
A presentation by Bob Demont, President of Demont Associates

2009 Survey of New England Camps

▲ 29 Camps Responded

▲ Types:

▲ YMCAs, Boys, Girls, Co-ed, Religious, 4-H, Day, Overnight, Scouts, Environmental/Outdoor

▲ 21 were 50+ years old

▲ 4 were 100+ years old

▲ Nearly Half Fundraised for 30+ Years
Average Annual Raised vs. Face-to-Face Solicitations

# of Face-to-Face Solicitations

- 0
- 1 to 4
- 5 to 9
- 10 to 24
- 25 to 49
- 50+
Average Annual Raised vs. Phone Solicitations

# of Phone Solicitations

None | 1 to 9 | 10 to 24 | 25 to 49 | 50 to 99 | 100 to 249 | 250 to 499

$0 | $50,000 | $100,000 | $150,000 | $200,000 | $250,000 | $300,000 | $350,000 | $400,000
Average Annual Raised vs. # of Volunteers

# of Volunteers

$0
$50,000
$100,000
$150,000
$200,000
$250,000
$300,000
$350,000
$400,000
$450,000
$500,000

None
1 to 4
5 to 9
10 to 24
25 to 49
50+
The Deep End of Philanthropy

1980

$25K-$50K/Year

Purpose:
Context:
Solicitation Methods:
Fund-Raising Leadership:
Prospect Pool:
Prospect Engagement:
Communication:
Donor Recognition:
Software:
Investment:
Return on Investment:

- Scholarships
- Annual Fund Letters
- Camp Director
- Parent-Alumni Directory
- Camp Visits Letter
- Thank You
- Index Cards • dBase
- Part-Time Alumni/Staff 100%

DEMONTE ASSOCIATES
Maine Summer Camps
Real Kids, Real Camps, Real Maine!
Challenges

Volatility
Uncertainty
Complexity
Ambiguity

Solutions

Vision/Values
Understanding
Clarity
Agility
Plan for the Worst, Do the Tried & True (Agility)

▲ Get Philanthropy Perspective (Macro & Micro)
▲ Get REAL: Update Financial Pro Forma
▲ Engage Your Best Leaders (Interest/Influence)
▲ Develop Menu of Funding Priorities (AG/MG)
Engage Key LEADERS as Advocates to...
(Understanding/Clarity/Agility)

▲ Help Sharpen Messages/Receive Advice/Feedback
▲ Connect/Converse With Donors They Know Well
▲ Clarify Challenges & Opportunities of Organization
▲ Discern If and When They Can Also Help
Clearly and Consistently Focus on Vision and Values (Clarity)

▲ In ALL Communications/Connections

▲ It is About Constituents, Not Your Organization

▲ Get to Know Constituents’ Core Values/Priorities

▲ Model Exemplary Values & Stories (“Data with a Soul”)
Increase Appropriate Donor Contacts
(Agility/Understanding/Clarity)

▲ Ramp Up **Stewardship** Contacts (KF/COA)

▲ People Will Value **Concern/Conversation/Clarity**

▲ **Connection to People/Places Can Help** (Hale/COA)

▲ **PERSONALLY Contact Top Donors (10+)**
Actively/Regularly **Listen** to Constituents (Vision, Understanding, Clarity, Agility)

▲ Timely **Data Is Critical** to Right Next Actions

▲ **Insightful Call Reports Are Critical**

▲ Abandon **Perfectionism** (Professional or Personal)

▲ “**Vulnerability is the Birthplace of Innovation.**” —Brené Brown

▲ Practice **Gratitude.** It is an Action not a Feeling.
Pivoting to ASKING in an Ultra-VUCA Era (March to Sept. ‘20)

▲ Know Your Donors’ Values, Motivations:

▲ Education (14%), Youth/Human Services (12%), Environmental (2%)

▲ People Invest in **Bold Plans, Promising Programs** and **Passionate Leaders**, NOT To Orgs That Need Money

▲ “PRESERVATION vs. “Emergency” Fund
Why Major Gift Focus In Ultra-VUCA?

▲ 95%+ of Money Comes From 4% Donors
▲ 82% Comes from Individuals (Bequests/DAF)
▲ Major Donors Will:
  ▲ Prioritize Giving (Top 3-5 Causes)
  ▲ More Restricted & Focused on Immediate Needs
  ▲ Want to Leverage Their Giving
▲ If You Do Not Ask, Someone Else Will
Today’s Definition of a Major Gift

▲ $10K+ Annual or Single (2020)
▲ $25K+/Multi-year (’20-’21)
▲ Other?
Basic Factors in Timing of Ask

△ Fiscal EOY to Campaign End Date: Sep.’20 to Sep.‘21
△ Goal Size: $250K (Annual) to $25M (Comprehensive)
△ Size of Gift Sought
△ Funding Priorities: Immediate to Long Term
△ Other? Stock Market? Tax Incentives? Uncertainty?
2 Most Important Ask Timing Factors

▲ Prepared PROSPECTS/Culture of Philanthropy:
   ▲ Sustained Stewardship: 3+/Gift
   ▲ One Personal Contact/Digit of the Ask: $10,000 = 5

▲ Trained and Exemplary ASKERS
   ▲ Who Are the Best? Why? Staff? Volunteers?
### Do You Have the Annual Askers (Staff & Volunteers) to Be Successful?

