



Philanthropic Counsel... Making a Lasting Difference for Good



Asking for Camp Gifts in an Ultra-VUCA* Era: When? Who? How?

A presentation by Bob Demont, President of Demont Associates

***Giles, Sunnie.** "How VUCA Is Reshaping The Business Environment, And What It Means For Innovation." *Forbes*, Forbes Magazine, 23 May 2018, www.forbes.com/sites/sunniegiles/2018/05/09/how-vuca-is-reshaping-the-business-environment-and-what-it-means-for-innovation/#521c5278eb8d.

2009 Survey of New England Camps

▲ 29 Camps Responded

▲ Types:

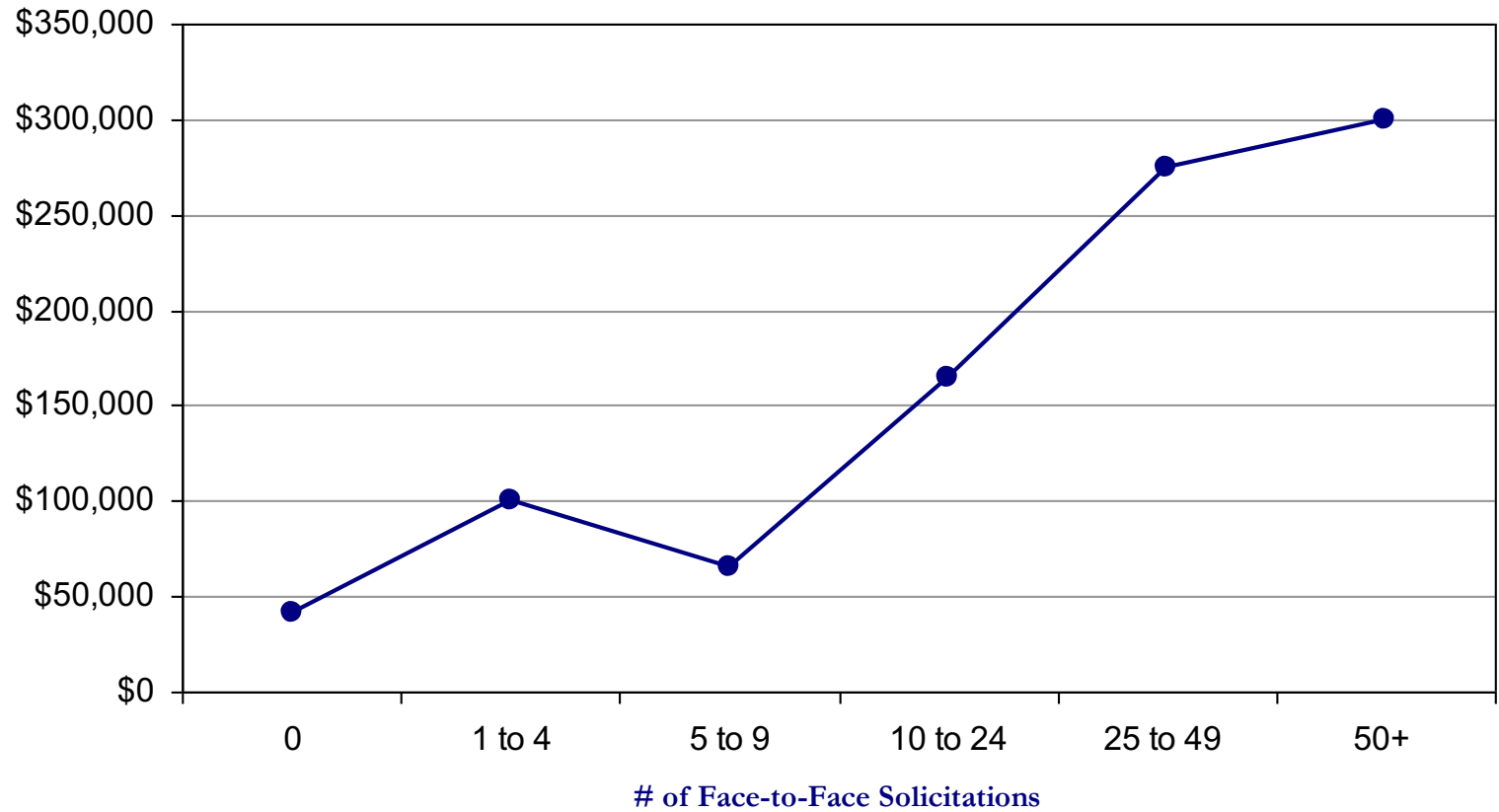
▲ YMCAs, Boys, Girls, Co-ed, Religious, 4-H,
Day, Overnight, Scouts, Environmental/Outdoor

