

MORE THAN MAILERS: 2 PROVEN PRACTICES TO GROW YOUR ANNUAL FUND

Groundbreaking Fundraising Solutions for Nonprofits

Pamela H. Witter, BA, MBA, CFRE
Author, Administrator, Consultant

www.BeASeedPlanter.org
BeASeedPlanter@Outlook.com
LINKEDIN: Pamela Witter



THE FIVE STRATEGIES

1. PERFECTING MESSAGING
2. UTILIZING DATA
3. PERSONALIZING MASS COMMUNICATION
4. APPLYING THE MAJOR GIFT MODEL
5. CUSTOMIZING BEST PRACTICES

BONUS: LEADERSHIP IN DEVELOPMENT (THE “T.I.M. PRINCIPLE”)



FIVE STRATEGIES TO INCREASE
ANNUAL FUND
REVENUE

GROUNDBREAKING FUNDRAISING SOLUTIONS FOR NONPROFITS

Pamela H. Witter, MBA
www.BeASeedPlanter.com
BeASeedPlanter@outlook.com



2 PROVEN PRACTICES WITHIN STEP FOUR: APPLYING THE MAJOR GIFT MODEL

1. The 7 essential elements of a great annual fund plan
2. Making the annual fund ASK
 - a. A 4-step process for high-end annual fund asks
 - b. In-the-trenches insights to overcome the fear of asking



FIVE STRATEGIES TO INCREASE
**ANNUAL FUND
REVENUE**
GROUNDREAKING FUNDRAISING SOLUTIONS FOR NONPROFITS

Pamela H. Witter, MBA
www.BeASeedPlanter.com
BeASeedPlanter@outlook.com



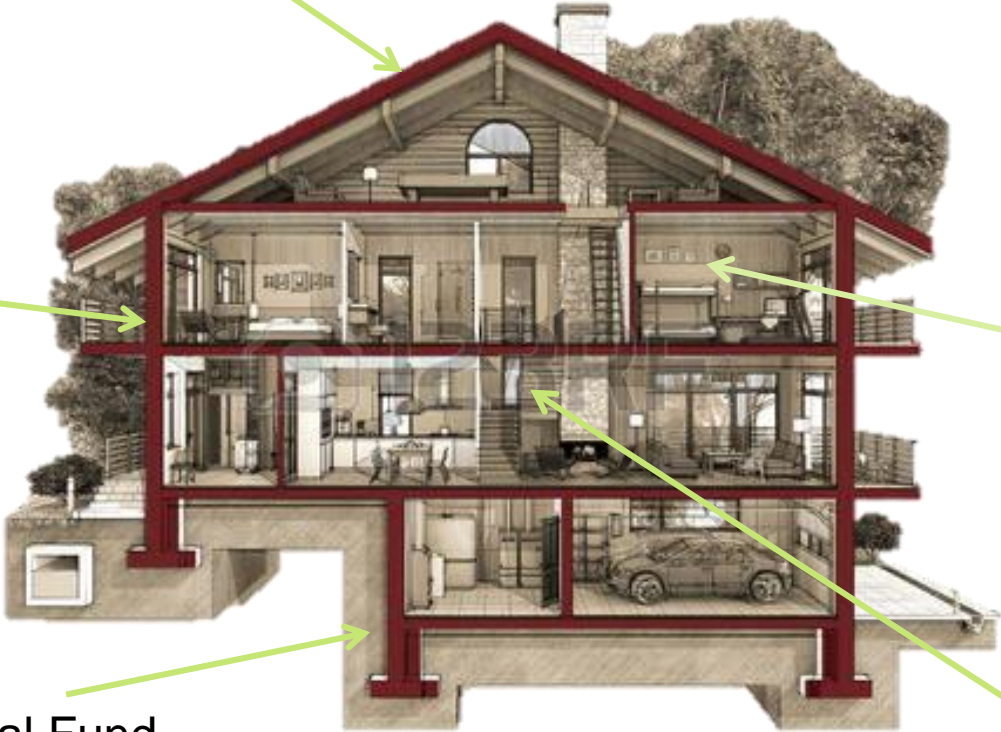
Organizational Mission

Leadership Gifts

Major Gifts

Annual Fund

Planned Gifts



FIVE STRATEGIES TO INCREASE
**ANNUAL FUND
 REVENUE**
 GROUNDBREAKING FUNDRAISING SOLUTIONS FOR NONPROFITS

Pamela H. Witter, MBA
www.BeASeedPlanter.com
BeASeedPlanter@outlook.com



Defining the Annual Fund

A distinct,
renewable,
annual campaign
that raises money
and generates awareness
for a non-profit mission.



FIVE STRATEGIES TO INCREASE
**ANNUAL FUND
REVENUE**
GROUNDBREAKING FUNDRAISING SOLUTIONS FOR NONPROFITS

Pamela H. Witter, MBA
www.BeASeedPlanter.com
BeASeedPlanter@outlook.com



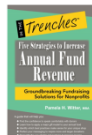
The skill gap



Annual Fund Director

Resources
Education
Process
Strategy
Leadership

Major Gift Officer



FIVE STRATEGIES TO INCREASE
**ANNUAL FUND
REVENUE**

GROUNDREAKING FUNDRAISING SOLUTIONS FOR NONPROFITS

Pamela H. Witter, MBA
www.BeASeedPlanter.com
BeASeedPlanter@outlook.com



The 7 Essential Elements of an annual fund plan

1. A clear dollar goal
2. A hard deadline
3. Gift chart (# gifts needed/ levels)
4. Case for support
5. List of prospects
6. Someone or a team to make visits
7. Strategy timeline with tactical milestones

Ready BEFORE Day One!



