



Sustaining Your VITA Program: Steps for Successful Fundraising

Presented by the Center on Budget and Policy Priorities' Get It Back Campaign

As a nonprofit organization, you need to raise money for your VITA site. In this training, fundraising executive Kaylan Somerville gives concrete steps to successfully raise money for your VITA site that consider the needs of both established and developing organizations. She also shares how you can strategically fundraise throughout the calendar year.

Agenda

1. Level-set: establishing a baseline
 - Explore giving trends and how those trends can work to the advantage of a VITA site.
2. Building a case for support
 - Explore how to build a donor base and expand your VITA site's reach beyond existing donors.
3. Fundraising in action
 - Identify tactical steps your VITA site can take to improve fundraising.

Who are the webinar attendees?

- Over 150 program sites from 30 different states represented
- 53 percent of programs received the bulk of their revenue from grants, 27 percent received most of funding from individuals, and 20 percent were unsure
- For most VITA staff, fundraising isn't their primary job function—but everyone can play a part in fundraising efforts for a program. VITA staff can leverage what their roles already are to help fundraise for the organization.

Giving in the USA

- **In 2016, 70 percent** (\$281.8 billion) of **all charitable giving came from individuals**
 - Individuals don't just give at church—only about 6 percent of charitable dollars go to religious organizations
 - Public-society benefit organizations and human services programs (VITA programs fall under this umbrella) receive about 18 percent of charitable dollars

Fundraising in Rural Communities

- Factors that increase the likelihood of giving among both urban and rural residents include:
 - Being a college graduate
 - Being married

- Frequency of religious attendance
- Level of wealth and/or income
- Itemizing charitable deductions
- Rural donors share common beliefs and values about charitable giving
 - Those with more should help those with less (equity of responsibility)
 - Often individuals with high rates of religious attendance and/or volunteer service, volunteer with and/or give to multiple organizations
 - Giving to express religious beliefs
 - Nonprofit organizations are more effective in delivering services than government agencies
- Other potential donors in rural communities may include:
 - Seasonal residents or tourists
 - Churches and pre-existing partnerships
 - Families, friends, or college students in areas served by your program
 - **Former locals**—especially in rural areas, where former residents may still have a strong emotional connection to the area even if they no longer have any family ties

The VITA Story

- The best way to grow your donor base is to **tell a compelling story**
- Leverage social media and existing local publications to spread your story, build awareness, and engage donors

Social Media Tips

Social media is inexpensive and a great way of informing the public (and potential donors) of who you are and what you do. Below are some tips on social media best practices:

1. Include captions and text instructions with photos, videos, and captions
 - **Tip:** Double response rates to a video by instructing viewers to text a keyword or go to your website to act
2. Give a shout-out to influencers, donors, volunteers, and event guests by tagging them in posts or including their usernames
 - **Tip:** Take advantage of any photo opportunity when donors are interacting with your mission.
3. Create a toolbox of photos and short videos and encourage your volunteers to post them to their social media
 - **Tip:** Collect positive feedback from volunteer comment sheets to use in your toolbox.
4. Encourage program participants to include your organization's username and any associated hashtags on pictures and videos that pertain to your mission
 - **Tip:** Follow individuals that are involved in your mission

5. Have your Executive Director record a short thank you video at the end of a fundraising campaign and tag donors in your post
6. Do an interview for your local paper or news station.
 - **Tip:** For analytics about your target audience or the best channels to invest in for paid media, consider Meltwater.com, which e-mails out your press release automatically to PR professionals.

[KIVA](#), [The Gates Foundation](#), and [Open Society](#) are great examples

Connecting with Grants

- [United Philanthropy Forum](#) – national network of local leaders and organizations that support charitable giving.
- The Grantsmanship Center – has a [state-by-state search tool](#) that allows you to look up top funders
- When it comes to grant writing, under-promise and over-deliver

Fundraising in Action: Individuals

- Personal (face to face) meeting, either on your own or in a team of two, is the most effective method
- Personal letter (on personal stationary), with or without a telephone follow-up, is the second best
- To secure one donation, you need to reach five prospects that you know well
 - The ideal prospect has ability, access, and affinity to your organization
- To get a meeting, ask a prospect for feedback, input, or advice, keeping meetings to 20 minutes or less

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 tables at programmatic events. Allows guests/individuals to see what your VITA site's goals are, and encourages people to help you move the meter.

Fundraising in Action: Corporations

- Many companies offer matching gift programs—include an ask on your donation card to remind donors their employer may do the same
- Some corporations provide grants for community organizations that operate in their employees' communities
- Many companies offer volunteer grants

Local Businesses

1. Who owns the local businesses?
 - Applying for donations with locally owned businesses tends to be easier, since franchises have more red tape
2. What committee meetings can you attend?
 - This includes the Chamber of Commerce, Lions Clubs, Rotary Clubs, and similar organizations

The Banking Industry

- VITA has a strong relationship with the banking industry
- Banks are always engaging in financial literacy and are interested in helping people access mainstream banking
- Reach out to local credit unions and investment/financial management groups in addition to national banks
- Reach out to banks with bad reputations now (Wells Fargo, e.g.); they're more likely to give as they're eager to repair their image