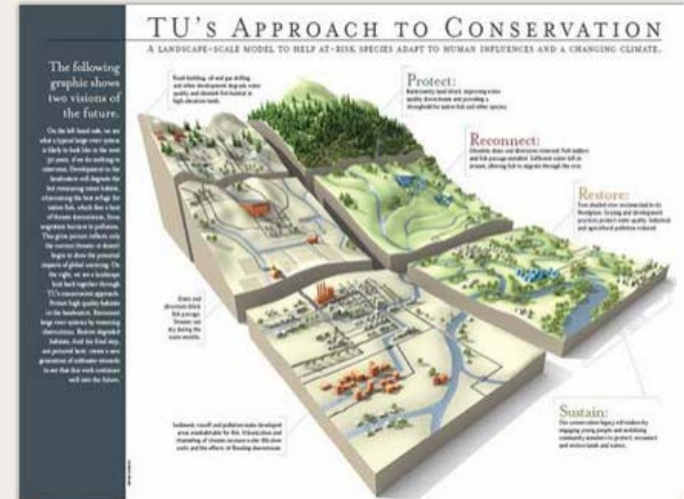
Giving USA Foundation[®], The Giving Institute, and the Indiana University Lilly Family School of Philanthropy are pleased to continue their partnership in providing the most comprehensive, longest-running, and most rigorously researched resource on U.S. charitable giving. *Giving USA: The Annual Report on Philanthropy*. It is a privilege to report on Americans' generosity and related historical trends on U.S. charitable giving.



Strategic Planning Leads to Success

- 👉 Develop a Plan with Clear Goals & Measurable Outcomes
- 👉 Define Projects to Achieve Those Goals Over a Set Period
- 👉 Create A Budget to Fund Those Projects and Meet Those Goals
- 👉 Build Your Case
- 👉 Seek Funding

Strategic Planning Resources



STRATEGIC PLANNING DOCUMENTS

[TU National Strategic Plan - 2015-2020 - PDF](#)

[Strategic Planning Template for Chapters - PDF](#)

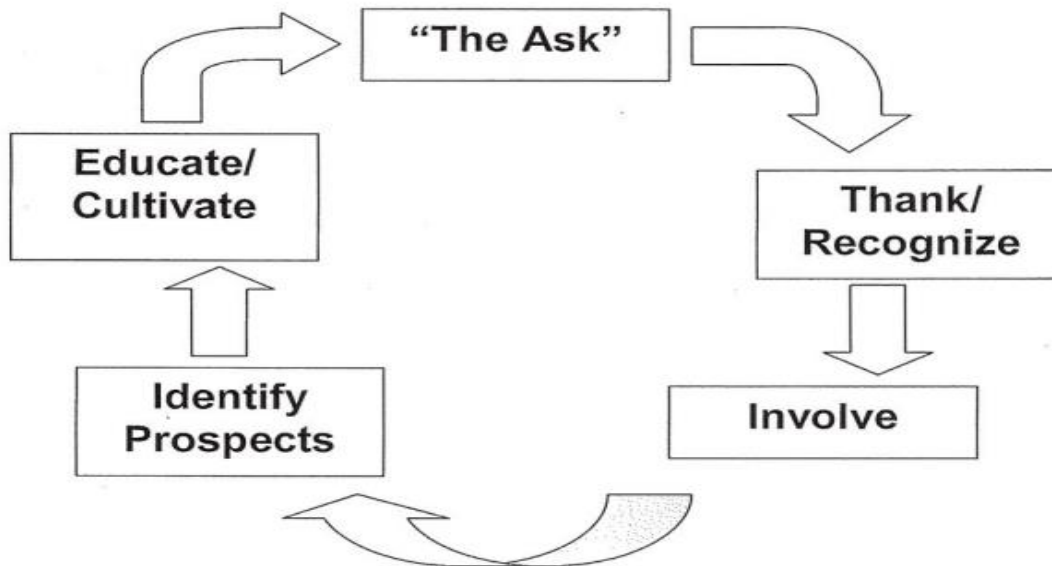
[Sample Chapter Strategic Planning Document - PDF](#)

Four Needs of Individual Donor Fundraising



Cycle of Fundraising

1. Case
2. Prospects
3. Ask
4. Systems



Involvement at any point in this cycle is part of fundraising,
and involvement at every point is needed!

