

Tricks of the Trade: Tips on Building a Fundraising Program

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Development Planning

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Donor Funnel

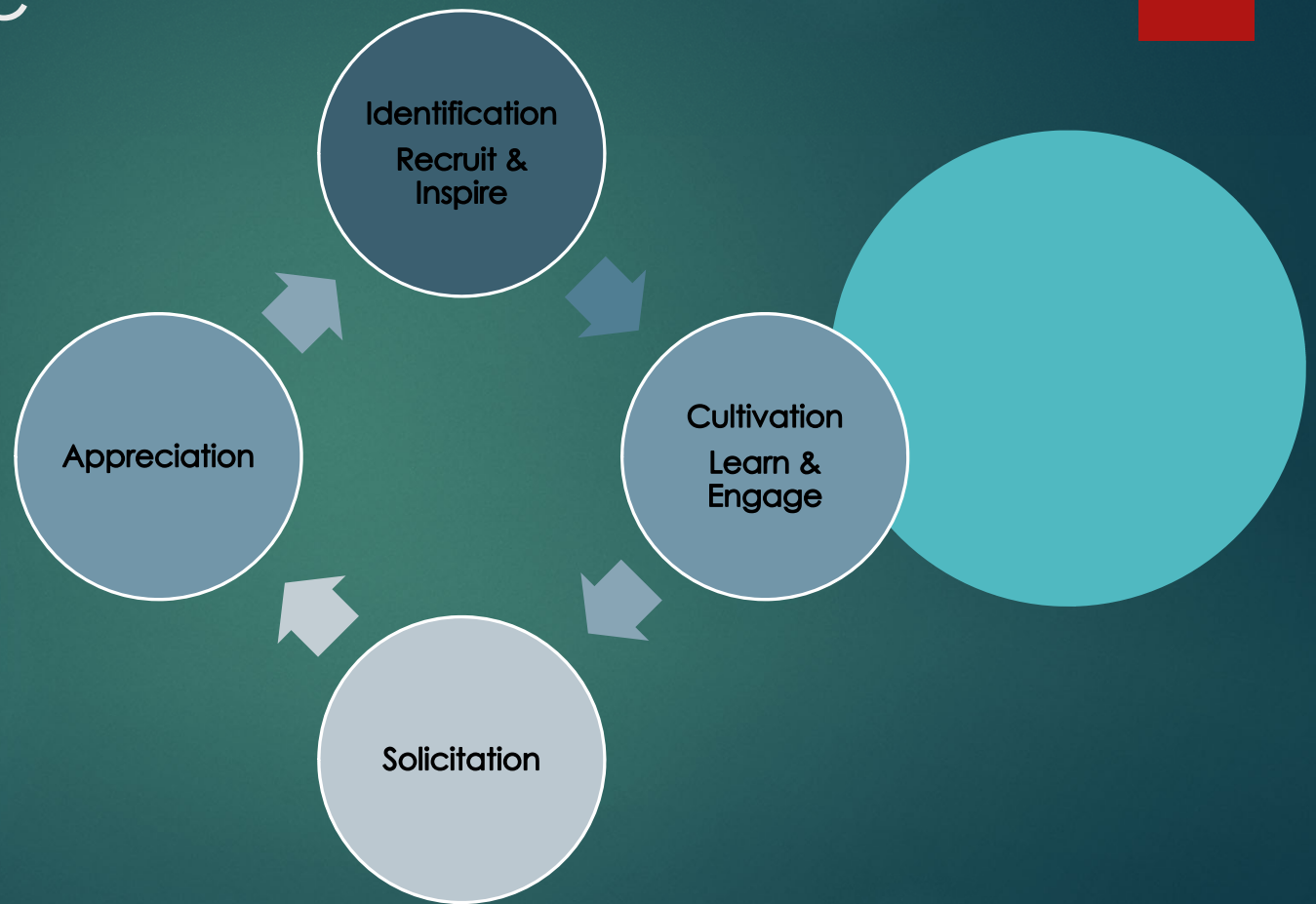


Annual Fund Donor
Retention, Direct Mail, Multi-
Chanel Solicitation

Corporate Partnerships,
Foundation Proposals, Leadership
Gifts, EITC

Major Donors, Planned Gifts

Donor cycle



Donor Engagement and Cultivation



NORTH ALLEGHENY ALUMNI NETWORK

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Teacher Appreciation

Teacher Appreciation week is quickly approaching. We'd love your help in telling our North Allegheny Teachers (current and retired) just how much we all appreciate them. Send them a note and we will deliver it the week of May 6th! For an extra special note, add their name to the Honor Someone Special Wall, plant a tree in their honor or add a bench to their favorite school.

