

Virtual Training Series

# Sustaining your VITA Program: Steps for Successful Fundraising

Center on Budget & Policy Priorities

November 16, 2017

Kaylan Somerville  
*Blue Umbrella*



# Virtual Training Series

- Features the expertise of campaign partners in the field
- Focuses on specific outreach strategies and skills that you can begin to apply to your work immediately



# Sustaining your VITA Program

*Steps to successful fundraising*

November 16, 2017



# Agenda

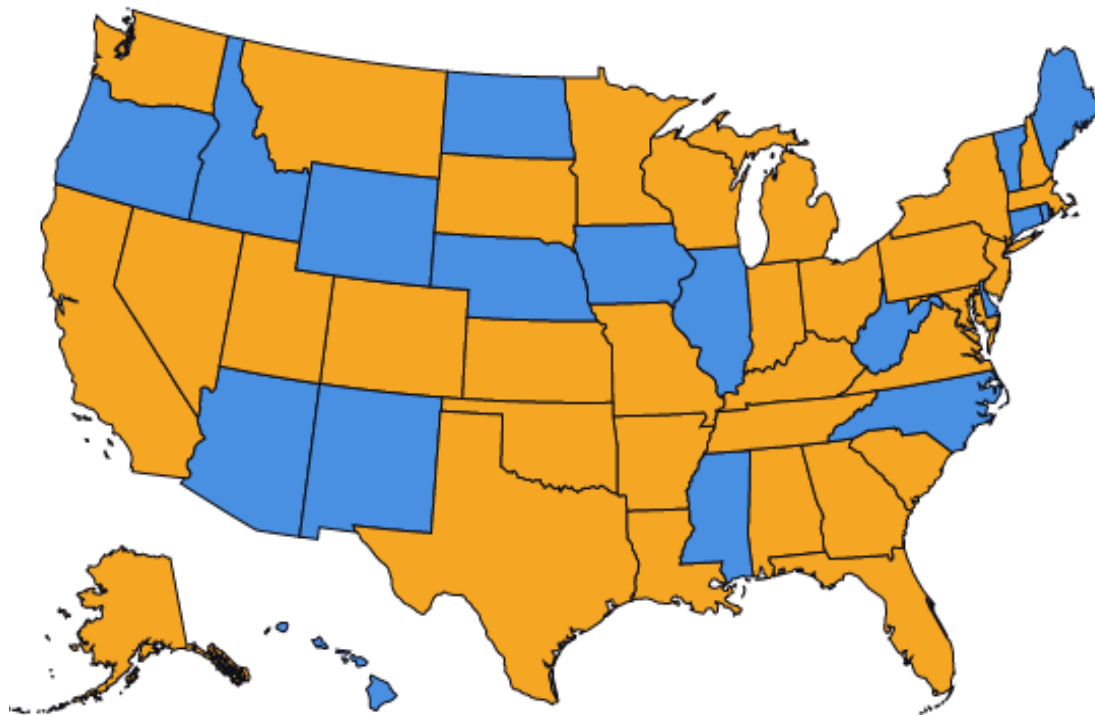


1. Level-set : Establishing a baseline
2. Building a case for support
3. Fundraising in action

# Registration Responses

## Today's Attendees

Currently over 150 program sites and 30 states are represented.



# Registration Responses

## Revenue Diversity

Where does your VITA program receive the bulk of its charitable revenue?



