

# Fundraising 101

presented by Gary Chounard for the New Brunswick Museum Association

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## Outline

- From the Not for Profit Organization (NPO) 's mission strategic plans and objectives that fundable projects arise - the best approach is to link stories to the fundable projects
- Organizational statistics vs. a story of a family member's experience with a Museum  
The story is more impactful followed by "that's why I am involved with the Vision of the NBM to collect, preserve, research and interpret material for the purpose of ..
- Know how to link elements of your Museum's mission to a variety of stories from different museum perspectives: member, donor, volunteer, artifact, researcher, curator,
- Elements of a good story – use 4 examples from Museum perspective
- Table of fundable projects using Case categories, subcategories and project examples
- Use of Rosso's concentric circles for best prospects ,text based profile of fictional qualified donor prospect (template) & simplified second degree relationship map
- Donor's Bill of Rights, AFP Code of Ethics & Donor Privacy Policy ( draft template)
- Characteristics of a fund raising volunteer (may surprise you where your best source is)
- Strategies in a 6 month span for how to excite your Board about getting involved in the development process from donor stewardship to prospect identification/cultivation to prospect solicitation
- Report templates to monitor steps in the cultivation process. Walk the Board through each cultivation funnel. Tailor the funnel to individual donor prospects

## Where stories linked to your Museum's fundable projects come from?

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- “It is from your Museum’s mission statement, your strategic plans, organizational objectives and all people involved in some way with your Museum that effective stories linked to fundable projects will arise”
  - Source: AFP’s Survey Course participant manual.
- Annual reports are often the Museum’s organizational statistics - No. of visitors, no. of members no. of research inquiries, etc. people photos but few compelling stories
- Try another way – use an individual story to show impact of a Museum visit & then relate it to a statistics snapshot.

## Grabbing your attention- a story or a statistic

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- A New Brunswick Museum statistical report “ Since the summer of 2012, 215 people have attended the 9 NBM Geo walks hosted by Randy Miller curator of Geology & Palaeontology and Gary Hughes Curator of Industrial History and Technology to launch the new *Rebuilt in Stone* book”

- or

- *A Geo walker's story- NBM geology & industrial history/technology* -  
-in the story below, Eve recounts her NBM Geo-Walk experience:  
“I had a lovely time, and I am going to suggest to the Halifax(NSAS)archaeological society that we do something similar - the walk, the wine, the book launch...all was fun. I love decoding stuff on the land and in the towns, and what a neat way this was to do it. Halifax has a problem that we have a great Natural History museum, a great Maritime museum, but we really don't have the history of the town section that you can boast of in Saint John.”



## Stories linking elements of your Museum's mission from a variety of museum perspectives –everyone has a story

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- Develop a series of stories linked to your Museum's mission from the perspectives of a variety of constituents :
  - a member ( family, individual, other categories)
  - a volunteer (board member, program volunteer, etc.)
  - a researcher
  - an artifact or specimen or one that is loaned to you
  - curator
  - a donor
  - an organization that rents your Museum for an event
  - an individual or institution that loans you an artifact
  - a partner or sponsor

## Elements of a good story

- Focus on connection with the reader not the story detail
- If your Museum story is great and you want to use it; you may address issues of privacy/ confidentiality by changing enough details of the story that the subject becomes unidentifiable /ask the person
- Include five elements in a story (i.e. the Shrewd shrew's escape)
  1. Protagonist or hero (the shrew);
  2. the Problem for the Bioblitz volunteer ( need to have small mammal specimens for the upcoming Open House);
  3. an Obstacle (for the Bioblitz volunteer no small mammals captured the last time; change food lure, design of box;
  4. Awareness (there's hope maybe the fur tuft once studied under the microscope at the Field lab will reveal a lesser known shrew).
  5. Transformation -how this young Bioblitz volunteer now studying as a graduate research fellow at a well known university is acquiring his Ph. D. focusing his current mammalogy research with other scientists at NBM & CMN.

