



Fundraising 101

grant-writing & beyond

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January 2021

Americans are the most generous

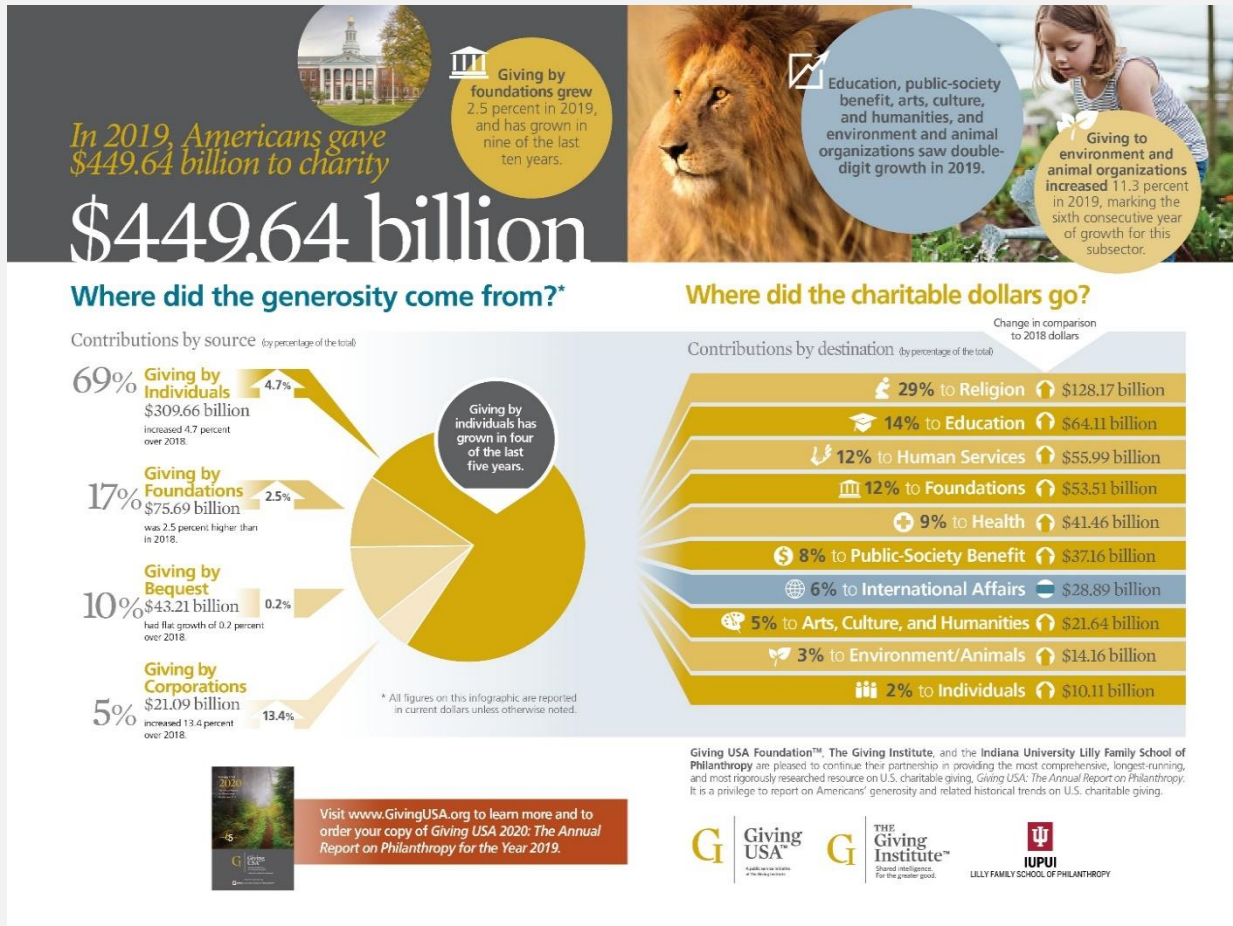
10 most generous countries over the past 10 years

Where people were most likely to help a stranger or donate money or time



Source: Charities Aid Foundation World Giving Index

Americans gave \$450 billion in 2019



- Foundations: 17%
- Corporations: 5%
- Individuals/bequests: 79%

Source: Giving USA

Differences



Individuals

- Typically one point of contact
- Altruistic motivations
- Personal connection to mission
- Information resources: wealth indicators