**53%**

Grants

**27%**

Individuals

**20%**

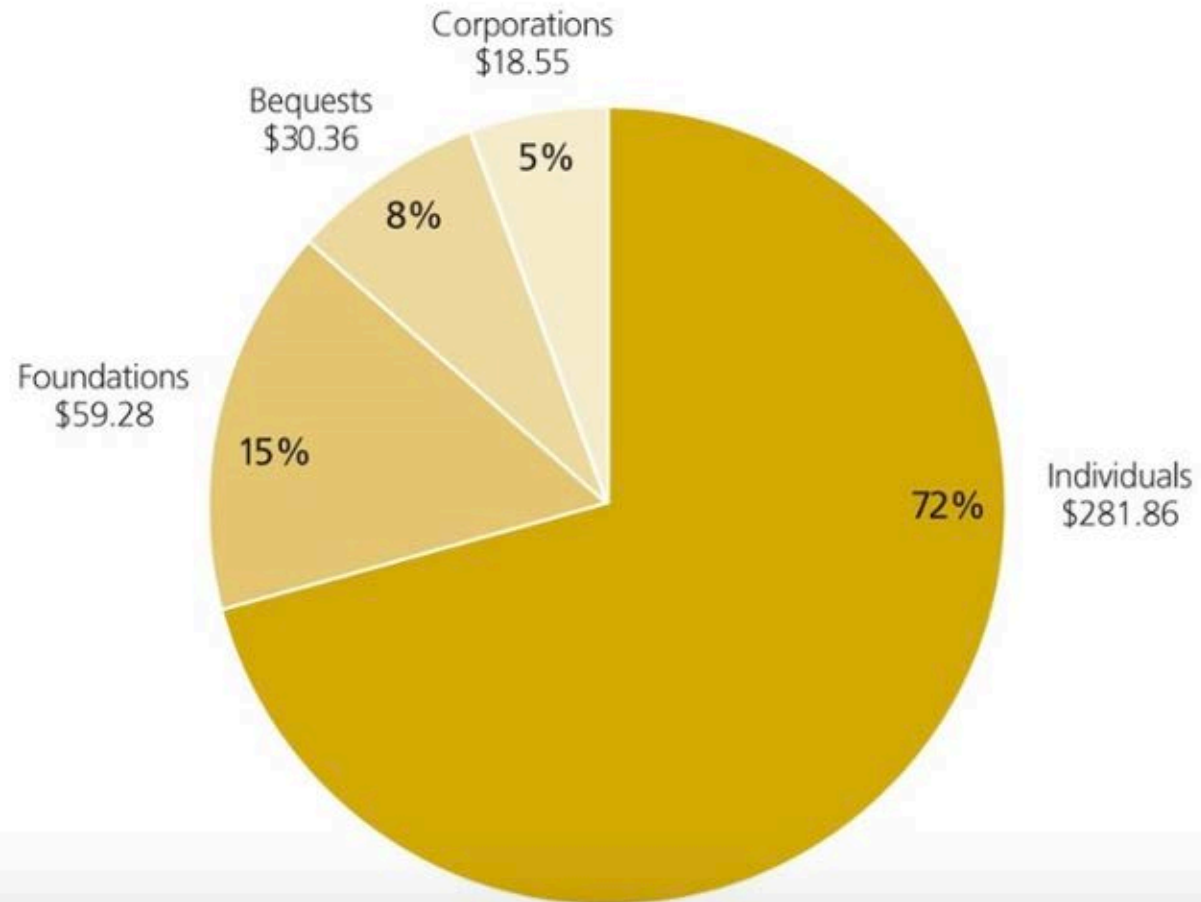
Not Sure

# Poll Question

**What is or job function?**

# Giving in the USA

2016 contributions: \$390.05 billion by source (in billions of dollars—all figures are rounded)