## Elements of a Good story continued

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- Communicates the case for giving for a Museum
- Understandable to audience
- Perspective of a single protagonist
- Certain strangeness or incongruity—odd but plausible with humor
- Embody change
- True
- Simple
- Happy or poignant ending (in the case of the shrewd shrew's escape, the shrew, however Howie did capture specimens of long-tailed shrews for the Bioblitz Open House )

# Matrix of Suggested Fundable Projects (museums)

Case categories & examples

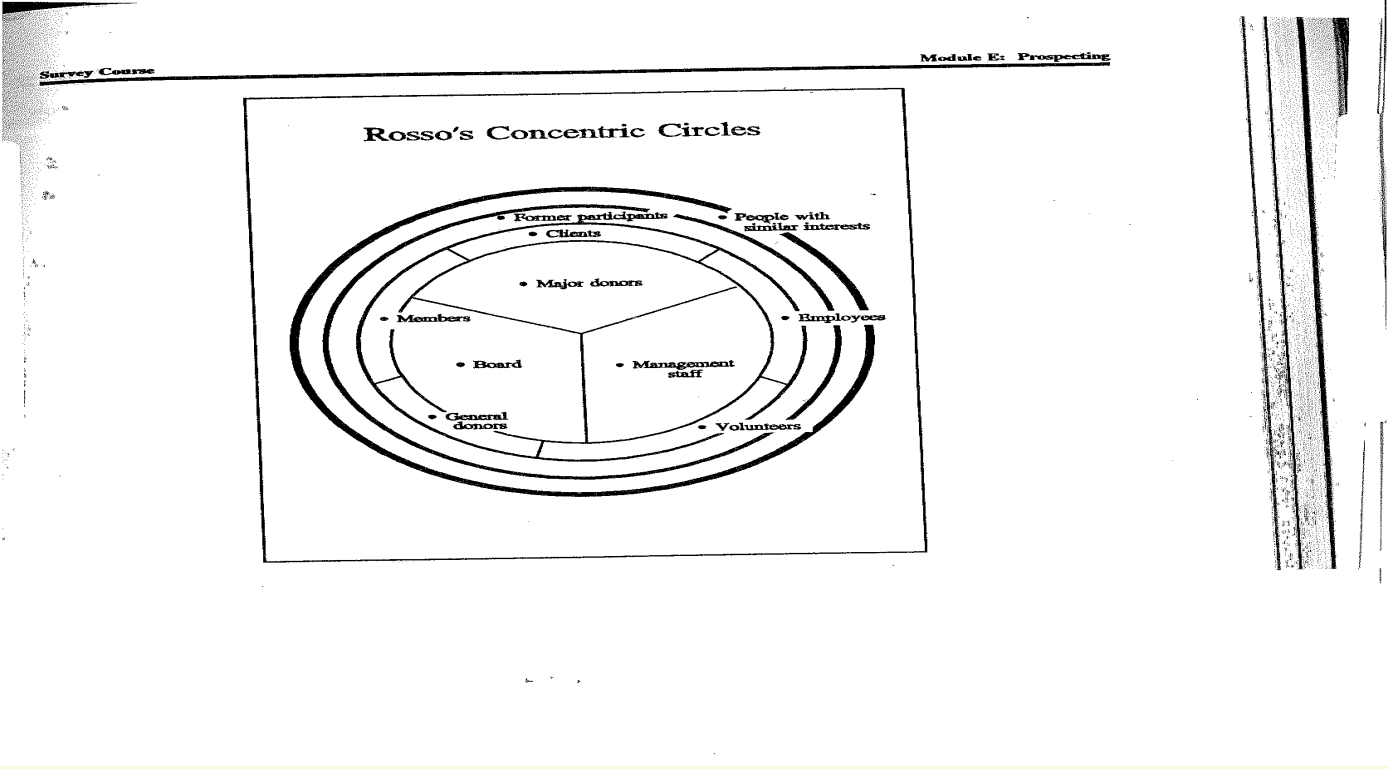
Case Categories	Case subcategories	Examples
Unrestricted Operating Support	<p>1. General operations</p> <p>2. Discretionary annual fund</p>	<p>To support Museum's immediate needs. annual giving campaign Oct/Nov</p> <p>For equipment replacement &amp; training – Jun/July .direct mailer</p>
Restricted Gifts for Operations	<p>Education &amp; Exhibits</p> <p>A program segment</p> <p>Day camp program as part of the new Wolf exhibit – July 2015</p>	<p>-Enhancement of new Kid 's guide –student /families Feb. 2015</p> <p>-Computer terminal for geology gallery –integrate Mag Rocks - Dec. 2014</p> <p>Bioblitz field lab week at the NBM Whale Gallery – March 2015</p> <p>Participants experience the evolution of the “Master of disguises”</p>



