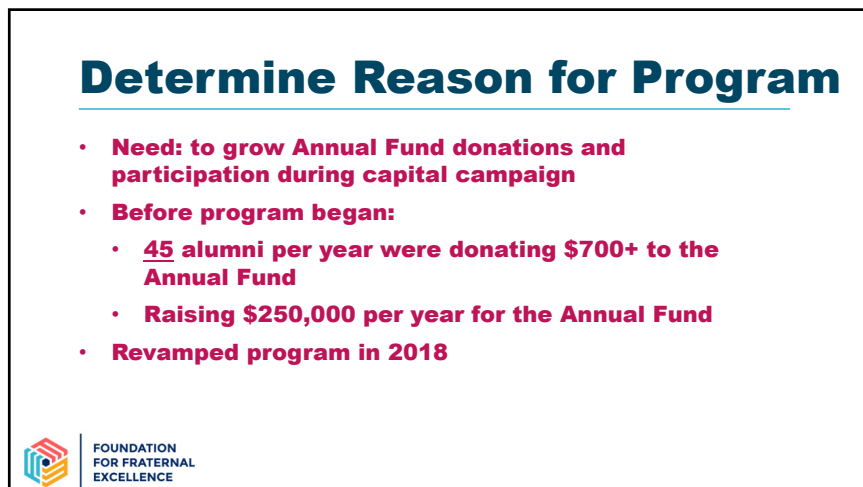


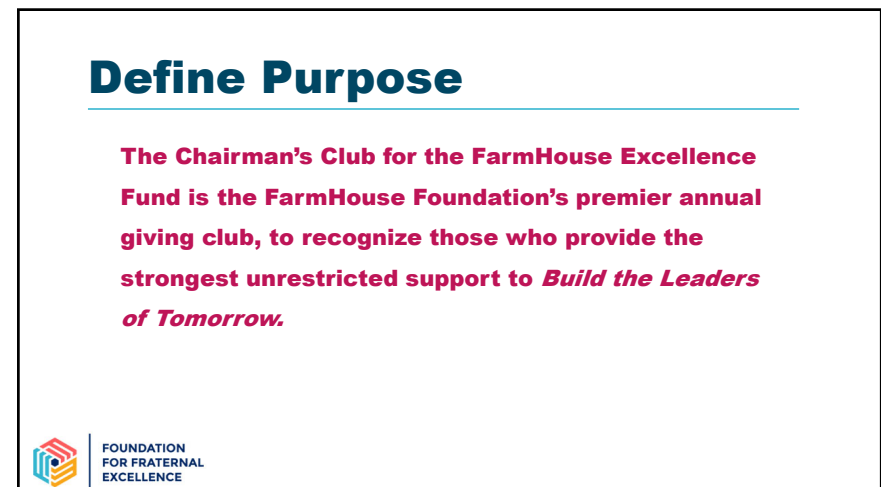
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4

Understand Why People Give

People give because your organization meets needs, not because your organization has needs.

A gift to you is really a gift through you, into the community.

Fundraising is not about money, it is about relationships that lead to giving, based on shared values.

- Kay Sprinkle Grace (August 2018)



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Write Case for Support

The FarmHouse Excellence Fund is a comprehensive rebranding and alignment of our previous Annual Fund in order to cultivate new unrestricted financial support.

The FH Excellence Fund provides funding for cutting edge initiatives and bridges the gap between the services the Fraternity provides through membership dues and the rising costs of values-based education and leadership experiences.



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Three Ways to be Convincing

- **Emotion** – testimonies, photos, ways the world will be a better place because your organization exists
- **Reason** – Statistics, graphs, outputs, outcome measurements and impacts
- **Organizational Credibility** – strong staff, volunteer leadership, and record of success



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Establish Goals

Goals set in 2012:

- to have 100 members join the Chairman's Club annually;
- to provide more unrestricted dollars for the Annual Fund;
- to be included as a part of *Live. Learn. Lead. Campaign* to provide a starting point for a major gift;
- to provide an opportunity to talk about the Annual Fund during one-on-one visits;
- to identify future Trustees; and
- to identify Power of 7 Seminar prospects.

Updated in 2021:

- to have 240 members join the Chairman's Club annually;
- to provide more unrestricted dollars for the FH Excellence Fund;
- to transition housing and restricted donors to unrestricted giving;
- to provide an opportunity to talk about the FH Excellence Fund during visits and be specific;
- to identify future Trustees; and
- to identify Power of 7 Seminar prospects and major donors.