Notes for North Allegheny Teachers

✕ Note 1

Teacher

Grade or Subject

Building

Your Note of Appreciation

☐ Add them to the Honor Someone Special wall (\$50 donation)

☐ Add a Tree with a plaque in their honor (\$700 donation)

☐ Add Bench with an engraved plate in their honor (\$2,000 donation)

+ Add Note

Your Information: Name

Email

Graduation Year

Address

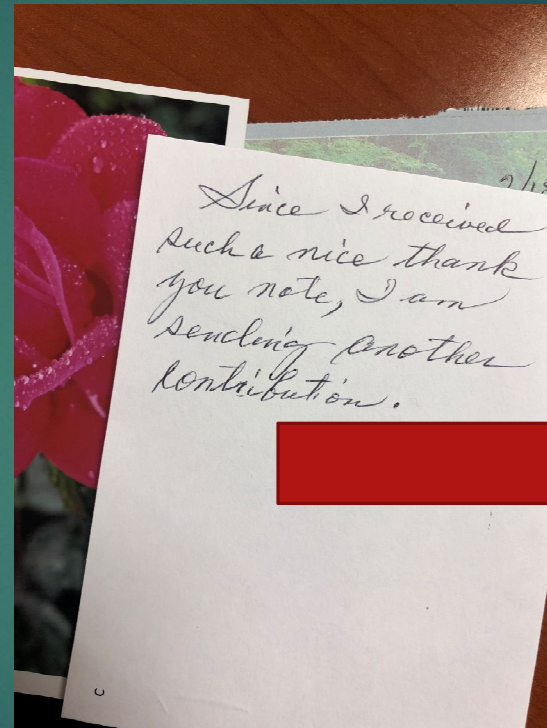
Gift Recognition

This is where creativity is key!



Gift Range	Letter	Phone Call	Next Steps	Valentines Day	Because of You Reception	Annual Report Listing	Invitation to school musical	
Under \$100	Within 3 days	None				Yes		
\$100-\$250	Within 3 days	None			Yes	Yes		
\$250	Within 3 days	From Executive Director		Valentine Card signed by Board Member	Yes	Yes	Yes	
\$500	Within 3 days	From Executive Director		Valentine Card signed by Board Member	Yes	Yes	Yes	
\$1,000 & Above	Within 3 days	From Board President	Call from Executive Director	Valentine Card signed by Board Member	Yes	Yes	Yes	

Donor Valentines



We think you're Dandy....and We're Not Lion! Card included a few things we had accomplished with donor support and a large note written by a board member.

Make the most of your cards



Thank you for your support of North Allegheny Foundation.

Because of your generosity:

- * Financial support is offered to families who struggle with the cost of class supplies and field trips.
 - * Life Skills students at Marshall Middle school have started their own coffee shop with delivery service.
 - * Robotics, Coding and Makerspaces are engaging students at all NA Schools.
 - * Traveling Art Gallery prints were replaced for seven elementary schools.
 - * Peebles Elementary students are growing a tower garden.
 - * Five scholarships will be awarded to NA graduating seniors.
- And much more!

Sea Turtles painting by Marshall Elementary student.