## Matrix of Suggested Fundable Projects (museums) Case categories & Examples

Case Categories	Case subcategories	Examples
Restricted Gifts for Special Need	Natural Sciences Grant Funds (Matthew & Christie Endowments )	Launch of book Deborah's letters – donor card & follow up –Nov.
	Equipment	A new exhibit display unit for Discovery Gallery - ongoing
	Special Focus	-Open House participants direct mail campaign Dec -Know Your Own Artist sponsor campaign- Feb - Bioblitz(Mt. Carleton) supporter campaign Mar
Capital	Collections & Exhibition Centres	- Identify /cultivate potential major gift donors- do relationship mapping

# Rosso's concentric circles



Identifying targeted constituencies as potential prospects (Rank 1-5 low->high)

Audience Group	Total Number	Linkage	Interest	Ability	Total Score
Board	18	5	5	5	15
Staff/ employees					
Affiliates (artists, historical society)					
Members					
Volunteers					
Neighbours					
Friends					
Cause-interested					
Organization loyal					
Others					

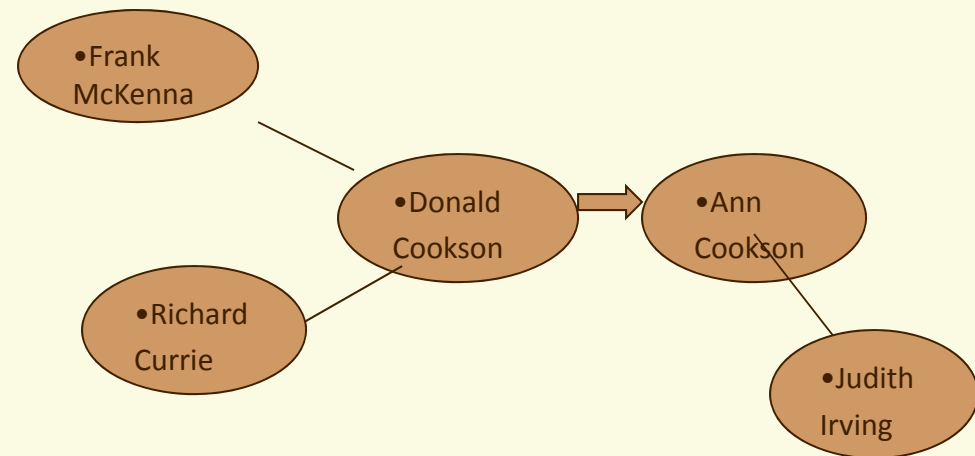
## Profile of a fictional past donor for relationship mapping

### **Donald M. Cookson**

- honorary degree at UNB Fredericton spring convocation D. Litt. 2006
- Primary Business CEO of Tri-D Investment Company , 800 Avon Rd. Ste. 505 Toronto, On M6V 7J5 1-416 -861-9895 Email; [janetc@trid.com](mailto:janetc@trid.com) Janet Cole, executive assistant
- Director of the Toronto Symphony, Mount Sinai Hospital, the Art Gallery of Ontario, and the International Foundation for Art Research
- His dedication to these institutions has continued to improve business technology, the arts, and community well being. Through the Donald and Ann Cookson Foundation, Mr. Cookson & his wife have generously supported numerous ventures/organizations, including Royal Ontario Museum, Hospital for Sick Children & Royal Conservatory of Music.
- Locally, they have supported the New Brunswick Museum Foundation, donated works of art to the Beaverbrook Art Gallery, and established a scholarship at UNB.
- Born in Fredericton, Mr. Cookson is known as a business pioneer and one of the country's leading philanthropists. In 1952, he developed the first cable television system in the country and in 1998 founded a national company licensed to provide public cordless telephone service.
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## Profile of a fictional past donor for relationship mapping cont'd

- Major gift prospects who are friends and acquaintances of Mr. Cookson were a select group of from those that attended an art exhibition held at UNB SJ for the honorary degree classes of 2006-10. They included Richard Currie, Frank McKenna, Sandra and Judith Irving, Mr. Cookson is also connected with William Stanley through board relationship at AH2Inc. the Carbon Saver Company and the senior partner of Stewart McKelvey- Halifax Graham Day. Ann, his wife is good friends with Diane Ganong and Judith Irving. Below is a simplified 2<sup>nd</sup>-degree relationship map for Donald Cookson.