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Set the Stage

- **Provided proposal to Foundation Board to create new Annual Fund program**
- **Started during our 2012-13 fiscal year**
- **Revamped Annual Fund to FH Excellence Fund in FY 2018-19; and continue to update program each year**



9

Integrated into Calendar

- **A major part of Fundraising Plans for the Annual Fund (now the FH Excellence Fund)**
- **Create solicitation month-by-month calendar for all fundraising efforts**
- **Have a comprehensive communications calendar with the Fraternity staff for collaboration**



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Set Budget

- **Set aside funds for fundraising costs**
- **Included stewardship costs in budget for thank you gifts**
- **Determined how much could be done and printed in-house versus outsourcing**



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Create Levels of Giving

LEVELS OF MEMBERSHIP (Membership is annual)

- Chairman's Club | \$1,000 to \$2,499 to the FH Excellence Fund
- Founders' Circle | \$2,500 to \$4,999 to the FH Excellence Fund
- Sower Society | \$5,000 to \$9,999 to the FH Excellence Fund
- Power of 7 Society | \$10,000 to \$24,999 to the FH Excellence Fund
- Crescent Society | \$25,000 or more to the FH Excellence Fund

OTHER FH EXCELLENCE FUND GIVING LEVELS:

- **Charter Circle:** Gifts of \$500 to \$999
- **Anniversary Circle:** Gifts of \$116 to \$499 (In honor of founding)



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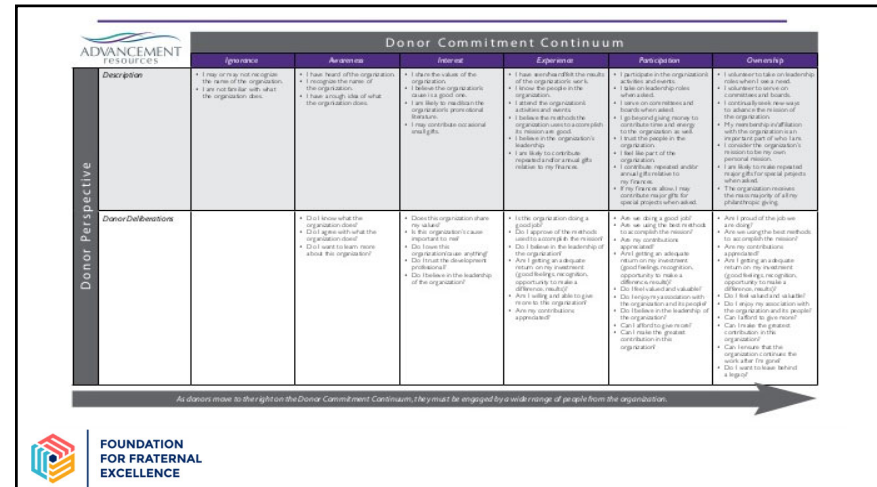
Identify Prospective Donors

- **Past members and VIP donors**
- **Trustees, Fraternity board members, award recipients**
- **Those who have given a one-time unrestricted gift of \$500 or more**
- **Long-time Annual Fund donors**
- **Those who have made a \$5,000 or more restricted gift**
- **Associations & Foundation Councils**
- **Donor visits**
- **Peer and board recommendations**
- **Prospect research**



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Young Alumni Society

- **For those 30 and under (initiated in 2009 and after) who give \$500 or more to the FH Excellence Fund**
- **These donors will receive similar membership benefits as Chairman's Club members**
- **Will promote monthly giving (\$41.67 per month for a \$500 gift)**
- **Focus on past Power of 7 Seminar student attendees for invitation**
- **Encourage peer to peer giving, like the FH Day of Giving and matching challenges to incentivize them to give**
- **Ask Chairman's Club members to consider sponsoring a young alumnus as a matching gift for their participation**



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Create Gift Pyramid

Gift Range	# Gifts Needed	# Prospects Required	Subtotal	Cumulative Total	Cumulative %
\$50,000	1	3	\$50,000	\$50,000	7.7%
\$25,000	7	21	\$175,000	\$225,000	27%
\$10,000	11	33	\$110,000	\$335,000	17%
\$5,000	10	30	\$50,000	\$385,000	7.7%
\$2,500	37	111	\$92,500	\$477,500	14.3%
\$1,000	165	495	\$165,000	\$642,500	25.5%
\$500 young	9	27	\$4,500	\$647,000	0.8%
TOTAL	240	720	\$647,000		100%



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The Ask: Mail

- **Chairman's Club Directory in fall to current donors**
- **Special invitation written by the Foundation Chairman**
- **Convention year – request to give before national convention to be recognized in person at event**
- **Segmented and tailored invitation to donors based on past giving, renewals and never joined before**
- **Reminder invitation by Chairman at end of fiscal year**
- **Special invitation to monthly donors to upgrade and join**



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The Ask: Mail



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The Ask: External Comm.

- **Created dedicated webpages with details about the program and instructions to join the Chairman's Club**
- **Follow-up email invitations are sent from the Chairman**
- **Segmented and tailored follow-up email invitation**
- **Information about Chairman's Club in national magazine and Annual Report**
- **Email push for FH Day of Giving in spring**
- **Final push before end of fiscal year**



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The Ask: External Comm.