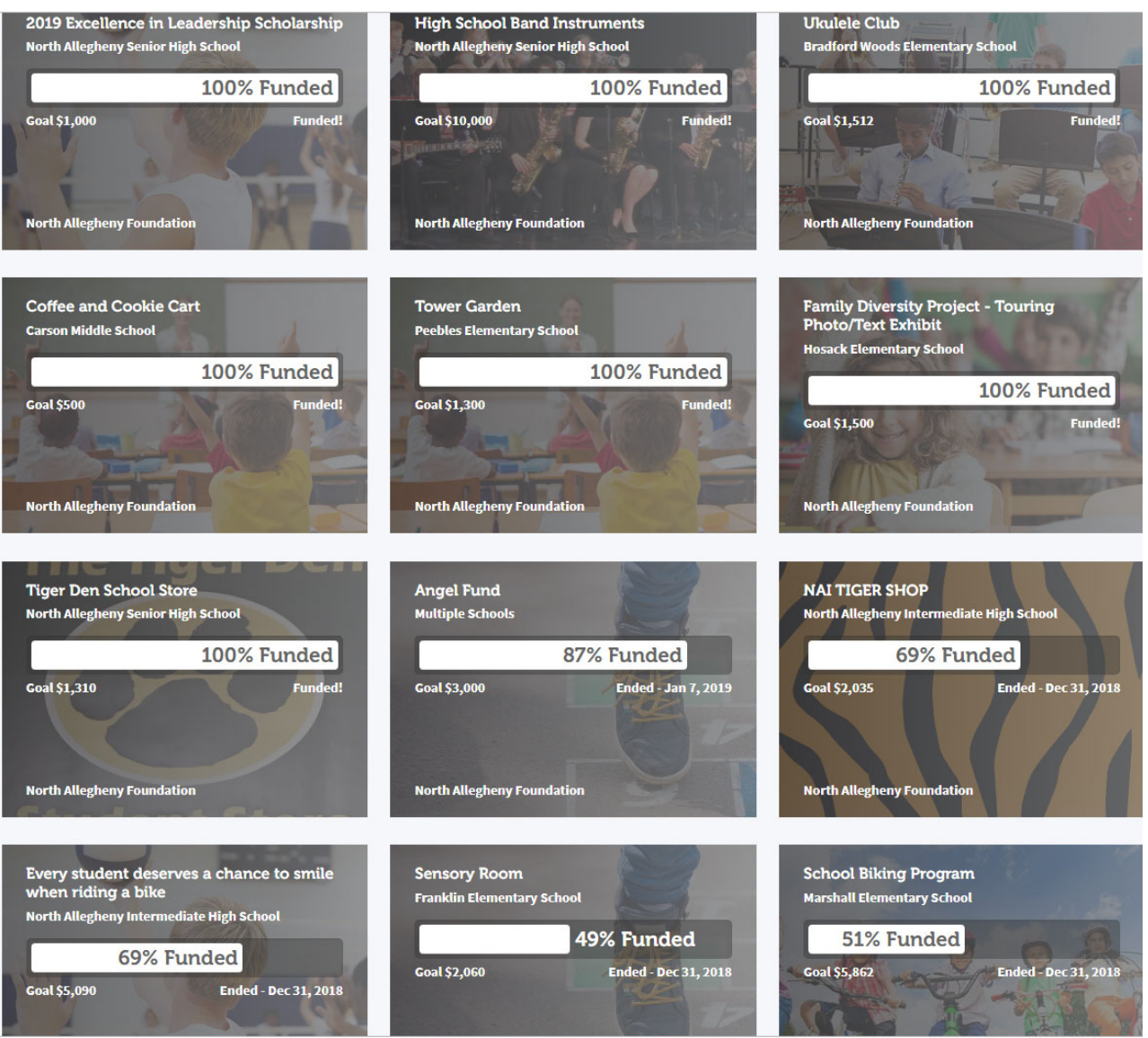
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North Allegheny Foundation
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NA
NORTH ALLEGHENY
FOUNDATION



Alumni Businesses





Resource:
FoundationGive

NA Foundation Calendar						
2018 Tasks 2019 Tasks						
All Tasks 2 hidden fields Filter Group Sort Color ...						
Task	Committee Assignment	Target Comp...	Task Type	Completed	Critical Level	
63 Order Yellow Envelopes for Fall Annual Appeal ...	Alumni Relations	10/16/2018	Communications	✓		
64 Onboard Process for Almbase	Alumni Relations	10/16/2018	Communications	✓		
65 Design Medals for Event	Trick or Trot 5K	10/17/2018	Event Management	✓		
66 Send Renewal / Upgrade personal letter to all ...	None	10/18/2018	Solicitation	✓		
67 Secure Bananas, Food, Water and Airhorn	Trick or Trot 5K	10/19/2018	Event Management	✓		
68 Order sponsor recognition banner and signs of...	Trick or Trot 5K	10/19/2018	Event Management	✓		
69 Mail Alumni Mugs	Alumni Relations	10/19/2018	Solicitation	✓		
70 Arrange volunteers for event day	Trick or Trot 5K	10/22/2018	Event Management	✓		
71 Create Half sheet for NA Foundation for bag st...	Trick or Trot 5K	10/22/2018	Event Management	✓		
72 Prepare Distinguished Alumni Voting system a...	Alumni Relations	10/23/2018	Event Management	✓		
73 Annual Meeting with School Board	None	10/24/2018	Leadership	✓		
74 Stuff Bags	Trick or Trot 5K	10/26/2018	Event Management	✓		
75 Setup Course	Trick or Trot 5K	10/27/2018	Event Management	✓		
76 Event Day	Trick or Trot 5K	10/27/2018	Event Management	✓		
77 Deliver Volunteer gifts and leftovers from race	Trick or Trot 5K	10/29/2018	Event Management	✓		
78 Prep Letter for Fall mailing	Alumni Relations	10/30/2018	Communications	✓		
79 Plan Annual Campaign - write letter	None	10/30/2018	Solicitation	✓		
80 Launch Almbase	Alumni Relations	10/30/2018	Communications	✓		
81 Set Date for Alumni Awards Selection	Alumni Relations	10/30/2018	Event Management	✓		
82 Mail second round of Alumni Mugs	Alumni Relations	10/30/2018	Communications	✓		
83 Mail Annual Report to donors	None	10/31/2018	Communications	✓		
84 Annual Direct Mail asking for donors to renew ...	None	11/1/2018	Solicitation	✓		
85 Trick or Trot Recovery Meeting	Trick or Trot 5K	11/6/2018	Event Management	✓		
86 Hold Distinguished Alumni Award Selection me...	Alumni Relations	11/12/2018	Event Management	✓		
87 Setup Alumni Gala Ticketing Page	Alumni Relations	11/12/2018	Event Management	✓		
88 Trustee Meeting	Full Trustees	11/13/2018	Leadership	✓		
89 Mail Trick or Trot award winner engraved tags	Trick or Trot 5K	11/15/2018	Event Management	✓		
90 Distribute HPE Grants from Trick or Trot registr...	Trick or Trot 5K	11/15/2018	Event Management	✓		
204 records						Sum 77