▲ 21 were 50+ years old

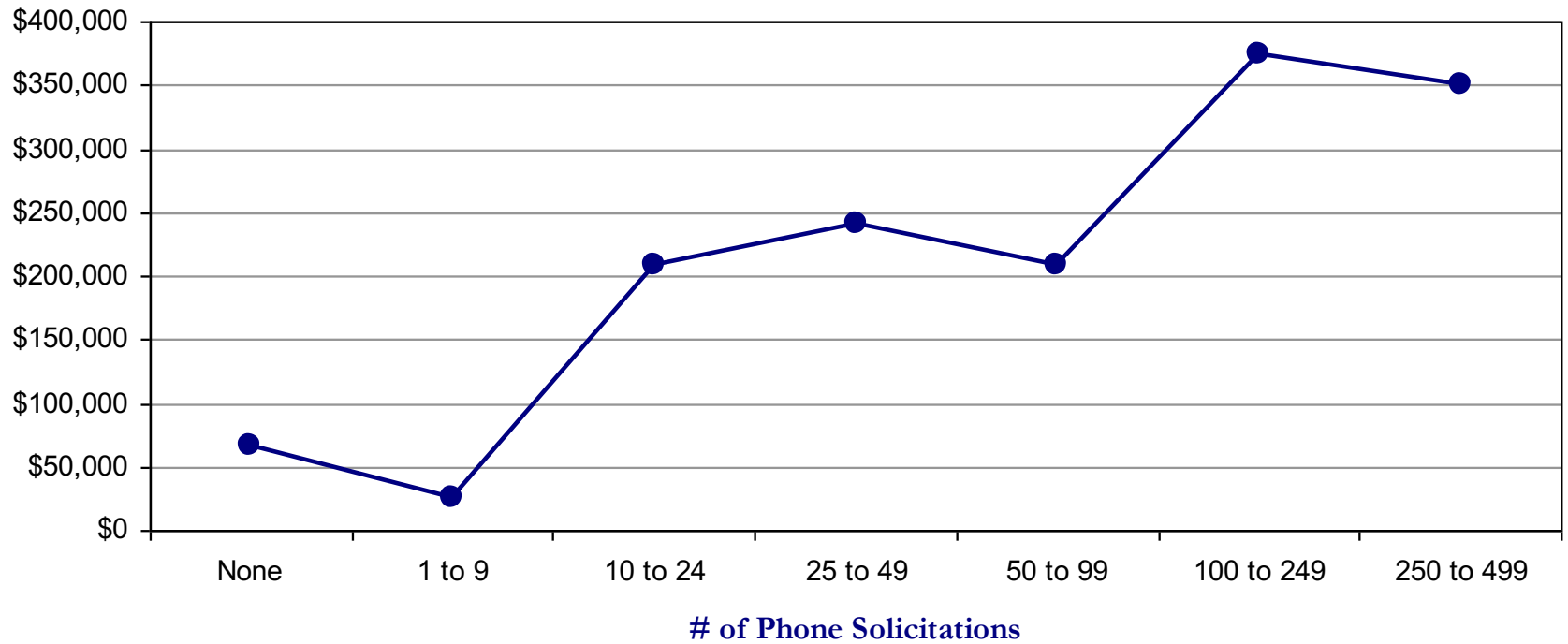
▲ 4 were 100+ years old

▲ Nearly Half Fundraised for 30+ Years