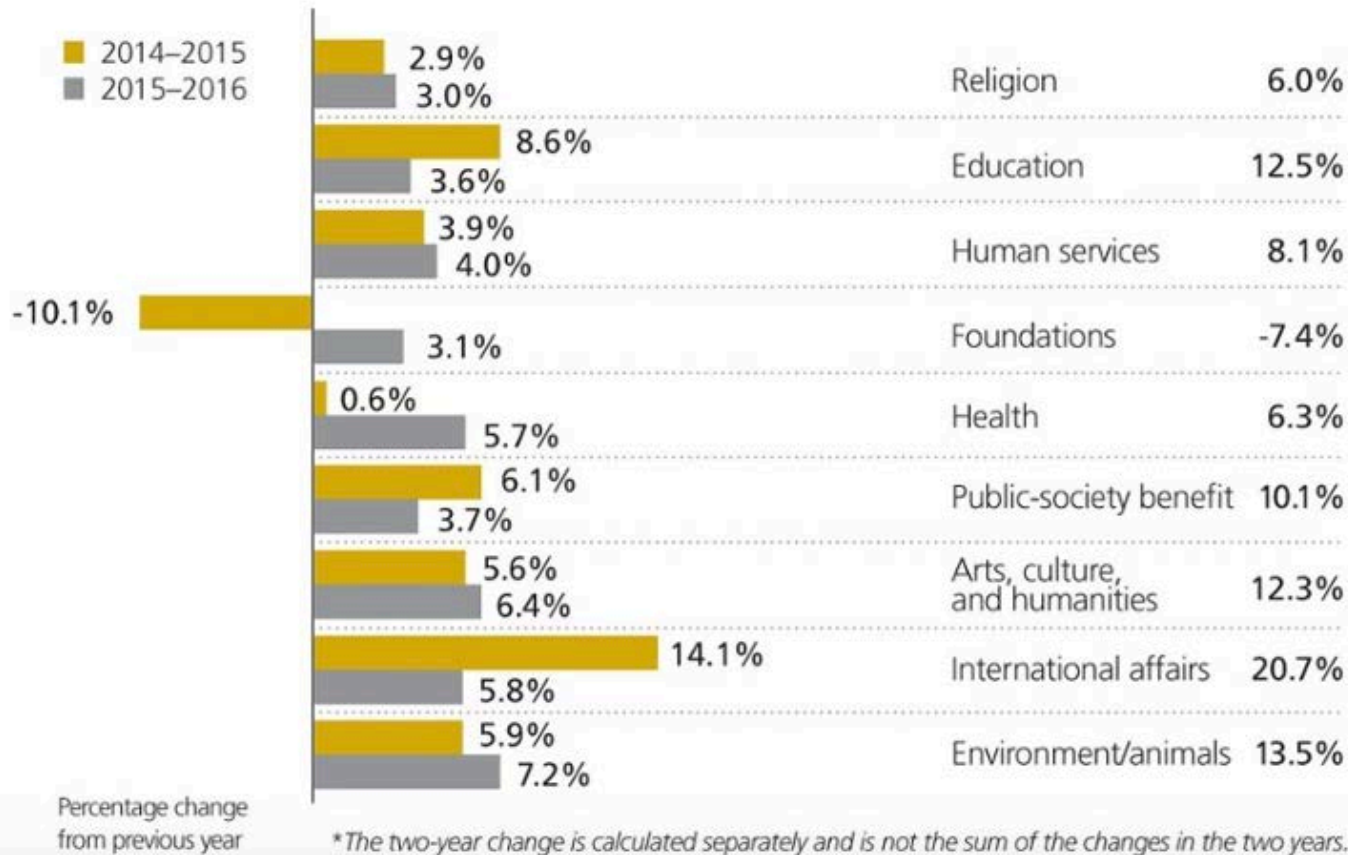


*Giving USA 2017: The Annual Report on Philanthropy* was released to the public Tuesday, June 13, 2017.



# Giving in the USA

Changes in giving by type of recipient organization, 2014-2015, 2015-2016, and 2014-2016 (in current dollars)



*Giving USA 2017: The Annual Report on Philanthropy* was released to the public Tuesday, June 13, 2017.

# Fundraising in Rural Communities



A study done by the Association of Fundraising Professionals and the Indiana School of Philanthropy found that **“for both urban and rural residents, the amount contributed is closely related to some of the same factors that are associated with the probability of giving: being a college graduate, being married, frequency of religious attendance, level of wealth, level of income and itemizing charitable deductions.”**

# Fundraising in Rural Communities

Researchers also found that rural donors share common beliefs and values about charitable giving. They express that:

- 1. Those with more should help those with less (equity of responsibility) — giving is a form of reciprocity for benefits received**
- 2. Giving is a way to express religious beliefs**
- 3. Nonprofit organizations are more effective in delivering services than government agencies.**

# The VITA Story



# Social Media Tips

**1. Include text instructions within photos, videos and captions. This is the easiest way for your followers to participate in fundraising campaigns.**

**Tip:** Double response rates in videos by instructing viewers to either text your keyword or go to your website to take action!

**2. Give shout outs to influencers, donors, volunteers and event guests by tagging them in posts and including @usernames. These individuals will receive a notification that they've been tagged by your organization.**

**Tip:** Take advantage of every photo opportunity when your donors are interacting with your mission!

**3. Create a toolbox of photos and short videos and encourage your volunteers to post them to their Instagram and Facebook pages to promote fundraising, crowdfunding and awareness campaigns.**

**Tip:** The more you coach, inspire and motivate your volunteers, the more likely they will reach their peer-to-peer fundraising goals.

# Social Media Tips

**4. Encourage program participants to include your organization's @username (and or #hashtag) on pictures and videos that pertain to your mission.**

**Tip:** Follow individuals that are involved in your mission and in return they will usually follow your organization's page.

**5. Have your Executive Director record a short thank you video after your campaign has ended and tag donors in your post.**

**Tip:** Post video and photo updates along the way as you achieve campaign milestones of 25%, 50%, 75% and 100%. And be sure to acknowledge donors along the way.



Need PR or marketing? Do an interview for your local paper or news station. For analytics about your target audience or best channels to invest in paid media, consider [Meltwater.com](https://www.meltwater.com)



# Who does it well?



**Kiva**  @Kiva · Oct 30

One start has many ends.



1



6



18



# Who does it well?



**122 Million**  
children's lives saved since 1990

**ANNUAL  
LETTER**

[gatesletter.com](http://gatesletter.com)



# Who does it well?



**Open Society** @OpenSociety · Nov 11  
Com DefeZap você pode vigia os vigias do Rio.

[Translate from Portuguese](#)