The ABC's of Donor Prospects



If people meet these three criteria they are “prospects” and should be asked to contribute (or perhaps to contribute more).

Ability: Do they have any money to give?

Belief: Do they care about your issues, programs, constituency, etc?

Contact: Do they have a relationship with any of your board members, staff, donors, or key volunteers?

Are they already contributing money, time, or both?

10 Important Facts for Individual Donor Fundraising



1. If You Want Money - You Have To Ask For It

- Most people will not think to give you money unless you make your needs known.

2. Thank Before You Bank

- Write a thank you note *before* you bank a donation you have received.

3. Donors Are Not ATM's

- Stay connected with donors other than when you are requesting donations (newsletters, event invitations, etc.).

www.newlevelgroup.com

4. Most Money Comes From People... and Most of Those People Are Not Rich

- Seven out of ten adults give money.

5. People Have the Right To Say No

- People say no for all kinds of reasons; rarely does their refusal have anything to do with you or your group.
- If you don't hear 'no' several times a week, you are not asking enough people!

10 Important Facts for Individual Donor Fundraising



6. To Be Good at Fundraising, Cultivate Three Traits

- A belief in the cause for which you are raising money.
- The ability to have high hopes and low expectations.
- Faith in the basic goodness of people.

7. Fundraising Should Not Be Confused with Fund Chasing, Fund Squeezing, or Fund Hoarding

- Don't chase funds that do not support your mission.
- Fund squeezing is “How can we cut back on spending?”
- Fund hoarding is “Where can we get even more money?”
- Fundraising should have a plan on why it is being saved.

www.newlevelgroup.com

10 Important Facts for Individual Donor Fundraising



8. Fundraising Is An Exchange – People Pay You To Do Work They Cannot Do Alone

- Fundraising is *not* begging; begging is when you ask for something you do not deserve.
- If you are doing good work, then you deserve to raise money to do it.

9. People's Anxieties About Fundraising Stem From Their Anxieties About Money

- Change attitude about fundraising success to how many people you ask rather than how much money you raised.
- Keep focused on your commitment to the cause.

www.newlevelgroup.com

10. There Are Four Steps to Fundraising – Plan, Plan, Plan, and Work Your Plan

- Fundraising is three parts planning to one part of doing.
- Start defining the end result you want and when you want it to happen.
- Start backwards from the end result desired to the present and plan accordingly.

Fundraising Trends

- Annual donations and giving:
 - 84% of Millennials donate an average of \$481
 - 59% of Generation X donate an average \$732
 - 72% of Baby Boomers donate an average \$1,212
- Monthly donors give 46% more in one year than those who give one time
- 66% of donors have volunteered within the last 12 months...85% donated to the non-profit where they volunteered.
- Research successful fundraising ideas at:
www.TheFundraisingAuthority.com



VolOps Resources: Online Tools



Important Fundraising Resources, Guides & Documents

- [Fundraising Event Insurance](#)
- [TU Guide to Fundraising](#)
- [TU Banquet Guide & Planner](#)
- [TU Embrace A Stream Grant Program](#)
- [Online Event Registration](#)
- [TU Event Printshop](#)
- [TU Donor Acknowledgement Letter Template](#)

[WWW.TU.ORG/FUNDRAISING](http://www.tu.org/fundraising)

TU Fundraising Program

- Abel Reels
- Arborwear Apparel
- Big Sky Carvers
- Costa Del Mar
- Jenlis, Inc.
- Orvis
- River Traditions
- R.L. Winston Rod Company & Bauer Reels
- Ross Reels
- Scientific Anglers
- Temple Fork Outfitters
- Thomas Bates Custom Belts
- Waterworks / Lamson Reels
- Wild Rivers Press
- Yeti Coolers

Banquet Guide and Planner



Trout Unlimited Banquet Guide and Planner

PURPOSE OF A TROUT UNLIMITED EVENT:

- **CONSERVATION FUNDRAISING** - To raise money for local, state and/or national Trout Unlimited programs which help conserve, protect and restore coldwater fisheries and their watersheds.
- **ENTERTAINMENT** - To develop an event that will be enjoyed by all in attendance-anglers, non-anglers, male and female.
- **PUBLIC RELATIONS** - To promote Trout Unlimited's image within our local communities as a serious, capable, action oriented conservation organization.
- **MEMBERSHIP** - To recruit new members into Trout Unlimited.
- **LEADERSHIP DEVELOPMENT** - To attract and train new Trout Unlimited volunteers and leaders.