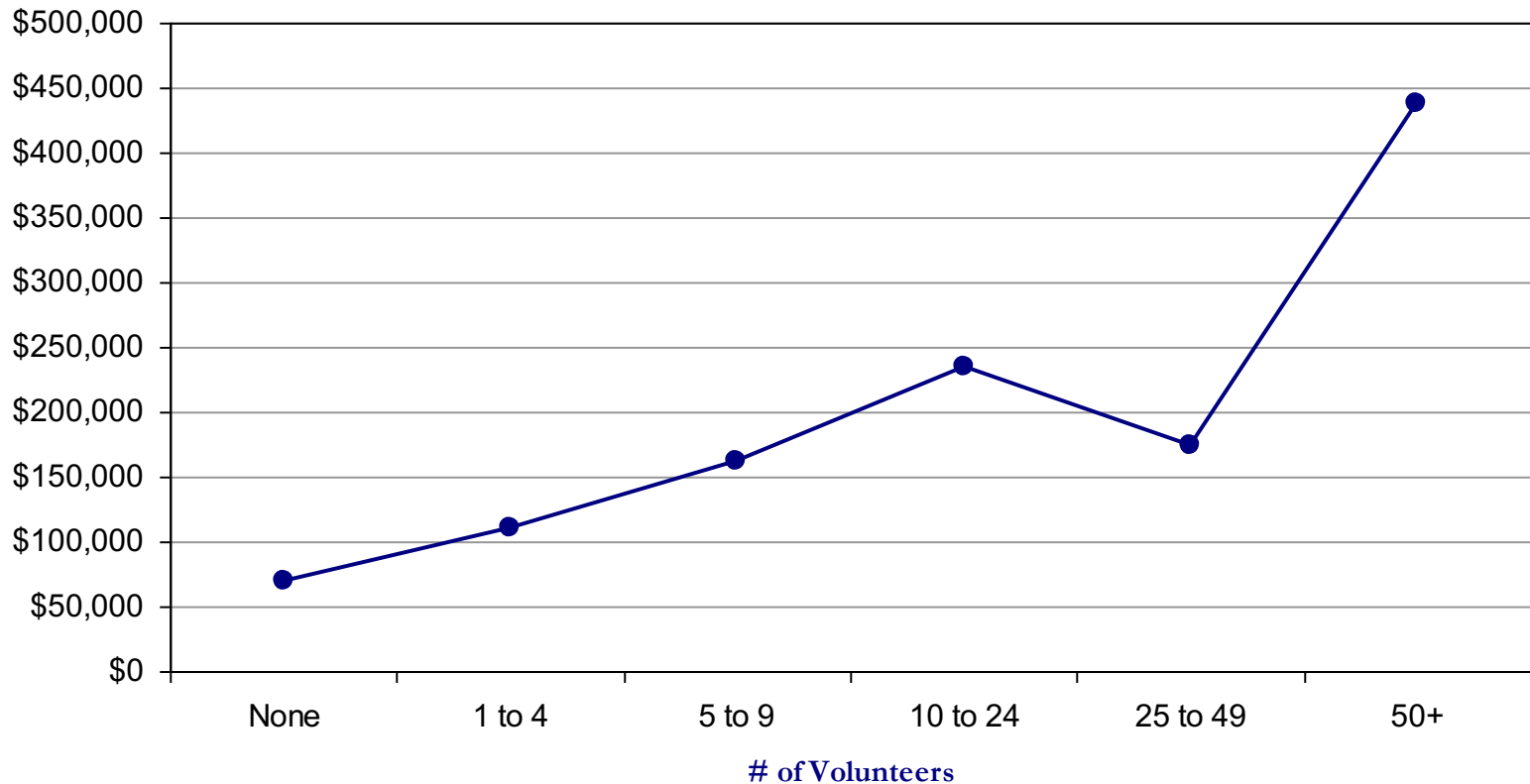
Average Annual Raised vs. Face-to-Face Solicitations