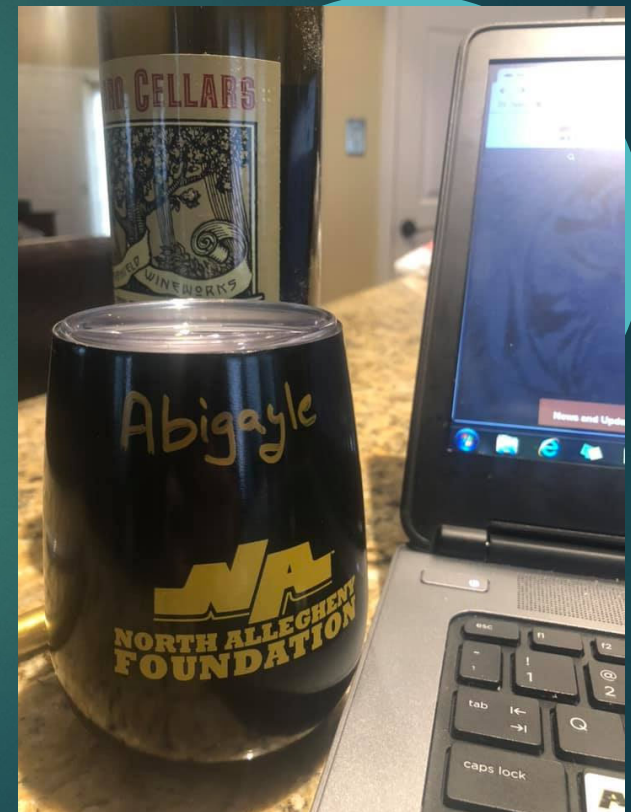
Fundraising Calendar Recommended Resources: Airtable

Events vs. Other Strategies

- ▶ Cost per dollar raised
- ▶ The right mix of events and other strategies
- ▶ The key to maximizing events is the donor engagement and cultivation after the event and in the mission



Resource: Moxie Events Selfie Station



Event Auctions Consignment and Auctria



North Allegheny Foundation
2017 Annual Appeal
Projections and Results

Segment	Description	Total Pieces	Projected Response Rate	Projected Response Donors	Actual Response rate	Actual Response Donors	Projected Donations	Actual Donations	Projected Average Gift Size	Actual Average Gift Size
Annual Donors T1	95 Existing top annual fund donors with hand signed letters. Request fields will be based on giving history. Letter focused on continuing the mission. (\$60-\$130-\$230) Expected Donations: \$3,990 Average gift size: \$70, 60% Retention Rate	95	60%	57	25.26%	24	\$ 3,990	\$ 3,906	\$ 70	\$ 162.75
Event Attendees T2	193 Recent event attendees, with printed signatures. Request fields will be based on giving history. (\$30-\$60-\$130) Expected Donations: \$3,900 Average gift size: \$40, 50% Retention Rate	193	50%	97	4.66%	9	\$ 3,900	\$ 658	\$ 40	\$ 73.11
Alumni T3	477 DS1-1 Alumni with hand signed letters and larger request fields. (\$60-\$130-\$230) Expected Donations: \$250 Average gift size: \$50, 1% Response Rate	477	1%	5	0.63%	3	\$ 250	\$ 568	\$ 50	\$ 189.17
Alumni T4	2,691 DS1-2 – DS1-3 Alumni annual fund solicitation letters with larger ask amounts and printed signature (\$60-\$130-\$230) Expected Donations: \$675 Average gift size: \$50, .5% Response Rate	2,691	0.5%	13	0.30%	8	\$ 675	\$ 1,035	\$ 50	\$ 129.38
Alumni T5	18,989 Alumni annual fund solicitation letters with standard ask amounts and printed signature (\$30-\$60-\$130) Expected Donations: \$2,850 Average gift size: \$30, .5% Response Rate	18,989	0.5%	95	0.21%	40	\$ 2,850	\$ 2,298	\$ 30	\$ 57.45
Non-Solicited	Individual donations that were not as a result of the mailed campaign.					34	\$ 5,429		\$	\$ 159.66
Total Campaign		22,445	1%	267	0.53%	118	\$ 11,665	\$ 13,893	\$ 43.74	\$ 117.74