A SUMMARY OF HOW TO ORGANIZE A TU EVENT/BANQUET:

A well-coordinated committee of four to six active members/volunteers is the key to a successful event or banquet. In summary, the steps involved in organizing and staging an event/banquet are as follows:

1. Committee meets:
 - a. Elects Event/Banquet Chair
 - b. Determine type of Event, Approximate Date
2. Chair names and appoints sub committees/ chairs. These could include:
 - a. Treasurer
 - b. Arrangements
 - c. Publicity
 - d. Auction & Prize
 - e. Ticket & Membership
3. Arrangements sub-committee meets:
 - a. Selects place/location of event
 - b. Negotiates contract for all costs of event (meal, etc.)
4. Committee meets:
 - a. Updated by arrangements sub-committee on place and cost
 - b. Sets date and price of ticket
5. Treasurer:
 - a. Handles finances and accounting for event
6. Ticket & membership sub-committee meets:
 - a. Prints tickets, distributes to committee members and sells tickets
 - b. Prepares invitation letter for mailing
7. Publicity sub-committee meets:
 - a. Organizes a campaign for advertising (bulk e-mail, radio, TV, newspapers)
8. Auction and prize sub-committee meets:
 - a. Solicits prizes and auction items
 - b. Orders from the [Trout Unlimited Fundraising Program in the Tacklebox](#)
9. Banquet is held:
 - a. Full committee and sub-committees coordinate to cover all event/banquet operations
10. Wrap up meeting is held:

Creative Fundraising Ideas



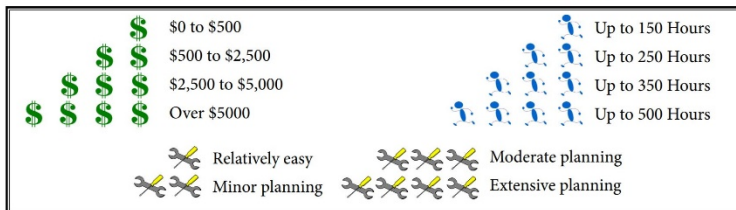
- Consider approaching the Fly Fishing Film Tour
- Host a one-fly tournament or a casting competition
- Establish a relationship with a brewery and/or winery
- Develop an online store for council/chapter for logo gear
- Tie flies at TU meetings and raffle monthly
- Commission an artist to paint a limited edition trout and sell the prints and auction the original painting
- Research the viability of vehicle license plate revenue sharing programs
- Share trips between different councils and chapters – i.e. the PA council donates a trip to the NY council and the NY Council donates a trip in return



Chapter & Council Fundraising Ideas, Events & Activities

Provided by TU Grassroots Fundraising Work Group
www.tu.org (Tackle Box)

The following fundraising ideas were gathered by the grassroots Work Group on fundraising from Trout Unlimited chapters and councils from across the country. Broken into the categories of Events, Food, Gear, Raffles, Trips, Grants and General, the following list provides an at a glance resource for TU volunteers looking to increase their chapter or council's fundraising success or effectiveness. Along with the ideas and states where they have been successful, the legend describes the ranking system for each idea's potential to raise funds; volunteer time requirements; technical and logistical difficulty



Events

Fishing / One Fly Tournament (UT, WY, RI)

One Fly or other types of fishing tournaments promote the sport, attract new members and raise money from entrance fees, business sponsorships and donations at the event.



Fly Fishing School or Class

Fly fishing schools or classes promote the sport, attract new members - including families and youth - and raise money from entrance fees and business sponsorships.



Film Screening

Film screenings - such as the Fly Fishing Film Tour and others - attract new members and raise money from ticket sales and business sponsorships. (Potential for a raffle at event.)



Casting Competition

A casting competition can attract new members and raise money from entrance fees and business sponsorships. (Potential for a raffle at the event.)