Average Annual Raised vs. Phone Solicitations



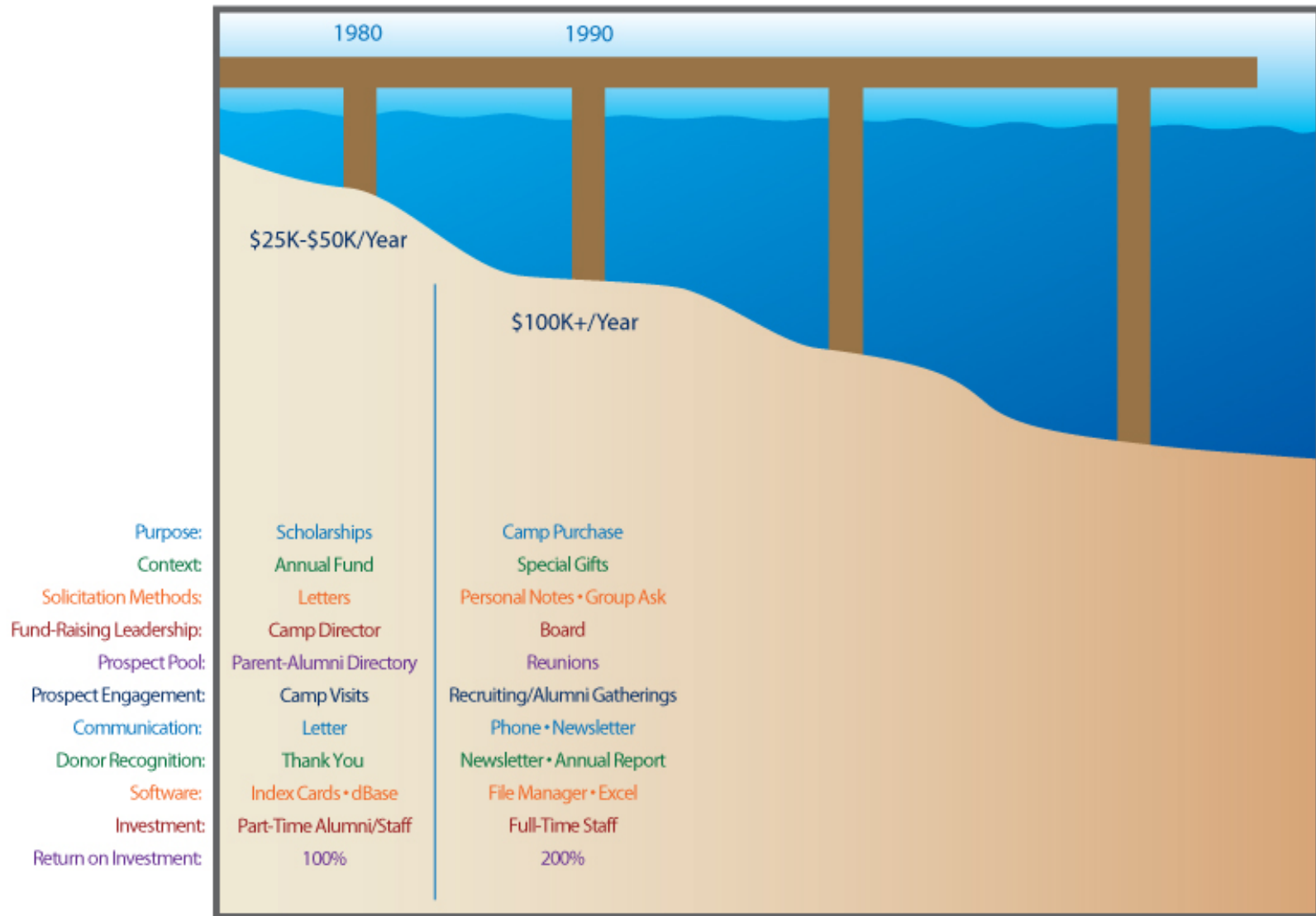
Average Annual Raised vs. # of Volunteers