# Association of Fundraising Professionals (AFP) Code of Ethical Principles & Standards & Donor Bill of Rights a NPO's sample donor privacy policy

- Will be given as handouts with important articles in the code and the Donor Bill of Rights noted and reviewed for purposes of Board confidentiality
- Template for Donor Privacy Policy
  - Objective of the donor privacy policy
  - Guidelines –commitment to protect privacy , specify what the charity will not do and specifies for what purpose and in in what circumstance the charity will use the donor information .
  - The charity specifies the conditions when a third party might access information: when the donor agrees that the Charity can publicly recognize a leadership donation (no specific amount mentioned ) on a Donor wall, and another third party access includes Charity staff, Board members and fundraising volunteers who must sign a confidentiality statement adhering to the donor privacy policy) and also third party suppliers who agree to not keep info on file, and as required by law
  - See other considerations who will speak to media about the Donor Privacy policy
  - Sample confidentiality statement to signed by Board Member adhering to Donor privacy policy

# Ideal criteria characteristics of a fundraising volunteer

- Board members are your best candidates as fund development ambassadors, advocates and askers( fundraisers (F-R) for your NPO –

**“What is it about volunteers- board members, in particular that makes them mobilize donors even in the depths of a recession Influence, it seems. Donors say that volunteering one’s time and taking responsibility for the welfare of a charitable cause at the highest level is the ultimate in community service. Donors’ respect for leadership volunteers translates not only into a greater willingness to give, but a willingness to give as generously as they can.” Penelope Burk’s Donor-Centred Leadership** F-R volunteer candidates will include the board, members, donors friend , auxiliaries, existing donors, community leaders, service users, & volunteers.

- Other criteria to evaluate for F-R volunteer depends on the role and task:
- ambassador role- candidate must have NPO knowledge & ability to open doors (a good network)
- advocate role- a good listener to link prospects interest to NPO projects and a good communicator to explain why he/she believes in your NPO’s mission after a story;
- asker role – able to determine pre-ask criteria: Select the right person to ask the right person at the right time, for the right amount in the right way for the right reason.” with training anyone can become an asker ( always ease the person into this role; no dictates)

## Strategies on how to excite your Board about getting involved in the Development process

### Meeting 1

- Incorporate a Mission in the Middle about your NPO related to fund development as the 3<sup>rd</sup> or 4<sup>th</sup> item of each Board meeting agenda - elevator pitch
- Have Board Members listen to a stories about a client served by your NPO , have staff or volunteers offer stories from different angles; a volunteer's story; a donor's story an agency story an inanimate object; use an example of a story
- Brainstorm - approaches that Board members can use to share the NPO' mission with others they meet in social gatherings -telling the NPO story through the above stories
- After telling this personalized story about someone served by ( I hear a but coming) your NPO have Board members say in their own words the pitch "that's why I believe the mission of the NBM is to \_\_\_\_\_ is so important to our community
- Ask members to do homework for the next meeting; to select one or two of the Museum stories to review, with the intent of telling it in the future to a friend. Once they come back having selected their story suggest they rehearse and possibly prepare to roleplay it in the future.