Business and Other Partnerships

1% for Rivers (the Planet)

(CO, NH)

Partner with local businesses to donate 1% of sales - either for the year, forever, or for a short period of time, to TU conservation programs.



Rod Raffle

(MA)

Partner with a bank or other community business to purchase a rod/reel engraved and displayed at the business promoting TU. Rod/reel auctioned/raffled off.



Matching Funds

Request matching fund donations from area businesses.



Trout Camp

Ask local businesses to sponsor kids going to trout camps.



New Member Rebate



TROUT UNLIMITED
MEMBERSHIP
APPLICATION

TROUT UNLIMITED
THANK YOU FOR JOINING
TROUT UNLIMITED.

TROUT UNLIMITED

Fundraising and Social Media



- Donors are 39% more likely to give on responsive websites
- Email fundraising accounts for 26% of all revenue raised online in 2017
- 30% of online giving occurs in December...10% in the last 3 days of the year
- #GivingTuesday in 2018 raised \$380 million (45% more than 2017);
4+ million gifts at average of \$105
- 21% of online donations occur on mobile devices
- Facebook, LinkedIn and Pinterest are the most regularly accessed networks

DECEMBER 2019

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

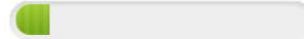
Source: www.nptechforgood.com

Help Teens be Conservation Leaders!



MISSOULA, MT

\$590 of \$5,700



Raised by 7 people in 13 days

Donate Now

Certified Charity [Learn More](#)

Trout Unlimited Inc
Arlington, VA
Tax ID: 381612715



Created March 11, 2016
✉ Tara Granke TU

7 DONATIONS

RECENT ▼

136 SHARES



We're a non-profit that needs your help to empower and support the next generation of conservationists.

- Many online donors can be generous crowd funders:

<u>% of Contributions</u>	<u>Age of Funders</u>
9%	18 - 34
19%	35 - 44
22%	45 - 54
24%	55 - 64
18%	65 - 74
7%	75+

Grant Options for Chapters and Councils

- Embrace-a-Stream
- Foundations
- Corporate
- State and Federal Programs
- State Game and Fish Departments



Embrace-a-Stream



- EAS is the flagship program for funding TU's grassroots conservation efforts
- 2018 grant cycle: \$123,000 awarded to 29 chapters and councils with an average grant award of \$4,242
- Since 1975 \$1.75 million in grants funded 1,080 projects in 19 states
- EAS continues to restore stream habitat, improve fish passage and protect water quality from coast to coast