## **O Novo Jeito dos Smart Phones para parar a violência policial**

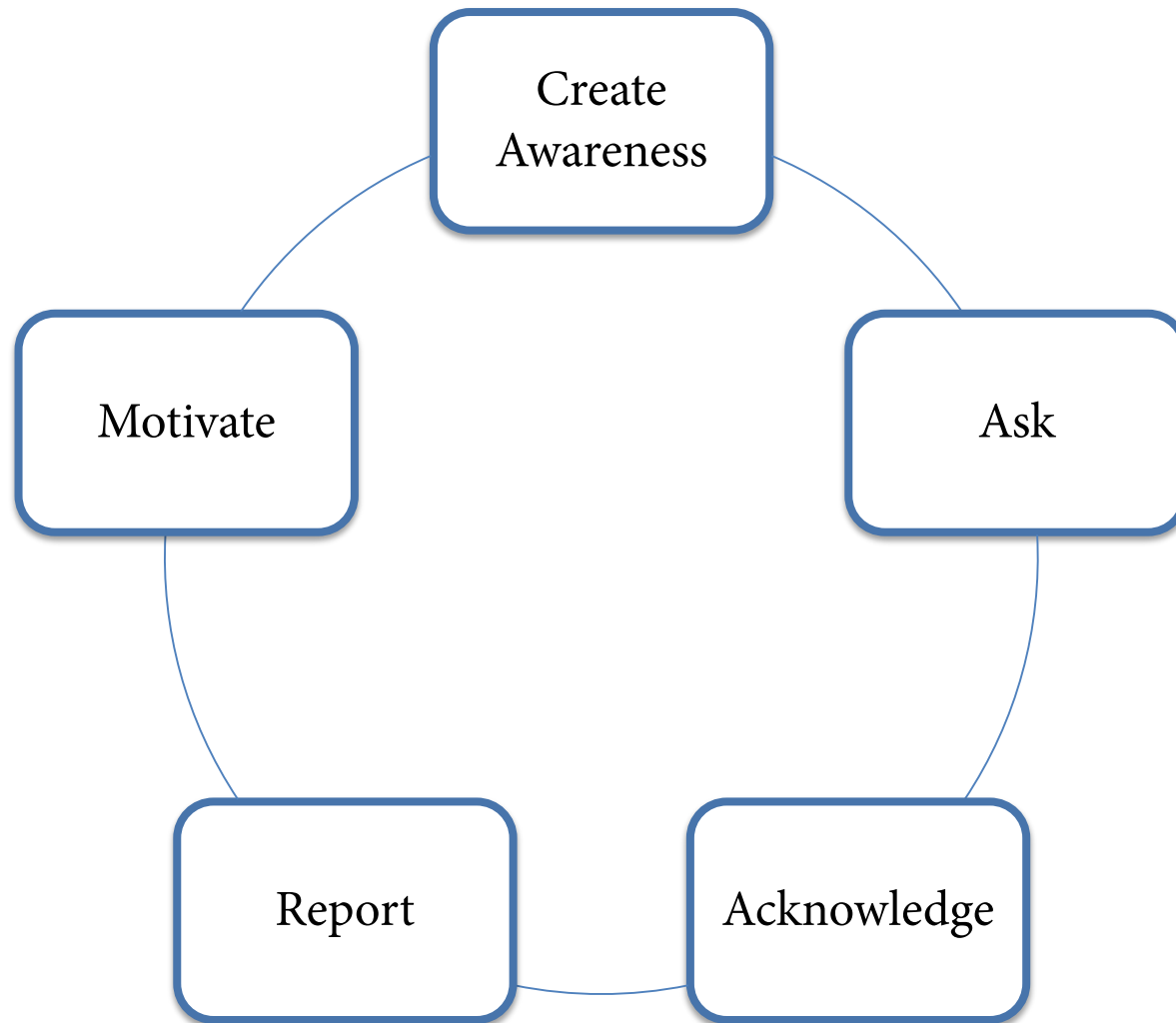
DefeZap reúne e cataloga vídeos de violência policial registrados por brasileiros e depois se certifica de que as providências sejam tomadas ...

[opensocietyfoundations.org](https://opensocietyfoundations.org)

# Poll Question

**What are your fundraising challenges?**

# From Awareness to the Ask



# Engaged Citizens Award

**<https://engagedcitiesaward.citiesofservice.org/>**

Each year, the Cities of Service Engaged Cities Award will elevate city-led strategies that most successfully engage citizens to help create and implement solutions to pressing local problems.

Cities of Service knows that many cities around the world are involving citizens in creative and effective ways, including civic tech, data analysis, impact volunteering, and more. These cities are combining the reach of City Hall with the on-the-ground knowledge of citizens to solve public problems.

**Application deadline: January 5, 2018**

# Public Welfare Foundation

*Do you partner with any organizations that help advocate for low to moderate income employees? Are you a part of a continuum of services for a workforce program?*

The Foundation's Workers' Rights Program supports policy and system reforms to improve the lives of low-wage working people in the United States, with a focus on securing their basic legal rights to safe, healthy, and fair conditions at work. Specifically, the Program makes grants to groups working to:

1. Advance reforms to hold employers accountable for wage theft;
2. Advance reforms to prevent severe illness, injury, and death on the job; and
3. Develop new solutions to diminish barriers to meaningful private enforcement of fundamental workplace protections.

**<http://www.publicwelfare.org/workers-rights/>**

# The Hearst Foundation

The Hearst Foundation funds direct-service organizations that tackle the roots of chronic poverty by applying effective solutions to the most challenging social and economic problems. The Foundations prioritize supporting programs that have proven successful in facilitating economic independence and in strengthening families. Preference is also given to programs with the potential to scale productive practices in order to reach more people in need.

**<https://www.hearstfdn.org/>**



# THE Brown Foundation, INC.

[Home](#)[Background](#)[Guidelines](#)[FAQs](#)[Annual Report](#)[Contact](#)

## About The Brown Foundation

The purpose of **The Brown Foundation, Inc.** is to distribute funds for public charitable purposes, principally for support, encouragement and assistance to education, the arts and community service.