Corporations & Foundations

- Multiple points of contact
- Shareholder, board, and public accountability
- Customer connection to mission
- Information resources: grantmaker databases

Similarities



Individuals

- Donor identification
- Donor qualification
- Donor cultivation
- Donor solicitation
- Donor appreciation

Corporations & Foundations

- Donor identification
- Donor qualification
- Donor cultivation
- Donor solicitation
- Donor appreciation

Identification



- Who funds *comparable* (not necessarily *similar*) organizations?
 - Service organizations like Rotary, Optimists
 - Disaster relief organizations like American Red Cross
- Major corporations in your region
- Who knows who? (six degrees of separation)
 - Where are VFW & Auxiliary members employed?

Identification



- Subscribe to local/regional Business publications (or check them out at the public library). North Carolina examples:
 - Charlotte Business Journal www.bizjournals.com/charlotte
 - Triad Business Journal (Greensboro) www.bizjournals.com/triad
 - Triangle Business Journal (Raleigh) www.bizjournals.com/triangle/
- Corporate - Foundation research tools
 - Local librarians are a valuable resource, may have subscriptions
 - For assistance contact Jason Couch: jcouch@vfw.org
 - Home Depot grant
 - Corporate and foundation research database

Qualification



- Corporate connections
 - Do they have a commitment to hiring veterans?
 - Are there veterans in leadership positions?
 - How do they leverage Memorial Day, Veterans Day, etc.
- Is there an affinity with:
 - Veterans health and wellness
 - Hunger and homelessness programs
 - Workforce readiness programs

Qualification



- Your Pet Projects – versus –
 - Donor interests and giving history
 - Grantmaker Programs
- Which comes first? (hint: it's NOT your pet project!)
- Identify shared affinity and mutual benefits

- Events (networking)
 - Business Journal Award Luncheons
 - National Philanthropy Day (Association of Fundraising Professionals – see <https://afpglobal.org/chapters>)
 - North Carolina examples:
 - NC Triangle Chapter
 - Western NC Chapter
 - NC Triad Chapter
 - Cape Fear Region Chapter

- Letters of Inquiry/Introduction
 - snail mail can help you stand out (when is the last time you received a *hand-addressed* letter?)
- Phone calls, emails, social media
- Face-to-face meetings
- Site visits

Sometimes it pays to be bold and unapologetic.

(and it is **always** wise to first seek counsel.)

Solicitation



- Proposal development
 - Contact Jason Couch for assistance: jcouch@vfw.org
 - If donor requires a 501(c)3, contact Richard Freiburghouse for assistance: rfreiburghouse@vfw.org
- Submission (aka “The Ask”)
- Follow-up
- Never leave the ball in their court

Congratulations – you got the gift! Now what?

- Send a letter to express your appreciation
- Grant reporting requirements
 - Put structure in place in advance to collect information
 - Put reminders in place & submit reports on time
- Invite key contacts to see programs in action
 - This becomes part of the cultivation process for future gifts and grants

Don't let minor details become major obstacles.

What is minor to you could be major to the donor.

The Five Step Process



North Carolina Community Foundation

www.nccommunityfoundation.org

The NCCF is the single statewide community foundation serving North Carolina.

The NCCF partners with a network of affiliate foundations to provide local resource allocation and community assistance across the state.

An important component of NCCF's mission is to ensure that rural philanthropy has a voice at local, regional and national levels.

Communities - North Carolina Community Foundation

friends of boma charita BOMA Raleigh Durham BOMA Home

https://www.nccommunityfoundation.org/communities

NORTH CAROLINA COMMUNITY FOUNDATION

GET UPDATES FUND ACCESS SEARCH

f t in ig

☰ GIVE NOW

Serving communities across NC since 1988

Home / Communities

- Affiliate foundations
- Other communities served

The Five Step Process



Wake County Community Foundation

The Wake County Community Foundation was founded in 1991 and is led by a local volunteer advisory board that helps build community assets through the creation of permanent endowments, makes grants and leverages leadership – all for the benefit of Wake County.