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Enhance Other Stewardship

- Personalized thank you letter at time of gift
- Personal thank you call by Foundation Trustees
- Hand-signed holiday card in December
- Valentine's Day card in February
- Invitation to special events
- Exclusive VIP webinars to hear insider news about organization
- Thank you call by a select undergraduate member at FLI
- CauseVid personalized videos from students, staff or Trustees
- Thank you email at end of fiscal year



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Promote Special Events

Power of 7 Seminar – next 15th year

- For donors who give \$10,000 or more to FH Excellence Fund
- Invitation to exclusive weekend with Trustees, alumni, spouses, Staff and undergraduates
- Think-tank industry roundtable discussions about current events
- At a resort or unique destination



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Track Donors

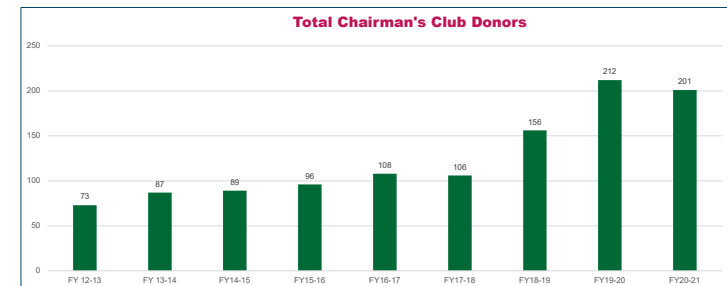
- Throughout the year, the Staff tracks in Compass:
 - Donors who have given
 - Individuals who were invited
 - Past Chairman's Club donors
 - those who said no
- Purpose: to not duplicate requests, thank those who have given in a timely fashion and respect those who decline invitation to join



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Measure Results



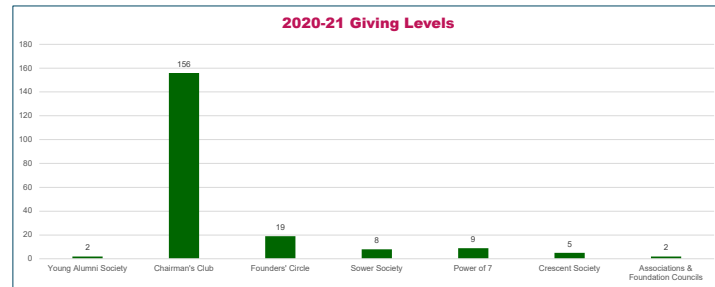
* FY 18-19, Chairman's Club giving level increased from \$700 to \$1,000



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Measure Results



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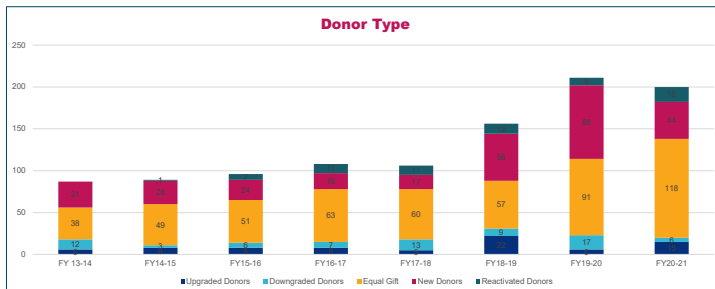
Measure Results

- **Upgraded Donors** – A donor who increased their giving from the year before
- **Downgraded Donors** – A donor who decreased their giving from the year before
- **Equal Gift** – A donor whose giving stayed the same from the year before
- **New Donors** – A new Chairman's Club donor
- **Reactivated Donors** – A donor who has not joined the Chairman's Club in a year or more and re-joined again



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Measure Results



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Measure Results

FINANCIAL RESULTS

- Collectively, donors gave **\$592,366 (92% of total)** to the FH Excellence Fund for FY 2020-21
- **377** have ever joined the Chairman's Club in 9-year history
 - **39** are now deceased
- Average years a donor joins: **3 years**
- Average Annual Retention Rate: **74%**
- Average amount of new donors for a fiscal year: **38**



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Evaluation: Learning Lessons

- Integrating the Chairman's Club into annual fundraising plan
- Annual goal setting and growing Club year after year
- Role of the Foundation Trustees
- Peer to peer asks
- Messaging from Foundation Chairman
- Personalization, selecting and targeting donors
- Setting specific ask amounts
- Upgrading monthly giving donors



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Evaluation: Learning Lessons

- The importance of stewardship
- Special and unique thank you gifts
- Cultivating future and renewing members
- Being able to tell donors how their unrestricted dollars are used
- This group is a handful of committed alumni as small percentage of alumni are Chairman's Club members – treat them as VIPs
- Growing minimum giving level was positive (from \$700 to \$1,000)
- Don't be afraid to ask



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Evaluation: Learning Lessons

- The "Who's Who Directory"
 - donors want to know who else is on the list
- Donors want to be in the know and have a good view of Fraternity – success of Chairman's Club virtual huddles
 - treating them as insiders and investors
- Club concept works – may drive recruitment for members
- Adding data in Compass to make process more systematic
- Keeping a pulse on national and fraternal foundation trends
- Understanding and using the Cygnus data
 - knowing people are willing to give unrestricted donations



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Questions?

Allison Rickels, CFRE
Executive Director & CEO
The FarmHouse Foundation

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