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

1. U.S.
2. Indonesia
3. New Zealand
4. Australia
5. Ireland
6. Canada
7. U.K.
8. Netherlands
9. Sri Lanka
10. Myanmar

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
This **five step process** applies to all areas of fundraising and all types of donors (individuals, corporations, & foundations).

Whether asking for $100, $100,000, or $1 million, the five steps are **always** the same five steps.
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](http://www.bizjournals.com/charlotte)
  • Triad Business Journal (Greensboro) [www.bizjournals.com/triad](http://www.bizjournals.com/triad)
  • Triangle Business Journal (Raleigh) [www.bizjournals.com/triangle/](http://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
Cultivation

• 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
Cultivation

- 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.
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.
The Five Step Process

Wake County Community Foundation

• Step 1: Identification
  • List of officers and board members
  • Six degrees of separation
  • Who knows who?
The Five Step Process

Wake County Community Foundation

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