A screenshot of a web browser displaying the Wake County Community Foundation website. The browser's address bar shows the URL: https://www.nccommunityfoundation.org/communities/northern-piedmont/wake-county. The website header includes the North Carolina Community Foundation logo, navigation links for "GET UPDATES", "FUND ACCESS", and "SEARCH", and social media icons for Facebook, Twitter, LinkedIn, and Instagram. A prominent green "GIVE NOW" button is visible in the top right. The main content area features the title "Wake County Community Foundation" and a sub-header "an affiliate of NORTH CAROLINA COMMUNITY FOUNDATION". Below this, a paragraph of text describes the foundation's mission. To the right of the text is a vertical stack of six teal buttons: "GIVE NOW", "FAMILY OF FUNDS", "APPLY FOR GRANTS", "APPLY FOR SCHOLARSHIPS", "GRANTS AWARDED", and "NEWS".

The Five Step Process



Wake County Community Foundation

- **Step 1: Identification**
- List of officers and board members
- Six degrees of separation
- Who knows who?

A screenshot of a web browser displaying the Wake County Community Foundation website. The browser's address bar shows the URL: https://www.nccommunityfoundation.org/communities/northern-piedmont/wake-county/m. The website header includes a logo on the left and a green "GIVE NOW" button on the right. The main content area is titled "Officers:" and lists the following names: Katie Weeks, President; and La Nica Allison, Secretary. Below this, the section is titled "Board members:" and lists the following names: Randy Cagan; Juan Carlos Erickson; Cameron Flowers; Sarah Gaskill; Ellen Gorham; Michelle Keaton-Barrow; Rebecca Leggett; Ruth Peebles; Peter Roche; Jerry Sayre; and Michael Shaw.

The Five Step Process



Wake County Community Foundation

- **Step 2: Qualification**
- Home page: Family of Funds
- Word search (control F for “find”) **“veterans”**

The screenshot shows a web browser window with the URL <https://www.nccommunityfoundation.org/list-of-funds?community=wake-county-communit>. The page features the NCCF logo and a 'GIVE NOW' button. The main heading is 'List of funds'. Below the heading, there is a breadcrumb trail 'Home / List of funds'. The text on the page reads: 'The NCCF is the only statewide community foundation serving the state of North Carolina. We are a collection of 1,200 permanent, endowed charitable funds created by individuals, families, companies, nonprofit organizations and governmental entities to benefit different charitable organizations and causes throughout North Carolina and beyond.' Below this, it says: 'Review our list of funds to find the right recipient for your charitable objectives, a meaningful tribute, memorial or anniversary or birthday gift.' At the bottom, there is a section titled 'BROWSE ALPHABETICALLY' with a row of buttons for letters A through Z. Below that are three filter sections: 'FILTER BY PROGRAM AREA' with a dropdown menu showing 'Select a Program', 'FILTER BY COMMUNITY' with a dropdown menu showing 'Wake County Community Four', and 'FILTER BY TYPE' with a dropdown menu showing 'Select a Type'.

The Five Step Process



Wake County Community Foundation

Step 2: Qualification

Friends of BOMA Charitable Endowment

“This fund supports charitable uses in Wake and Durham Counties to strengthen and support the local community, the family, education*, and to organizations serving the needs of **veterans**, active military personnel and their families”

* *Voice of Democracy, Patriot’s Pen*

The screenshot shows a web browser window with the URL <https://www.nccommunityfoundation.org/list-of-funds?community=wake-county-communit>. The search bar contains the word "veteran" and shows "1 of 1" results. The page displays a list of funds with the following details:

Fund Name	Description	Action
Frankie Lemmon Foundation Endowment	This fund supports the Frankie Lemmon Foundation.	Give to this fund
Friends of BOMA Charitable Endowment	This fund supports charitable uses in Wake and Durham Counties to strengthen and support the local community, the family, education, and to organizations serving the needs of veterans , active military personnel and their families.	Give to this fund
Fuquay-Varina Technical College Scholarship Endowment	This fund provides scholarships for Fuquay-Varina High School graduates who have pursued a vocational or technical education curriculum in obtaining their high school diploma.	Give to this fund
Glenaire, Inc. Endowment	This fund supports Glenaire, Inc., a continuing care retirement community in Cary, NC.	Give to this fund

The Five Step Process



Hey Google, what the heck is BOMA?

- BOMA stands for Building Owners and Managers Association
- BOMA Raleigh-Durham “About Us” page links to executive board, staff
 - **Step 1: identification**
 - Six degrees of separation
 - Who knows who?