[Annual Report 2016](#)[Grant Proposal Guidelines](#)

# Regional Association of Grantmakers

## **Forum of RAGS (Regional Associations of Grantmakers)**

Forum of RAGS is a national network of local leaders and organizations across the United States that support effective charitable giving. Collectively, these regional associations represent more than 4,000 grant makers and others interested in philanthropy.



# Finding the Top Grantmakers in your area

## GET STARTED

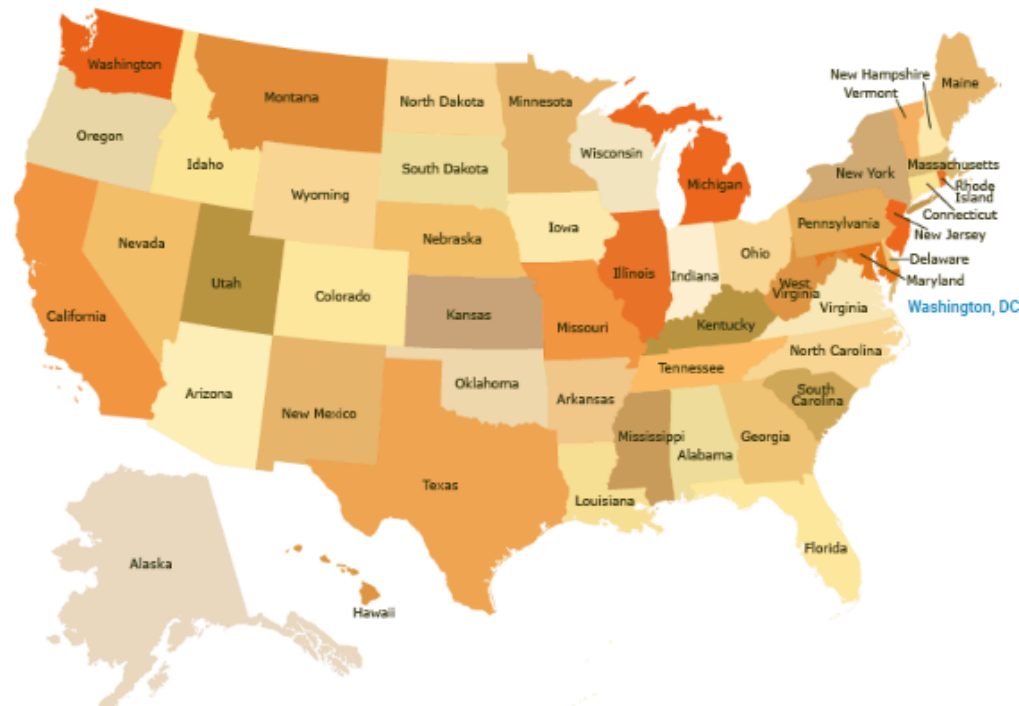
Funding State-by-State is just one of many free resources we offer. Check the map below for grantmakers in your area. Don't stop there! Check out the free article on our home page: "[Where's the Money? Find the Right Funding.](#)" Read our [blog posts](#) and [archived articles](#)—they're loaded with the best thinking and how-to information collected from over 45 years of helping people build better communities.

Click on a state below for information specific to that state's

- Top grantmaking foundations
- Community foundations
- Corporate giving programs
- State website homepage

**The Grantmanship Center**

<https://www.tgci.com/funding-sources>



# Midwest Regional Funding Resources

## ILLINOIS

### Forefront

Forefront is an association of Chicago-area grantmakers promoting effective and responsive philanthropy.

## INDIANA

### Indiana Nonprofit Resource Network

The Indiana Nonprofit Resource Network (INRN) is a statewide service providing affordable, high-quality workshops and board retreats for any Indiana nonprofit organization. INRN is coordinated by the Indiana Association of United Ways and has received generous funding from Lilly Endowment since 1994.

### The Indiana Philanthropy Alliance

The Indiana Philanthropy Alliance is a statewide membership association for foundations and corporate giving programs.

## MICHIGAN

### The Council of Michigan Foundations

The Council of Michigan Foundations is a nonprofit membership association of foundations and corporations making grants for charitable purposes.

### Michigan League of Human Services

Michigan League of Human Services disseminates research and information concerning individuals and charitable organizations engaged in public or private welfare work.

### Michigan Nonprofit Association

Michigan Nonprofit Association provides direct advocacy and services to local nonprofit organizations by hosting workshops on nonprofit management, legal issues, volunteer management, board development, and lobbying.

# Midwest Regional Funding Resources

## MINNESOTA

### **The Minnesota Council of Nonprofits**

The Minnesota Council of Nonprofits works to increase the capacity and effectiveness of nonprofits and the nonprofit sector through publications, workshops, and updates on management trends for the nonprofit sector.