Sample Direct Mail Segmentation

Sample Direct Mail Timeline

Direct Mail Project Timeline

September 12
Annual Report
mailing to all
donors

October
Printing

- 22,160 yellow window envelopes with Alma Mater on front
- 288 yellow window envelopes with donor message on front
- 22,448 legal sized letters, color, quad folded with address block in window
- 22,448 #9 return donation envelopes

November 6
Mail drop of all
direct mail
solicitations

November 14
Email solicitation of
alumni and existing
donors

November 25
"Thankful for
Donors" social
media / email push

November 28
#GivingTuesday
social media push

December 10
Follow-up letter to
non-responses of
Tier 1, 2 and 3
(<765)

Sample Letter

Dear Kevin,
I'd like to take a moment to introduce two of our students.

Last year, NA Foundation invested over \$100,000 to prepare our students for success in a changing world.

Jeff recently lost his last family member. He's homeless. His teacher called asked if we could provide help - a hoodie, socks, soap and snacks. **Of course we did, your donation made that possible.**

Sally is learning to take a public bus, buy groceries and make a birthday cake. These skills are important as she has a developmental delay and will soon age out of public education. Her class trips to practice these skills are possible because of you.

Your renewed contribution impacts the education of all North Allegheny students as well as **the remarkable work of our teachers.**

A donation of **\$60** supports new artwork for the Traveling Art Gallery at each elementary school.



A donation of **\$130** sends middle school Life Skills students into the community.



A donation of **\$260** purchases robotic kits and materials for Maker Spaces.



Will you join hundreds of other NA families as we prepare all students for success in a changing world?

Every gift, no matter the size, is important and makes a difference.

Thank you,

Abigayle Tobia
Executive Director, North Allegheny Foundation

PS: If you choose to contribute at least \$100, please join us in August for the ***Because of You*** reception when we announce our 2019 grant awards. It's a great opportunity to talk with NA teachers directly about the impact of your gift.

CRM – Donor Database

- ▶ Several options to fit small budgets including Bloomerang, Little Green Light, NEON and GiftWorks. Ask colleagues what they like and why.
- ▶ It is important to move away from Excel sheets – especially as you consider wealth screening services.