The screenshot shows a web browser window with the URL <https://www.bomaraleighdurham.com/executiveboardandstaff>. The page features the BOMA Raleigh-Durham logo, navigation links for HOME, JOIN, and CONTACT US, and social media icons for Facebook, Twitter, and LinkedIn. A search bar is located in the top right. The main content area is titled "Executive Board & Staff" and includes a sidebar with links to "Executive Board & Staff", "Committees", and "Allied Partners". Three executive board members are displayed with their photos and titles: Amy Carroll, MBA (President), Bob Barton (Vice President), and Winter Lofaro (President-Elect). A cookie consent banner is visible at the bottom of the page.

The Five Step Process



BOMA Raleigh-Durham “About Us” page links to “Committees”

- “Programs” committee hosts bi-monthly luncheons to provide content of interest to BOMA members
- **Step 2: Qualification** – make the connection, schedule a meeting
- Offer to speak on veteran issues relevant to BOMA interests

A screenshot of a web browser window showing search results for the term "veteran" on the website https://www.bomaraleighdurham.com/committees. The browser tabs include "List of funds - North Ca", "friends of boma charita", "BOMA Raleigh Durl", and "BOMA Home". The search bar shows "veteran" and the results indicate "No results". The page content lists four committees: EDUCATION, PROGRAMS, PUBLIC RELATIONS, and GOVERNMENT AFFAIRS, each with a brief description of their focus.

Find on page: No results < > Options

EDUCATION
To promote the educational interests and professional development of commercial real estate property professionals through informative programs and/or seminars on new and relevant topics of interest.

PROGRAMS
To provide entertaining and education programs for our bi-monthly luncheons of interest to the Association members and the commercial real estate industry.

PUBLIC RELATIONS
To market, inform and communicate through internet website, manage social media outlets & content, advertising and public relation issues in conjunction with the executive board members.

GOVERNMENT AFFAIRS
To promote the interests of the commercial real estate industry through legislative analysis, advocacy, and member education. Also, to improve conditions relative to the ownership and management of commercial real estate property.

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The Five Step Process



You get invited to present at BOMA Luncheon Event: if appropriate, recruit VFW and Auxiliary members to attend and support you

- **Steps 1, 2, and 3: Moving from Identification, thru Qualification, toward Cultivation**
 - “Network” to identify and engage those interested in your topic
 - Based on interests identified, invite to a “site visit” – upcoming VFW meeting or event

A screenshot of a web browser displaying the BOMA Raleigh Durham website. The browser's address bar shows the URL "https://www.bomaraleighdurham.com/memberluncheons". The page title is "Member Luncheons". On the left side, there is a navigation menu with links for "Member Luncheons", "Annual Golf Fundraiser", "Community Service", "Fall Event", and "TOBY Awards Banquet". The main content area features a "LUNCHEON TIMELINE" with two entries: "11:30AM TO 12:00PM: NETWORKING, REGISTRATION, & LUNCH BUFFET" and "12:00PM TO 1:00PM: PROGRAM". Below the timeline, there is a note: "*All luncheons follow the timeline above unless otherwise noted and locations vary." The date "October 8, 2019" is displayed, followed by the sponsor "Sponsored by CRC-Response Team 1". The location is "Raleigh Regional Association of Realtors Building, 111 Realtors Way, Cary, NC". The speaker is "Henry Chamberlain, APR, FASAE, CAE", who is the President and Chief Operating Officer of BOMA International. The topic is "Henry will share information on what BOMA International is currently involved in, as well as current issues in Commercial Real Estate." A "Register" link is provided at the bottom of the page.

The Five Step Process



Possible “site visit” events (**Step 3: Cultivation**)

- Interest = veteran health and wellness
 - Event = health screening or educational seminar (partner with Humana or Walgreens for subject matter experts)
- Interest = education, patriotism, local youth
 - Event = something related to Voice of Democracy, Patriot’s Pen, Auxiliary Patriotic Arts Contest

The Five Step Process



Prospect identifies with veteran health and wellness

- Invite to health-related event at your Post
- Watch for opportunity to share info on cost of event/program, evaluate reaction
- **Step 4: Solicitation** (if and when appropriate)
 - “We’re seeking donations to cover costs for future events and engage more veterans. **Would you be willing to join me in supporting the program?**”
 - Resist temptation to fill the silence

The Five Step Process



Prospect supports veteran health and wellness program

Step 5: Appreciation

- Compose personal thank you letter with invitation and details of next event
- Offer to send invitations to others recommended by donor
- Note how we've circled back to **Step 1: Identification**



QUESTIONS?

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