### **The Minnesota Council on Foundations**

The Minnesota Council on Foundations serves a membership of grantmakers by strengthening and increasing participation in organized philanthropy.

## OHIO

### **Ohio Association of Nonprofit Organizations**

Ohio Association of Nonprofit Organizations provides leadership, education, and advocacy to enhance the ability of Ohio's nonprofit organizations.

### **Philanthropy Ohio**

Philanthropy Ohio is committed to public policy, building understanding between the grantmaking and grantseeking communities, and strengthening philanthropy.

# Fundraising in Action: Individuals

What are the most effective ways to solicit individuals?

- Personal (face-to-face) meeting
  - Team of two
  - Solo
- Personal letter (on personal stationery)
  - With telephone follow up
  - Without telephone follow up
- Personal telephone call
  - With letter follow up
  - Without letter follow up
- Personal email message
- Personal phone-a-thon call
- Impersonal letter, direct mail or email
- Impersonal telemarketing call
- Fundraising benefit/special event
- Door-to-door canvassing
- Media/advertising/Internet

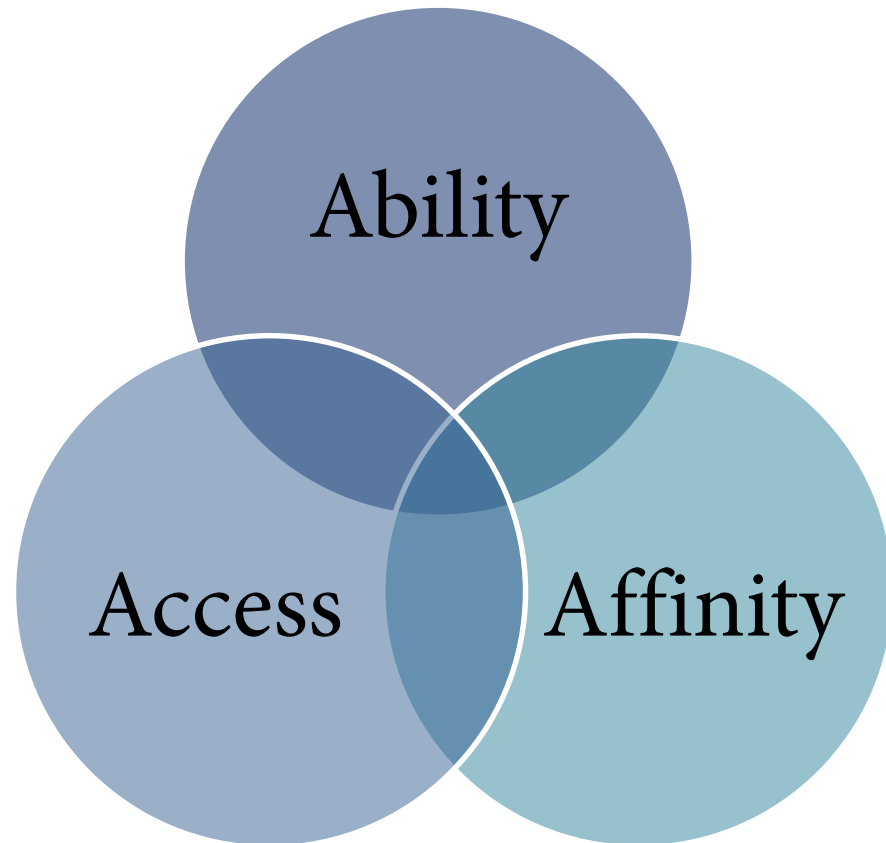


# Make your list and check it twice!

\$25,000 Fundraising Goal			
Gift Level	#Gifts Required	#Prospects Required	Total Revenue
\$5,000.00	1	5	\$5,000.00
\$2,500.00	3	15	\$7,500.00
\$1,000.00	5	25	\$5,000.00
\$500.00	10	50	\$5,000.00
\$100.00	20	100	\$2,000.00
\$50.00	40	200	\$2,000.00
TOTAL			\$26,500.00

# Prospect Qualities

Make a list of individuals that have these qualities. Segment them by potential gift level.



# How to get a meeting

- “Can I run something by you?”
- “I have a new project up my sleeve and I’d love to get your advice about it.”
- “I’d like to get some input from you about . . .
- “We want to get your take on something we are working on.”
- “Can I brainstorm with you about . . .”
- “I’d like to get your advice on . . . and would love your help with it.”
- “We are trying to figure out a way to do xxxx. I’d love to get your input!”
- “Could I get your ideas on a new initiative we are thinking of launching?”
- “We’d like your input on a project we’re planning.”
- “I’d like to give you a sneak peek at our plan for X.”
- “I’ll be in your area, can I drop by?”
- “We want to thank you personally for your gift and share with you more about the project you are helping to fund.”
- Drop off a little thank you present.
- “I’d love to hear why you chose to give.”
- “Would you be willing to have coffee with me, I’d love to understand your story.”
- “Mr. Jones, you’ve been a donor all these years. My job is to know our patrons.”