Sample Wealth Screening: DonorSearch

Show **25** entries

[Change User Field Names](#)
[Add to Portfolio](#)
[Select Portfolio](#)
[Clear](#)
[Update](#)
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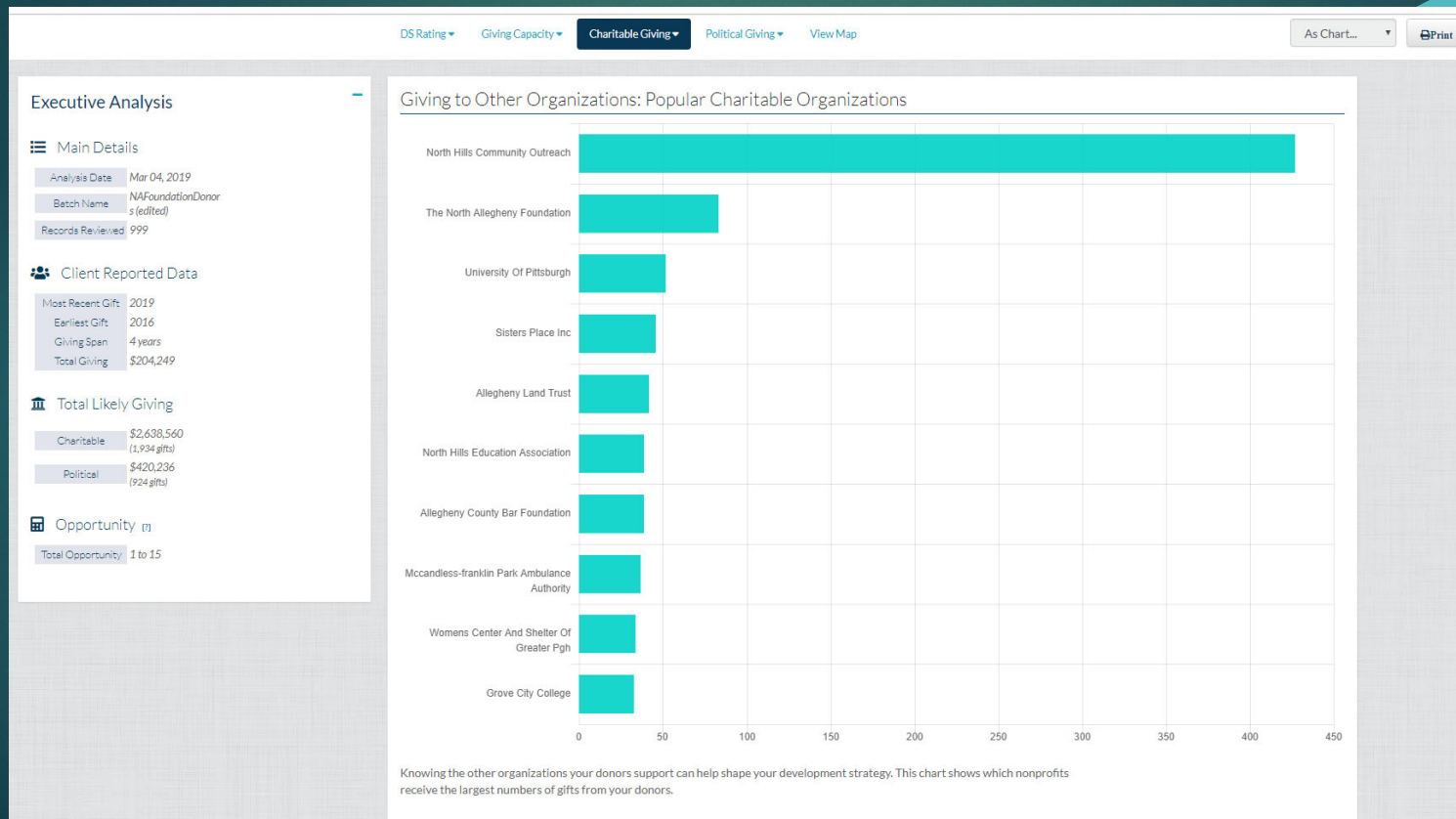
☐ User Given
 ☐ Charitable
 ☐ Wealth

First Name	Middle Name	Last Name	DS Rating	Quality Score	Profile	RFM Total	Last Gift Date	Total Gift Amount	# Of Gifts	Age	Date of Birth	Phone Number	Address	Address 2	City	State	Zip	ID
			Expand	Min: Max:	New <input type="checkbox"/> IDP <input type="checkbox"/> Detailed <input type="checkbox"/>	Min: Max:	Min: Max:	Min: Max:	Min: Max:	Min: Max:	Min: Max:							
			DS1-1	17.9	IDP	297	01/29/2019	46748	12	61					Wexford	PA	15090	963177
			DS1-4	20.1	IDP	295	01/31/2019	855	27	0					Pittsburgh	PA	15222	963636
			DS1-4	17.8	IDP	294	01/31/2019	750	16	0					Pittsburgh	PA	15237	963370
			DS1-1	20.0	IDP	294	01/31/2019	1504	6	0					Pittsburgh	PA	15213	963759
			DS1-5	18.6	IDP	294	01/27/2019	971	18	0					Bradford Woods	PA	15015	964152
			DS1-4	20.0	IDP	293	01/28/2019	2540	7	0					Wexford	PA	15090	963792
	H		DS1-4	17.0	IDP	292	01/14/2019	1931	9	0					Sewickley	PA	15143	963369
			DS1-5	19.3	IDP	291	01/18/2019	1366	11	0					Wexford	PA	15090	963797
			DS1-5	19.8	IDP	291	01/31/2019	380	29	0					Moon Township	PA	15108	963630
			DS1-1	20.0	IDP	291	01/29/2019	1181	5	0					Wexford	PA	15090	963373
			DS1-4	19.0	IDP	290	12/23/2018	1525	30	0					Wexford	PA	15090	963043
			DS1-5	18.3	IDP	289	01/21/2019	881	6	0					Pittsburgh	PA	15237	963807
			DS1-4	19.5	IDP	289	02/11/2019	345	9	0					Wexford	PA	15090	963390
			DS1-2	20.0	IDP	289	01/29/2019	565	8	61					Wexford	PA	15090	963167
	T		DS1-5	17.0	IDP	287	12/31/2018	614	11	0					Allison Park	PA	15101	963376
			DS1-4	19.7	IDP	287	01/28/2019	657	4	0					Freedom	PA	15042	964497
			DS1-5	20.0	IDP	285	01/15/2019	459	8	0					Cranberry Twp	PA	16066	963178
			DS1-5	20.0	IDP	285	12/18/2018	4000	4	0					Pittsburgh	PA	15237	963366
	T		DS1-5	17.0	IDP	284	11/27/2018	1858	17	0					Wexford	PA	15090	963368