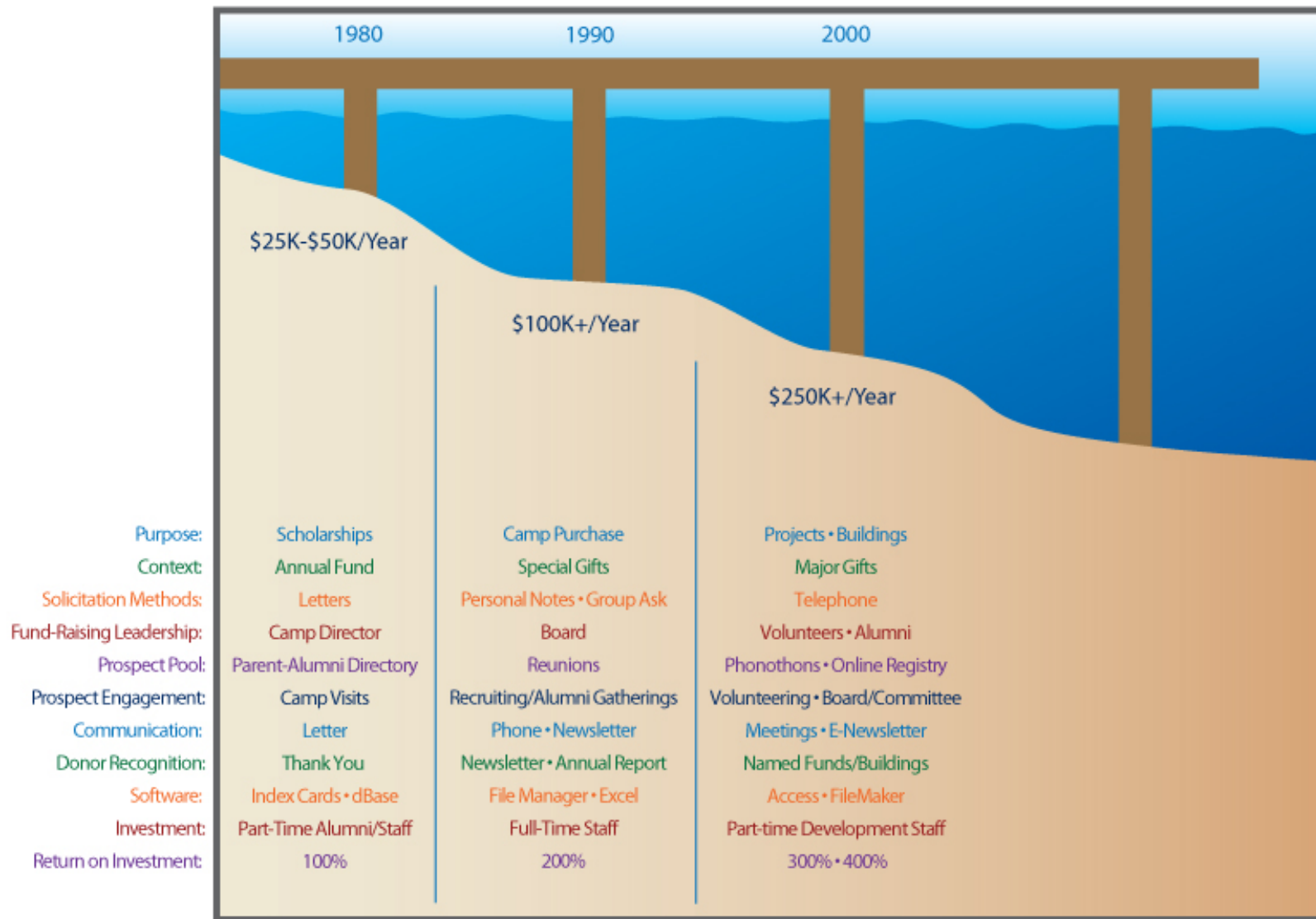
The Deep End of Philanthropy



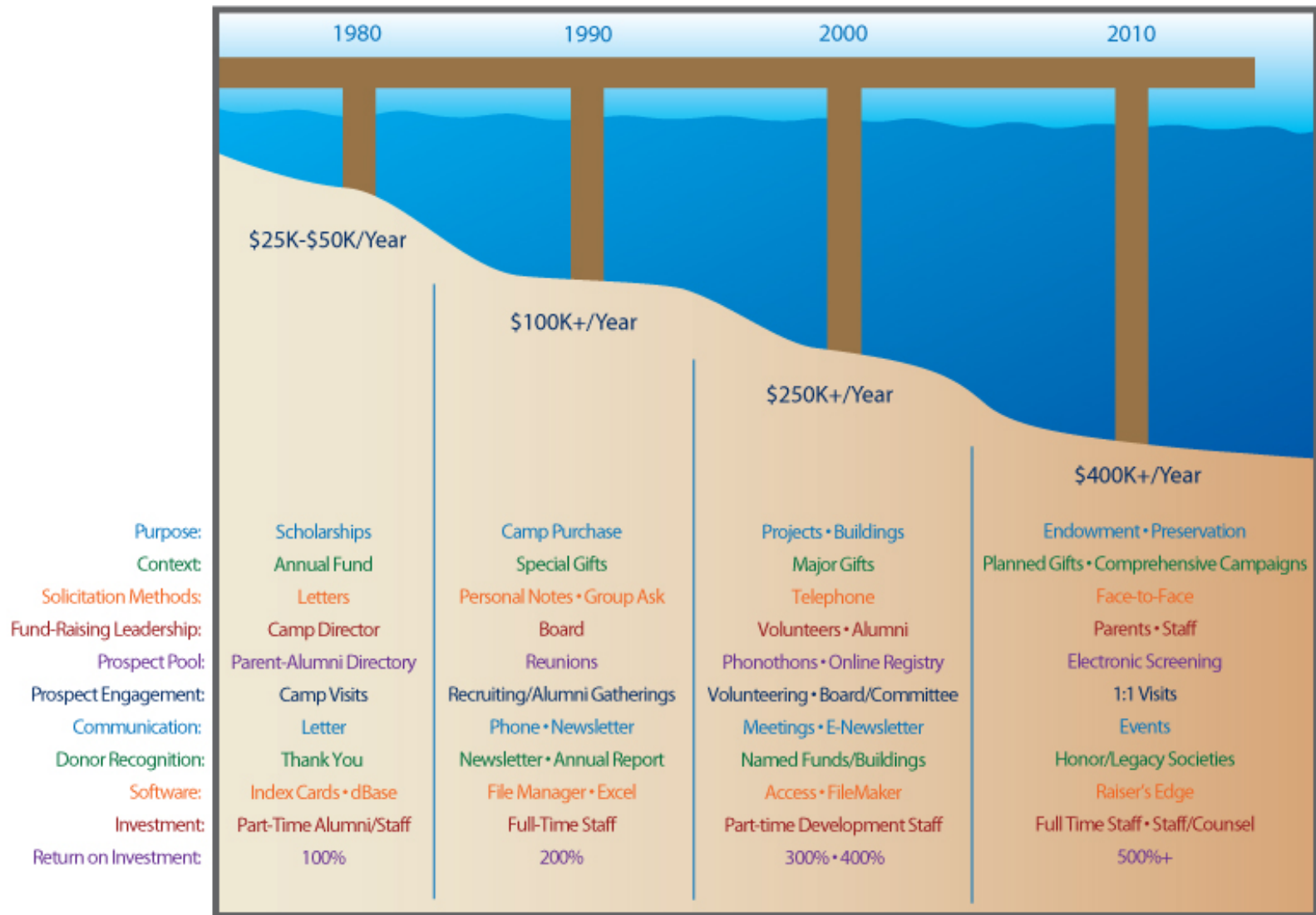
The Deep End of Philanthropy



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The Deep End of Philanthropy



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?

Annual Goal	Major Gift	Gifts Needed	Askers Needed	Total	% of Goal
\$100K-\$250K	\$1,000+	25+	5 for 20 prospects	\$25K+	25%+
\$250K-\$500K	\$2,500+	30+	10 for 20 prospects	\$100K+	40%+
\$500K+	\$5,000+	45+	15 for 30 people	\$225K+	45%+
\$1M+	\$10,000+	45+	15 for 30 people	\$450K+	50%+

Do You Have Campaign Askers (Staff & Volunteers) to be Successful?

Annual Goal	Major Gift	Gifts Needed	Askers Needed	Total	% of Goal
\$2.5M+	\$10,000+	40+	10 for 30 prospects	\$1.85M+	75%+
\$5M+	\$25,500+	45+	15 for 30 prospects	\$3.75M+	75%+
\$10M+	\$50,000+	60+	15 for 45 people	\$8.5M+	85%+
\$25M+	\$100,000+	60+	15 for 45 people	\$22.5M+	90%+