FIVE STRATEGIES TO INCREASE
**ANNUAL FUND
REVENUE**
GROUNDBREAKING FUNDRAISING SOLUTIONS FOR NONPROFITS

Pamela H. Witter, MBA
www.BeASeedPlanter.com
BeASeedPlanter@outlook.com



The Annual Fund Visit Program

1. \$1,000-\$4,999 capacity with higher engagement scores
2. Young professionals, entry level pay grades
3. Major gift officer training ground
4. Larger lists that are geographically specific
5. Intense, short-term training
6. Clearly outlined process & scripts
7. Add AF asks to all MG asks
8. INCLUDE handwritten note campaigns



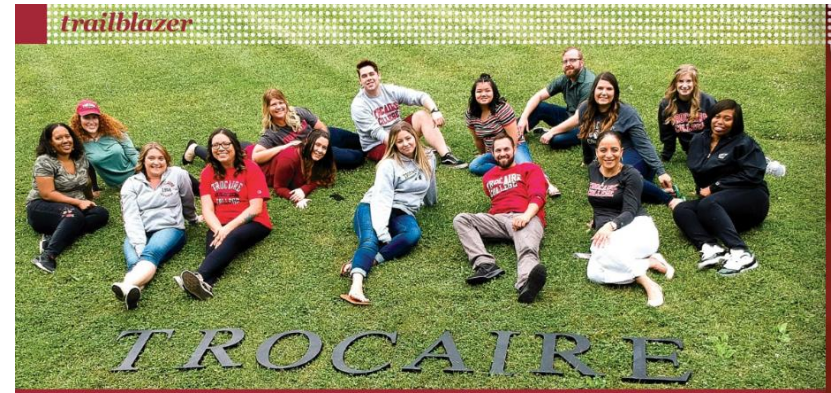
FIVE STRATEGIES TO INCREASE
**ANNUAL FUND
REVENUE**
GROUNDBREAKING FUNDRAISING SOLUTIONS FOR NONPROFITS

Pamela H. Witter, MBA
www.BeASeedPlanter.com
BeASeedPlanter@oulook.com



A 4-Step Process for High-End AF Asks

1. Research
2. Visit
3. Tell the Story
4. Connect to the Donor's Needs



FUNDING THE FUTURE FOR WNY

Last year, Trocaire College educated more than 1,200 Western New Yorkers to fill local jobs in healthcare, business, hospitality and technology. Nearly all of them were low to median income. Many were mothers. About half attended part-time because they were working or raising a family. Every single student sought opportunity to raise them out of their circumstances while pursuing careers of achievement and lives of purpose.

Yet, the average gap a Trocaire student faces—after all financial aid is applied—is nearly \$5,500. This can be an insurmountable obstacle when paying for rent, childcare, transportation, and putting food on the table. In fact, in a recent survey, 36.5% of our students said they experienced hunger but didn't eat because they couldn't afford enough food, yet are doing everything they can to pay tuition and move their families forward.



10 trailblazer 2018

The Board of Trustees and Executive Team have identified their financial gap as a priority in the 2020 Strategic Plan. We intend to fund the pipeline of low to median income students willing to work hard to improve their lives locally.

Over the next two years, Trocaire will seek support from the community to **FUND THE FUTURE FOR WNY**. We believe in the Mercy tradition and education as a means to solve family poverty. We don't just transform lives. We transform communities.

WILL YOU JOIN US?

For more information, contact **Pamela Witter**, vice president for Development and Community Engagement, at **716-827-4344** today!

BY THE NUMBERS

Lowest private college tuition in WNY:

\$17,290

98%
of students
qualify for financial aid

50%
of Trocaire students
receive Pell Grants
(the low-income indicator)
That's the highest % at WNY privates!

\$5,470
is the average **unmet financial need** of a Trocaire student.

100%
of students participate
in service learning



FIVE STRATEGIES TO INCREASE
**ANNUAL FUND
REVENUE**

GROUND-BREAKING FUNDRAISING SOLUTIONS FOR NONPROFITS

Pamela H. Witter, MBA
www.BeASeedPlanter.com
BeASeedPlanter@oulook.com



Overcoming the FEAR of the ASK

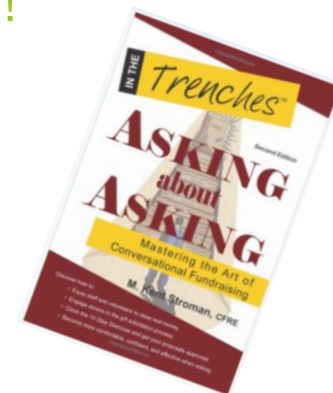
Train, or use my MGO's to train,
Annual Fund Officers.

Relax. It's a conversation.
Are you going to ask me for money?!
Always take the meeting!

Mission you love.
Needs of those you serve.
Invitation to join you.

How to USE the gift chart!

We don't twist arms. The donor is in
the driver's seat.



FIVE STRATEGIES TO INCREASE
**ANNUAL FUND
REVENUE**

GROUNDREAKING FUNDRAISING SOLUTIONS FOR NONPROFITS

Pamela H. Witter, MBA
www.BeASeedPlanter.com
BeASeedPlanter@outlook.com