Showing 1 to 25 of 999 entries

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[5](#)
[...](#)
[40](#)
[Next](#)

Sample Wealth Screening: DonorSearch



Major Gifts

- ▶ Major gifts are still the most cost effective way to fundraise
- ▶ The challenge is prioritizing those relationships when you're a small organization, so much to do!
- ▶ Prioritize your top 40 Major Gift Prospects
- ▶ Invite a team to help you
- ▶ Build the relationships and strong mission marketing

Major Gifts Resource



The Lucrative Art of Great Discovery

A step by step guide to quickly build
rapport & make the most of every
moment with your donor

Rachel
MUIR

 bloomerang

Sponsorships – The Right Fit for Some!



**NORTH ALLEGHENY
FOUNDATION**

2019 Partnership Opportunities

- ▶ Annual Sponsorship
- ▶ Taste of NA
- ▶ Golf Classic
- ▶ Trick or Trot 5K / 1 Mile



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Resources to Consider
Video: [Promo.com](https://www.promo.com)

THANK YOU, THANK YOU!
THANK YOU, THANK YOU!
THANK YOU, THANK YOU!
THANK YOU, THANK YOU!
THANK YOU, THANK YOU!
THANK YOU, THANK YOU!
THANK YOU, THANK YOU!

SUN
28 x

Superhero Day

Is it a coincidence that #Superhero Day and #Avengers Endgame are in the same week? We think not! Post this #marvelous video packed with all the things you didn't know about #StanLee's greatest creations.

[Get this video](#)

MON
29

International Dance Day

We're #dancing with excitement over this seriously #jamming holiday. #Shake up your channels with an up #tempo video to get your followers in the #groove!

[Get this video](#)

TUE
30

Honesty Day

Play the famous #game, Two Truths and A Lie, with all your followers across your socials to celebrate #HonestyDay. Pro Tip: Give away a little prize to one #lucky follower who got it right.

[Get this video](#)

WED
01

Lel Day

Celebrate #LeiDay by getting into the #AlohaSpirit with a colorful, vibrant video sure to catch all those content hungry eyes. #ProTip: Ask your followers to comment with their fave flower emoji to get a virtual #lei train started.

[Get this video](#)



THU
02

Congrats, Grads!

It's officially #graduation season. Give the grads the #congrats they deserve. #ProTip: Graduation ceremonies take place throughout the entire month, so take the chance to keep the convo going with more than one special video.

[Get this video](#)

FRI
03

Ramadan

#Ramadan marks a month long observance and time of reflection and #devotion. Show your #support with a beautiful greeting ahead of the weekend start date.

[Get this video](#)

SAT
04

Star Wars Day

#StarWarsDay is finally here! Don't miss this chance to use one of the world's best #puns with all of your #Jedi loving fans. #ProTip: Write all your social post for the day just like #Yoda speaks. Make them laugh, you will.

[Get this video](#)



SUN
05

Cinco de Mayo

#Fact: Most people incorrectly think #CincoDeMayo is Mexico's Independence Day. Share this & some other interesting facts about the #truth of this special celebration of underdogs.

[Get this video](#)

MON
06

No Homework Day

#NoHomeworkDay is here! If you listen carefully you can hear the #excitement exploding everywhere. Share the joy with all your followers because it doesn't matter if you're a student, teacher, or parent, everyone deserves a #break.

[Get this video](#)

TUE
07

Cosmopolitan Day

Bust out the cranberry juice, vodka, orange liqueur, and share this video with all your friends to #shake up a good time for #CosmopolitanDay.

[Get this video](#)



WED
08

#WaybackWednesday

Is there anything more #classic than #CocaCola? Probably not. Celebrate the invention of this iconic refreshment with this fact-full video. #ProTip: Have your followers comment with the drink emoji for a chance to win a #prize.

[Get this video](#)

THU
09

Teacher Appreciation Day

Remember your favorite #teacher? You can likely thank them for most of your successes today. Pay tribute to teachers everywhere to #thank them for their tireless dedication.

[Get this video](#)



FRI
10

Military Spouse's Day

Behind every #soldier stands a #family who loves and supports them no matter how far they go. Show support for those #military spouses and family that make up a decent part of your audience.