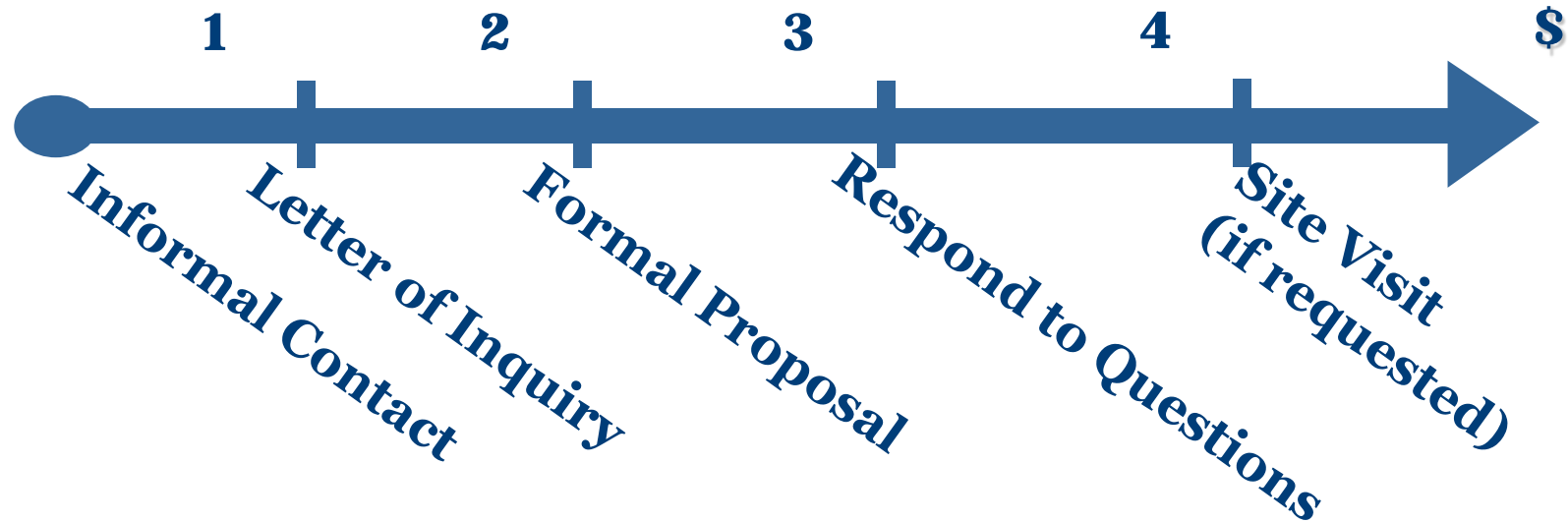


Embrace-a-Stream



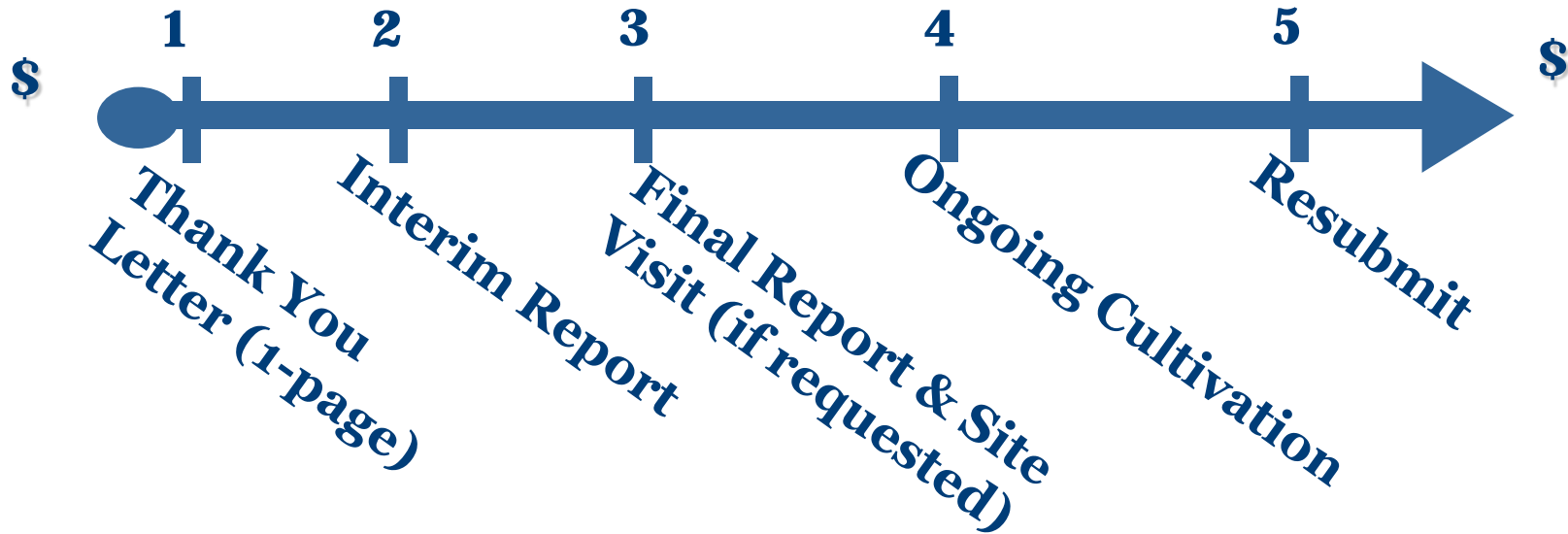
- Potential funding for your chapter up to \$10,000 per project
- Great way to pursue conservation, encourage member and community engagement, grow your chapter, connect with likeminded groups
- Get creative! Even nontraditional projects can be an EAS opportunity

Foundations: A Process



- Process may take as long as 6 to 18 months to complete.
- Personal/ existing relationship with a foundation provides for a much more efficient process & increased likelihood of success.

Foundation Process: Post Grant



Engage foundation personnel to discuss next phase opportunities. Invite them on a site visit. Notify them of any major changes to the project.