# Non-Competitive Fundraising Strategies



1. Do a Thank-a-thon to VITA donors and volunteers
2. Send a year-end letter to sponsor a family
3. Send holiday cards or an electronic message
4. Host a holiday party
5. Place a thermometer at a program site or pledge cards on the tables at programmatic events




# Fundraising in Action: Corporations

## TOP COMPANIES WITH MATCHING GIFT PROGRAMS

- **Johnson & Johnson**The healthcare company based in New Jersey matches donations to nonprofits starting at \$25 and goes all the way up to \$20,000. Part-time and full-time employees are eligible to have their gifts matched at a 2:1 ratio, while retirees can have their donations doubled at a 1:1 ratio.
- **Soros Fund Management**This U.S. investment management firm knows how to match employee donations! Like Johnson & Johnson, the minimum donation is only \$25, and Soros caps matched donations at \$100,000 (employee and partner contributions). Employee donations are matched at a 3:1 ratio, while partner contributions are matched at a 2:1 ratio.
- **The Ford Foundation**Founded in the 1930s by father and son duo Henry and Edsel Ford, the Ford Foundation seeks to improve human welfare. One of the ways they accomplish this mission is by offering their employees a generous matching gift program. Although retirees are not eligible, part-time and full-time employees can have donations ranging from \$25 to \$30,000 matched at a 3:1 ratio.

# Fundraising in Action: Corporations



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Who We Are

Our Commitment

Pioneer Giving

Classroom Resources  
Food & Ag Resource Guide  
Community Giving  
The Legacy Project

Investors

Our Brands

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## Community Giving

DuPont Pioneer supports communities in which our employees and customers live and work. Eligible community organizations include local schools, public charities, and 501c3 organizations.

DuPont Pioneer's Giving Program provides up to \$5,000 for a project or program which focuses on the following:

1. **PreK to 12 education** (e.g., support of literacy programs, science fairs, supplies for science classrooms, teaching gardens and greenhouses, support of local FFA and 4H programs)
2. **Food security** (e.g., support of school to home backpack meal programs, food banks, rural meal delivery, congregate meal programs, meals on wheels programs, community gardens)
3. **Community betterment** (e.g., programs and projects that create sustainable infrastructure to benefit communities in which our employees and customers live and work)

The DuPont Pioneer Giving Program does not provide support for: endowment or capital campaigns; state level 4H, FFA, and adult education organizations; gifts to universities, university research, dues and memberships; conference sponsorships; individuals; political candidates; sports teams; or direct talent recruitment.

U.S. nonprofit organizations: organizations not eligible for support under the federal IRS code; disease-specific organizations; endowments; fraternal and veterans groups; individuals; political organizations and campaigns; sectarian organizations whose programs are limited to members of one religious group; or organizations that discriminate based on age, race, religion, color, gender, disability, national origin, ancestry, marital status, sexual orientation or veteran status.

Contact your local DuPont Pioneer Representative for more information.

# Fundraising in Action: Corporations



**ADRIAN  
COLLEGE**

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## Matching Gifts

[Overview](#)[Online Giving](#)[Planned Giving](#)[Tax Benefits](#)[Matching Gifts](#)

Add even more value to your gift.

Matching gifts provide you with an easy way to potentially double, if not triple, your original donation! Many organizations supplement their employees' contributions to institutions of higher education (specifications of the match vary based upon each organization). In fact, your company, a spouse's company, the company whose board you serve or even a company that you retired from may match your gift.

If you are not sure if you qualify for a matching gift, please use the company search below. The tool will provide you with information regarding minimum and maximum match, as well as steps on how to get started.

**See if your employer will match your donation!**

Enter your company name:



# Matching Gifts

## Top Matching Gift Companies

### List of Companies with Donation Matching Programs

MATCHING GIFT COMPANY	MATCH RATIO	MAX MATCH AMOUNT
General Electric	1:1	\$25,000
Soros Fund Management	Up to 3:1	\$300,000
BP (British Petroleum)	1:1	\$5,000
Gap Corporation	1:1	\$10,000
State Street Corporation	1:1	\$35,000
ExxonMobil	Up to 3:1	\$22,500
CarMax	1:1	\$10,000
Johnson & Johnson	Up to 2:1	\$20,000
Boeing	Up to 1:1	\$6,000

# Volunteer Grants

## List of Top Volunteer Grant Companies

Companies providing generous grants to nonprofits when employees volunteer

VOLUNTEER GRANT COMPANY	MINIMUM HOURS	VOLUNTEER GRANT AMOUNT	MATCHING GIFT PROGRAM ALSO OFFERED
ExxonMobil	20 Hours	\$500 for every 20 hours (Max \$2,000)	✓
Aetna	20 hours	\$300 for every 20 hours	✓
Outerwall (Coinstar / Redbox)	10 Hours	\$15 per hour	✓
Verizon	50 Hours	\$750 for every 50 hours (Max \$1,500)	✓
ConocoPhillips	20 Hours	\$500 for every 20 hours (Max \$1,000)	✓
Microsoft	No Minimum	\$25 per hour	✓
Dell	10 Hours	\$150 for every 10 hours	✓
RealNetworks	10 Hours	\$15 per hour (Max \$900)	✓
Time Warner and Subsidiaries	30 Hours	\$500	✓

# Local Businesses



1. Who owns the local restaurant?
2. What committee meetings can you attend?
3. What policies can you advocate for that would help local businesses or employees?
4. Is the Rotary, Lion's Club, or other civic organizations active in your community?
5. Who would want to market in your space or sponsor a family during tax season?