## Strategies on how to excite your Board about getting involved in the Development process

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### □ Meeting 2

Incorporate a Mission in the Middle about your NPO related to fund development as the 3<sup>rd</sup> or 4<sup>th</sup> item of each Board meeting agenda ( topic - donor stewardship)

Provide each Board Member with a recipe card giving the name, phone number of a person describing the gift of time, talent or treasure a person gave to your Museum lately ( planting a garden, winterizing the building ,etc. Ask the Board member to collect their thoughts in a private area , to take their cell phone and phone the person “right now thanking them as a Board member of the ABC Museum ” for their service

□ Have the Board members gather afterwards to give their feedback on their telephone conversation with the donor of time, talent or treasure

□ Ask if anyone wants to roleplay their story with the pitch relating to the NPO’s Mission that’s why I am involved as a Board members

## Strategies on how to excite your Board about getting involved in the Development process

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### Meeting 3

- Board may ask you to review existing policies and develop other policies for all kinds of development/fund-raising situations –may be valid; but could be a stalling tactic. Assess
- Your museum likely has a fund raising policy in accordance with CRA rules , proper receipting, Charity return filed in time; & policies for handling bequests and endowments. Have it ready.
- Re-establish the goal of having a Board actively engaged in fund development telling stories about your Museum to prospective friends. If all Board members have signed the statement to adhere to donor privacy, have them do the exercise on slide 11 of identifying targetted constituencies as potential donor prospects to **get them back on track.**

## Strategies on how to excite your Board about getting involved in the Development process

### Meeting 4

- Incorporate a Mission in the Middle about your NPO related to fund development as the 3<sup>rd</sup> or 4<sup>th</sup> item of each Board meeting agenda (Start identifying upcoming events opportunities and start inviting; tours , expos)
- Ask Board members to identify events opportunities in communities where contacts from allied organization or potential prospects will be present.
- Obtain a commitment from one or two Board members that they will tell her/his story and make his/her cultivation/ elevator pitch on such a day, inviting them to the next Agency event/reception/office Open House/tour – no asking
- Engage Agency staff to coach the Board members in the best way (see note)

### Meeting 5

- Incorporate a Mission in the Middle about your NPO related to fund development as the 3<sup>rd</sup> or 4<sup>th</sup> item of each Board meeting agenda ( Board members report on the exchanges with prospective donors, allies, advocates

## Prospect Activity Report (confidential)

- Prospect's name: Donald M. & Ann Cookson

Address in database

Date	Type	Contact	Comments
3 Mar.2014	Mail	Enquiry	Target mailing ( mailing # 5 2014 re. PlannedGiv- ing returned reply card requesting more info.
4 Mar.2014	Phone	D. Cookson	Phone D.C He & Ann, both receptive to meeting at his home for 29 Mar.
29 Mar.	Phone	From A.C.	Cancelled visit because of Don's Recent cataract operation. Still feeling uncomfortable Rescheduled for April 11> Sent get -well card
11 Apr.	Visit	D. & A. Cookson	Spent 2 hours at their home Talked about their interest in hiking , birdwatching and Ann's paintings of nature. Discussed possible ways of giving to the Museum. Most interested in gifts of life insurance. I am to call in 2wks

## Call report (confidential)

Prospect's name: Rita Jones (fictional)