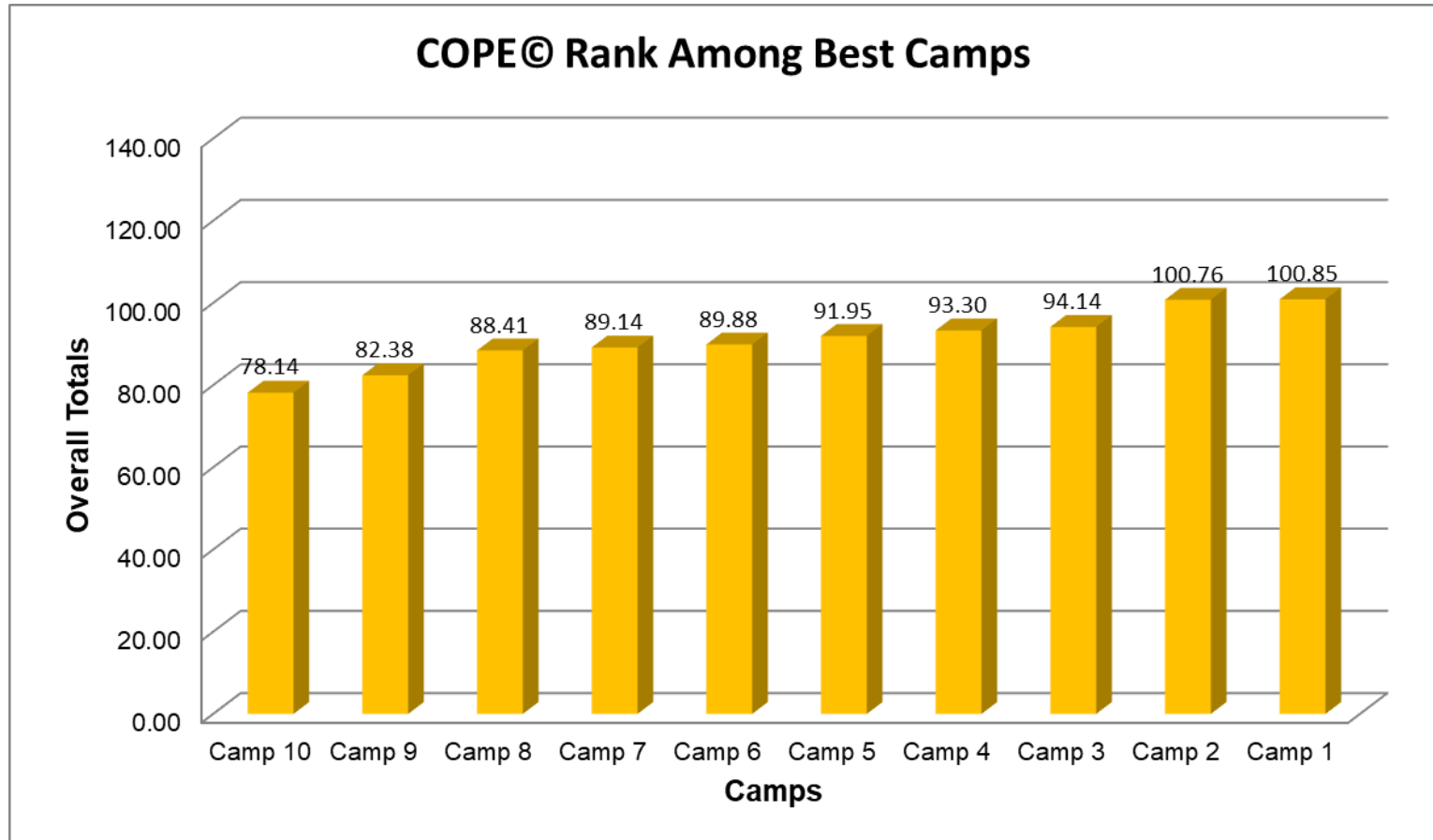
Questions & Discussion

Raise-Hand Button or Chat



<u>Eight Scorable Factors in Determining Major Donor Prospect Ask Readiness:</u>	<u>Points</u>
Has a positive 5—10 yr. relationship with a chief executive or peer volunteer	0—20
Has been an active Board or committee volunteer for 5—20 yrs. or more	0—20
Has assumed 5—20 yrs. of recent Board/campaign leadership at the organization	0—20
Is a current and consistent donor to the organization for 5—20 yrs.	0—20
Is informed on strategic plan, compelling case, and realistic financial pro forma	0—20
Confirmed recent interest (in last 30 days) in considering a gift despite VUCA	0—10
Is aware of 100% Board giving at a collective level perceived to be a “stretch”	0—10
Is a recently trained and influential solicitor who can ask for other gifts.	0—10
Bonus Criteria: Proven ability to make a Top 3 gift and interest in matching gift	0—20

Demont's Culture of Philanthropy Evaluation (COPE©)



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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