# The Banking Industry

The Citibank logo features the word "citibank" in a blue, lowercase, sans-serif font. A red arc is positioned above the "i" and "b".

The TD Bank logo consists of a green square containing the white letters "TD", followed by the word "Bank" in a bold, black, sans-serif font.

The PNC logo features an orange circle with a white stylized "P" inside, followed by the letters "PNC" in a blue, sans-serif font.

The Bank of America logo displays the words "Bank of America" in a blue, sans-serif font, followed by a red and blue striped icon.

The Wells Fargo logo is a red rectangle with the words "WELLS" and "FARGO" stacked vertically in a yellow, serif font.

The Capital One logo features the words "Capital One" in a blue, sans-serif font, with a red swoosh above the "One".





[Home](#) » [Whole Foods Market](#) » [Our Mission & Values](#) » [Commitment to Society](#) » Community Giving

# COMMUNITY GIVING

## Part of the Neighborhood

As a company, we are quite unique. Our stores are not cookie cutter big box-type stores with directives from “corporate” about how to run the business. Each of our stores has a lot of latitude in deciding the best way to operate that individual store to meet the needs of the local community. That makes community giving really special and fun.

## From the stores

Our team members are part of the local community and they are passionate about supporting the local causes that are important to our shoppers and neighbors. First off, it’s a given that each store donates food to area food banks and shelters. We have food; they know how to get it to people who need it. Done. Then several times a year, our stores hold community giving days (otherwise known as “5% Days”) where five percent of that day’s net sales are donated to a local nonprofit or educational organization. The groups that benefit from these 5% Days are as varied as the communities themselves. Last but not least, team members are constantly volunteering their time and expertise to an assortment of local non-profits.





# National Resources

## **Funding Opportunities**

1. [www.grantcraft.org](http://www.grantcraft.org)
2. [www.grantstation.com](http://www.grantstation.com)
3. [www.foundationcenter.org](http://www.foundationcenter.org)
4. Local Community Foundations
5. Local Grantmaking Association
6. Local Government Grants

## **Nonprofit Networks**

1. [www.geofunders.org](http://www.geofunders.org)
2. [www.independentsector.org](http://www.independentsector.org)
3. [www.managementconcepts.com](http://www.managementconcepts.com)
4. [www.nonprofitadvancement.org](http://www.nonprofitadvancement.org)

## **Capacity Building**

1. [www.boardsource.org](http://www.boardsource.org)
2. [www.catchafire.com](http://www.catchafire.com)
3. [www.cen.org](http://www.cen.org)
4. [www.ebase.org](http://www.ebase.org)
5. [www.iknow.org](http://www.iknow.org)
6. [www.innonet.org](http://www.innonet.org)
7. [www.mapfornonprofits.org](http://www.mapfornonprofits.org)
8. [www.missionfish.org](http://www.missionfish.org)
9. [www.networkforgood.org](http://www.networkforgood.org)
10. [www.nonprofitfinancefund.org](http://www.nonprofitfinancefund.org)
11. [www.npgoodpractice.org](http://www.npgoodpractice.org)
12. [www.theschimelode.net](http://www.theschimelode.net)
13. [www.taprootfoundation.org](http://www.taprootfoundation.org)
14. [www.techsoup.org](http://www.techsoup.org)

# Questions?



# Upcoming Trainings

**Thursday, November 30, 12:00pm EDT**

Enterprise Community Partners and Ladder Up will present  
“Leveraging Partnerships to Fundraise for VITA Programs”

**Thursday, December 7, 3:30pm EDT**

Communally (formerly The Benefit Bank) will present “Tax  
Time Solutions for Long-Term Financial Stability.”

[www.eitcoutreach.org/category/blog/events/](http://www.eitcoutreach.org/category/blog/events/)



# Thank you!

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# Thank You for Joining!

## Stay Connected

- Website: [www.eitcoutreach.org](http://www.eitcoutreach.org)
- Blog: [www.eitcoutreach.org/blog](http://www.eitcoutreach.org/blog)
- Facebook: [www.facebook.com/getitbackcampaign](http://www.facebook.com/getitbackcampaign)
- Tax Credit Outreach News: <http://eepurl.com/bo6ra5>
- Email: [eitcoutreach@cbpp.org](mailto:eitcoutreach@cbpp.org)