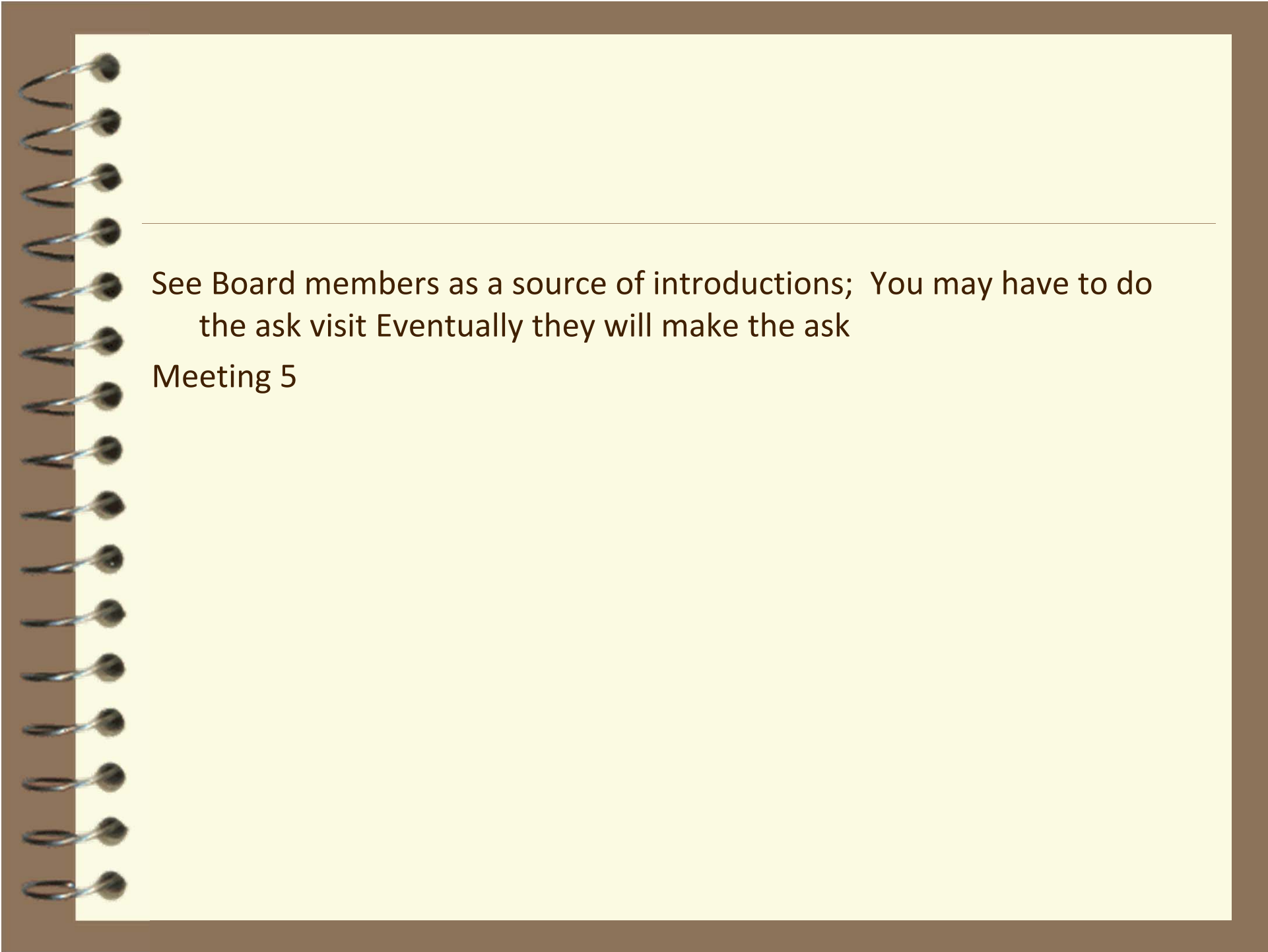
12 Bullock Lane,  
Plaster Rock, NB Tel. (506) 237 -4501 (fictional)

Date: 8 June, 2014

Place: Donor's Home Referred by: Oliver Ellis, Board member

**REPORT:** Met at the prospects home to thank her personally for her recent \$25,000 gift to the Museum to create the NBM Humanities Research grants and to let her know when the curators will be issuing a request for undergraduate and graduate students studying in history and fine arts at Maritime universities to submit their research proposals related to the Museum's collection areas in Humanities.

- Very enjoyable conversation in beautiful surroundings. Mrs. Jones was a very successful criminal lawyer from Toronto who recently moved back to Plaster Rock. We discussed upcoming changes at the NBM. She mentioned that she knew many NBM Board Members and they are doing it the right way, progressing with the Museum expansion plans to obtain the more detailed design work and detailed costing and hosting the Open Houses . Her husband Miles in his eighties attended one of the Open House and being a retired pharmacist, he was most interested in the Museum herbarium research. I spoke of the nature of the fundraising feasibility study and she would not mind being interviewed. She is planning a bequest of what she called a significant size"

A graphic of a spiral-bound notebook with a brown cover and a cream-colored page. The spiral binding is on the left side. A horizontal line is drawn across the page, and text is written below it.

See Board members as a source of introductions; You may have to do  
the ask visit Eventually they will make the ask

Meeting 5

A graphic of a spiral-bound notebook with a brown cover and a cream-colored page. The spiral binding is on the left side. The page contains the title 'Summary' and a subtitle 'a sample donor privacy policy and template Board member adherence to donor privacy policy' separated by a horizontal line.

# Summary

a sample donor privacy policy and template Board member adherence to donor privacy policy

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