Tools for Finding Foundations



To Find Community Foundations in your region: www.cof.org/locator

Foundation Center: www.foundationcenter.org

“Cooperating Collections” are free funding information centers in libraries, community foundations, and other nonprofit resource centers that provide a core collection of Foundation Center publications and a variety of supplementary materials and services in areas useful to grant seekers.

Once in the database, you can search by:

- Geographic area
- Area of interest (what type of organizations they make grants)
- Trustee/Director info (Do you know them? If so, you may have an “in”).
- Application deadlines and requirements
- And much, much more

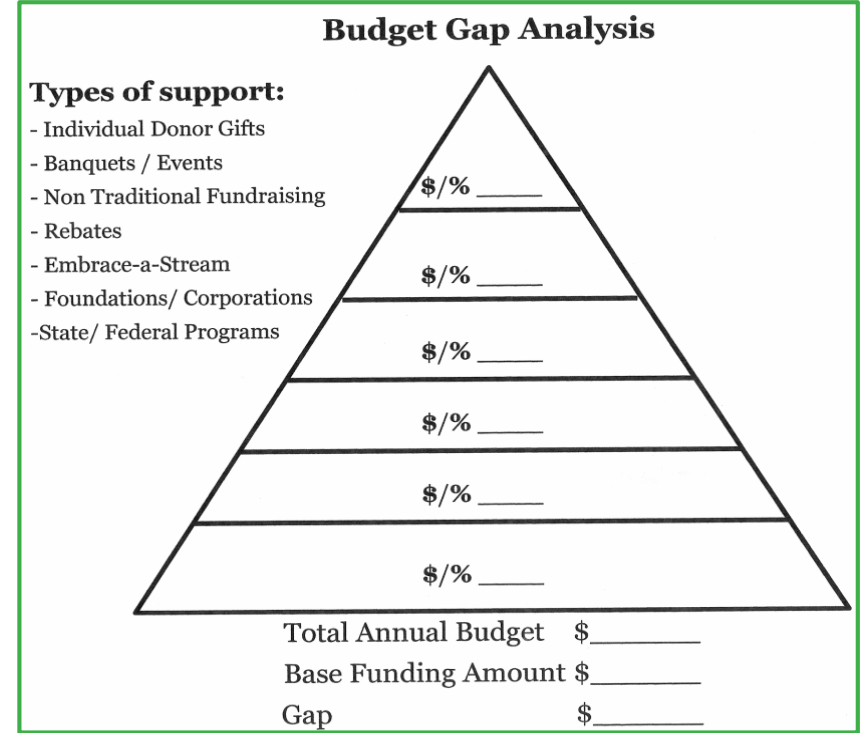
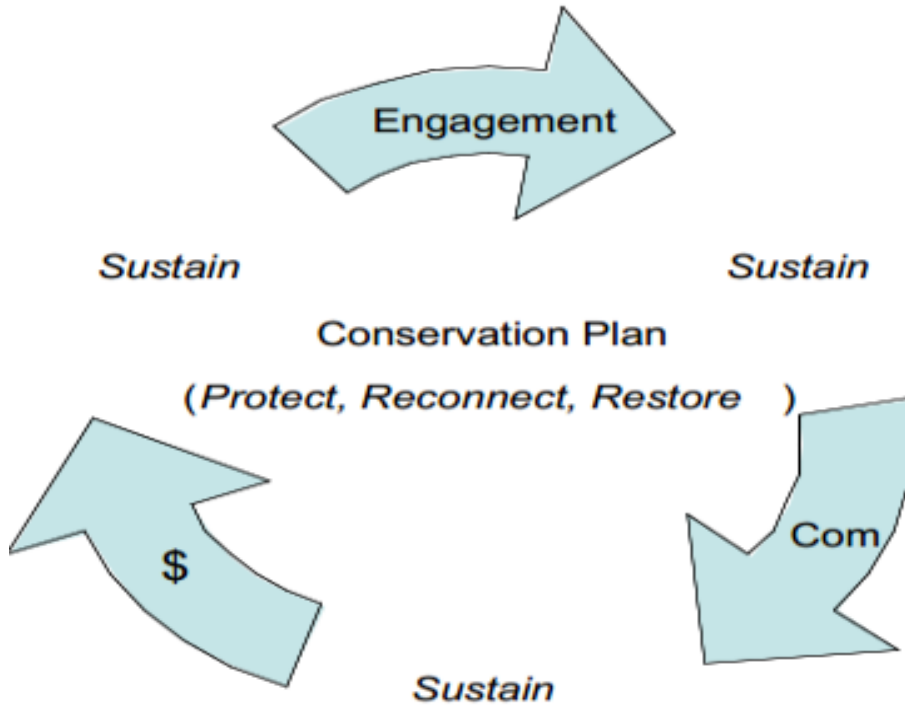
State / Federal Programs