<table>
<thead>
<tr>
<th>Annual Goal</th>
<th>Major Gift</th>
<th>Gifts Needed</th>
<th>Askers Needed</th>
<th>Total</th>
<th>% of Goal</th>
</tr>
</thead>
<tbody>
<tr>
<td>$100K-$250K</td>
<td>$1,000+</td>
<td>25+</td>
<td>5 for 20 prospects</td>
<td>$25K+</td>
<td>25%+</td>
</tr>
<tr>
<td>$250K-$500K</td>
<td>$2,500+</td>
<td>30+</td>
<td>10 for 20 prospects</td>
<td>$100K+</td>
<td>40%+</td>
</tr>
<tr>
<td>$500K+</td>
<td>$5,000+</td>
<td>45+</td>
<td>15 for 30 people</td>
<td>$225K+</td>
<td>45%+</td>
</tr>
<tr>
<td>$1M+</td>
<td>$10,000+</td>
<td>45+</td>
<td>15 for 30 people</td>
<td>$450K+</td>
<td>50%+</td>
</tr>
</tbody>
</table>
### Do You Have Campaign Askers (Staff & Volunteers) to be Successful?

<table>
<thead>
<tr>
<th>Annual Goal</th>
<th>Major Gift</th>
<th>Gifts Needed</th>
<th>Askers Needed</th>
<th>Total</th>
<th>% of Goal</th>
</tr>
</thead>
<tbody>
<tr>
<td>$2.5M+</td>
<td>$10,000+</td>
<td>40+</td>
<td>10 for 30 prospects</td>
<td>$1.85M+</td>
<td>75%+</td>
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<tr>
<td>$5M+</td>
<td>$25,500+</td>
<td>45+</td>
<td>15 for 30 prospects</td>
<td>$3.75M+</td>
<td>75%+</td>
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<tr>
<td>$10M+</td>
<td>$50,000+</td>
<td>60+</td>
<td>15 for 45 people</td>
<td>$8.5M+</td>
<td>85%+</td>
</tr>
<tr>
<td>$25M+</td>
<td>$100,000+</td>
<td>60+</td>
<td>15 for 45 people</td>
<td>$22.5M+</td>
<td>90%+</td>
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</table>
Questions & Discussion

Raise-Hand Button or Chat
Eight Scorable Factors in Determining Major Donor Prospect Ask Readiness:

<table>
<thead>
<tr>
<th>Factor</th>
<th>Points</th>
</tr>
</thead>
<tbody>
<tr>
<td>Has a positive 5—10 yr. relationship with a chief executive or peer volunteer</td>
<td>0—20</td>
</tr>
<tr>
<td>Has been an active Board or committee volunteer for 5—20 yrs. or more</td>
<td>0—20</td>
</tr>
<tr>
<td>Has assumed 5—20 yrs. of recent Board/campaign leadership at the organization</td>
<td>0—20</td>
</tr>
<tr>
<td>Is a current and consistent donor to the organization for 5—20 yrs.</td>
<td>0—20</td>
</tr>
<tr>
<td>Is informed on strategic plan, compelling case, and realistic financial pro forma</td>
<td>0—20</td>
</tr>
<tr>
<td>Confirmed recent interest (in last 30 days) in considering a gift despite VUCA</td>
<td>0—10</td>
</tr>
<tr>
<td>Is aware of 100% Board giving at a collective level perceived to be a “stretch”</td>
<td>0—10</td>
</tr>
<tr>
<td>Is a recently trained and influential solicitor who can ask for other gifts.</td>
<td>0—10</td>
</tr>
</tbody>
</table>

**Bonus Criteria:** Proven ability to make a Top 3 gift and interest in matching gift | 0—20
Demont’s Culture of Philanthropy Evaluation (COPE©)

COPE© Rank Among Best Camps

<table>
<thead>
<tr>
<th>Camp</th>
<th>Overall Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Camp 10</td>
<td>78.14</td>
</tr>
<tr>
<td>Camp 9</td>
<td>82.38</td>
</tr>
<tr>
<td>Camp 8</td>
<td>88.41</td>
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<tr>
<td>Camp 7</td>
<td>89.14</td>
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<td>Camp 6</td>
<td>89.88</td>
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<td>Camp 5</td>
<td>91.95</td>
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<tr>
<td>Camp 4</td>
<td>93.30</td>
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<tr>
<td>Camp 3</td>
<td>94.14</td>
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<tr>
<td>Camp 2</td>
<td>100.76</td>
</tr>
<tr>
<td>Camp 1</td>
<td>100.85</td>
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</table>
Tools & Opportunities

▲ PDF Copy of This Presentation & Handouts
▲ FREE COPE© for Your Camp in 2020. Ask!
▲ Free Copy of “People Give to People”

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