[Get this video](#)

SAT
11

Eat What You Want Day

In a perfect world, every day is eat what you want day. But since it only happens once a year, go wild and encourage your audience to treat themselves to their favorite indulgences.

[Get this video](#)

SUN
12

Mother's Day

MON
13

#MotivationMonday

TUE
14

Mark Zuckerberg's

WED
15

World Meditation Day

THU
16

Global Accessibility

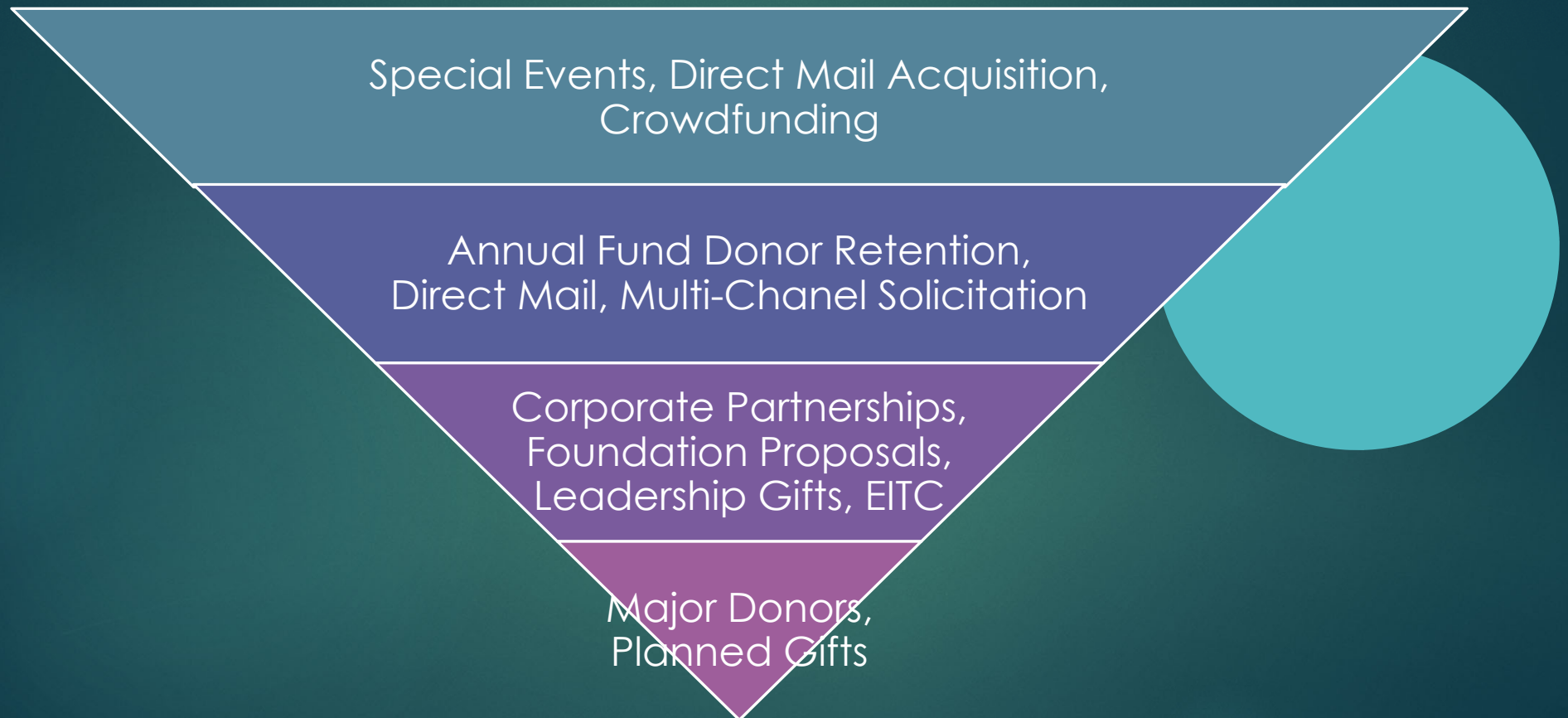
FRI
17

Blake to Work Day

SAT
18

World Whiskey Day

It All Works Together



Resources to Consider

- ▶ Quick social medial graphics: [Canva.com](https://www.canva.com)
- ▶ Cheap and comprehensive online forms: [Cognito.com](https://cognito.com)
- ▶ Gail Perry's resources – Insiders, Major Gifts Coaching, blog and email.
- ▶ Bloomerang has good webinars, downloads and community resources for all nonprofits

Questions, Thoughts and More

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