- Funding source for on-the-ground projects
- Be aware of match requirements and accounting hurdles
- Contact TU staff for more information before pursuing funding from these programs
- Demands significant ongoing management and communication which require full time staff support



Building A Strategic Approach to Funding



Funding Strategic Plan: “Example”



This funding plan sets out strategies and goals for securing “unrestricted” funding to meet the Conservation, Communications and Engagement plan goals of the chapter (or council.)

Goal: Increase overall revenue from \$x,xxx (2019) to \$xx,xxx (2020)

Strategies: Primary support will come from the following sources:

- **Direct mail / email / web:** Send end of year appeal to members. Create new “Donate” page on chapter (or council) website.
- **Events:** Use annual banquet and new non-traditional events to raise revenues, expand the high-dollar donor base and recognize supporters.
- **Donor Relationships:** Increase communication and engagement with donors on activities and programs benefiting our mission.
- **Online Fundraising:** Initiate use of new online techniques (i.e. Giving Tuesday and Go Fund Me).

Funding Strategic Plan: “Example”



This funding plan sets out strategies and goals for securing “unrestricted” funding to meet the Conservation, Communications, and Engagement plan goals of the chapter (or council.)

Goal: Increase overall revenue from \$x,xxx (2019) to \$xx,xxx (2022)

Strategies: Primary support will come from individuals (including events.) Those donors will come from the following sources:

- **Direct mail/email/web.** Send end of year appeal to members. Create new “donate” page on chapter (or council website.)
- **Events.** Use annual banquet and new, non-traditional events to raise revenues, expand the high-dollar donor base, and recognize supporters.
- **Support leveraged from projects.** Dovetail fundraising around chapter (or council) projects, especially where projects have given the chapter (or council) heightened credibility in an area.
- **Achieve 100% participation** from fly fishing guides and outfitters in our area.

Funding Strategic Plan: “Example”



Goal: Increase temporarily “restricted” funding from \$k (2019) to \$kk (2023) to support the chapter (or council) project.

Strategies: Design and implement a comprehensive campaign that defines and facilitates a five-year fundraising effort to meet the chapter (or council’s) funding needs for projects and programs.

Identify and solicit:

- **Foundations:** To the extent possible, work with local staff research and draft any grant requests.
- **Corporations:** Identify and solicit local corporate partners that can support the chapter (or council) and its programs and help increase public awareness about TU.
- **State and Federal Programs:** Work with TU national staff to determine if a federal-level grant might be appropriate for our xyz project and if so pursue in conjunction with staff. Work with local staff and the state council to identify relevant state funding options and pursue accordingly.

Coordination: Maximizing TU's Fundraising Potential



- Communication between TU staff and grassroots is essential to avoiding conflicts.
- Without collaboration TU will look disorganized and will diminish our chances of being funded.
- Maximize “One TU”!
- Remember your partners. Your chapter or council doesn't always need to be the entity that directly receives the funds. Often your partner organizations may be better suited to receive the funding and put it towards your shared project.

Fundraising Resources



- **TU Tacklebox**
 - Fundraising for Chapters and Councils
 - Strategic Planning Resources
- **Fundraising Newsletters & Resources**
 - The Funding Authority (www.thefundingauthority.com)
 - Nonprofit Tech for Good (www.nptechforgood.com)
 - Google: Fundraising Ideas
- **Online Fundraising**
 - Giving Tuesday (www.givingtuesday.org)
 - Go Fund Me (www.gofundme.com)
 - Crowd Funding (www.causevox.com)
 - Amazon Smile (www.amazonmile.com)



Follow-up with us at:

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