



Finding and Engaging New Donors

Coalition U **Finding and Engaging New Donors**

Monday, March 24, 2014

12pm – 2pm

Peirce College | 1420 Pine Street | College Hall

Agenda

Opening Remarks

Arun Prabhakaran
UAC Vice President

Panel and Discussion

Moderator

James Mergiotti
Peirce College President

Panelists

Lynn Marie Johnson-Porter
Executive Development, Major Gifts & Clinical Support
Children's Hospital of Philadelphia

Aimee Miller
Senior Vice President and Partner
Fairmount Ventures

Ina Lipman, Esq.
Executive Director
Children's Scholarship Fund Philadelphia

Closing Remarks

Felicia Harris
UAC Marketing Communications Coordinator

Follow @CoalitionU on Twitter!

Tweet your questions and comments using #CoalitionU AND we will respond!



About Coalition U

The Urban Affairs Coalition re-launched its capacity building initiative, Coalition U, in 2014 to help nonprofit organizations strengthen their infrastructure, build capacity, and maximize community impact. Coalition U offers a variety of capacity building seminars and workshops focused on improving nonprofit organizational growth and development to make effective changes in the communities they serve. To learn more about Coalition U, please email us at CoalitionU@uac.org

About the Urban Affairs Coalition

The Urban Affairs Coalition unites government, business, neighborhoods, and individual initiatives to improve the quality of life in the region, build wealth in urban communities, and solve emerging issues. We are a Coalition of 65+ partner organizations, large and small, working on diverse issues that immediately affect communities. We strengthen nonprofit organizations through fiscal sponsorship, capacity building, and program evaluation; improve life chances for youth and young adults; and provide economic opportunity to low-income households, working families, and disadvantaged businesses.

What We Do

The Coalition shapes public policy and delivers programs that respond to urgent community needs. The problems we face are far too complex for one entity to solve on its own. Our deep community roots and strong linkages to public and private groups allow us to bring together a diverse set of resources around specific issues to drive change from the ground up. The Power of Coalition means that, together, we can accomplish what no one organization can do alone.

Our Priorities

- Strengthening nonprofits
- Building wealth in urban communities
- Developing youth and young adults
- Creating strategic partnerships

To learn more about the Coalition and its partners, please visit www.uac.org or call 215-851-0110.

Moderator: James Mergiotti

President

Peirce College & CEO



James J. Mergiotti became president and chief executive officer of Peirce College on July 1, 2009. Mr. Mergiotti joined the College as vice president, administration in July 1998 and was promoted to executive vice president and chief operating officer in January 2000. In these roles he was responsible for all aspects of the baccalaureate-level institution, administratively and academically. He served as a Peirce College trustee from 1988 to 1998, including a term as board vice-chair.

Mr. Mergiotti is a strong advocate for a relationship-driven academic environment. He played a key role in the development of Peirce Online, one of the pioneer initiatives in online higher education in the United States, while enhancing programs and achieving record-level operating results, and substantial student enrollment growth, at Peirce. He led the College through a collaborative strategic planning process in 2009-10 focused on making Peirce the first choice for career oriented, non-traditional college students seeking high quality teaching and service. To date, the strategic agenda has resulted in elevated visibility of the Peirce brand, academic program expansion, enhanced student support, and the establishment of alternative revenue sources.

He has over 35 years of leadership experience in higher education, banking and public accounting including major roles in administration, operations and financial management, human resources development, mergers and acquisitions, strategic sourcing and contract negotiations, as well as nonprofit board relations.

He received an MBA in finance from LaSalle University and a BS in accounting from St. Joseph's University. He is a Certified Public Accountant, a member of the National Association of College and University Business Officers (NACUBO) and the Pennsylvania Institute of Certified Public Accountants (PICPA).

Always strongly committed to community service, Mr. Mergiotti is a director and former board chair of Villa Victoria Academy. He is a trustee of Saint Joseph's Preparatory School. Mr. Mergiotti also serves on the boards of directors of the Economy League of Greater Philadelphia and Youth Build Philadelphia. He has held numerous directorships for organizations in the past. In addition to community activities, Mr. Mergiotti enjoys running, sports, reading, movies and his family.

About Peirce College

"Many paths. One purpose."

Peirce College is in the business of transforming lives. They do so by making the benefits of higher education accessible and attainable to non-traditional college students of all ages and backgrounds. Peirce educates, empowers, and inspires our students and one another in a highly professional, career-focused academic environment defined by trust, integrity, and mutual respect. We are passionate about equipping our students to make a difference in their communities, workplaces, and the world.

Panelist

Lynn Marie Johnson-Porter

Executive Development, Major Gifts & Clinical Support
Children's Hospital of Philadelphia

An external relations professional, Lynn possesses more than 15 years of experience in development, annual giving and corporate/foundation relations. She currently serves as Executive Development for Major Gifts and Clinical Support for The Children's Hospital of Philadelphia Foundation (CHOP). In this capacity, she leads a team of Directors of Development who represent the various clinical areas across the Hospital and secure private gift support for a host of needs. Additionally, she works in concert with Hospital leadership to define and exemplify a culture of philanthropy both internally and externally that reflects CHOP's core values and mission.



Prior to this position, Lynn worked as Vice-President of Philanthropy for Presby's Inspired Life, the region's foremost providers of retirement care communities. There she was responsible for soliciting philanthropic support from individuals, corporations and foundations in pursuit of the funding needs for the organization and its communities. Her acumen for capital campaigns resulted in the completion of a new medical center for the organization's flagship community, Rydal Park, which is located in Jenkintown, PA.

At the core of her professional experiences is her background in Journalism which led to her dynamic engagement as a news writer and producer at KYW – TV3.

Her academic career features Temple University, Penn State University and Villanova University.

Lynn and her husband, Dale, reside in Elkins Park, Pennsylvania.

About Children's Hospital of Philadelphia (CHOP)

Since its start in 1855 as the nation's first hospital devoted exclusively to caring for children, The Children's Hospital of Philadelphia has been the birthplace for many dramatic firsts in pediatric medicine. The Hospital has fostered medical discoveries and innovations that have improved pediatric healthcare and saved countless children's lives. Over 150 years of innovation and service to our patients, their families and our community, reflect an ongoing commitment to exceptional patient care.

Panelist

Aimée Miller

Senior Vice President and Partner
Fairmount Ventures



Aimée Miller, Senior Vice President and Partner at Fairmount Ventures, has over 18 years of experience in program design and assessment, development and business planning, and fundraising from all sectors to advance nonprofit organizations' resource, capital, and capacity needs. Her focus includes advising clients on developing and executing strategies to increase revenues from a range of private, public and earned income sources. Ms. Miller has advised on city homeless services and regional creative economy planning efforts, and is a co-founder and the current Board Chair of Girls Rock Philly, a music education and mentoring program. She has an extensive background in media and cultural criticism through past work in public radio and journalism, including at WXPB-FM and *The Washington Post*. Ms. Miller holds a Bachelor of Arts from the University of Pennsylvania, where she attended the Annenberg School for Communication. A native Philadelphian, she resides in the Bella Vista section of the city.

Follow Aimée and Fairmount at: **@FairmountV**

<http://www.linkedin.com/in/aimeemiller07>

<http://fairmountinc.com/blog/>

<https://twitter.com/FairmountV>

About Fairmount Ventures

Fairmount Ventures provides insightful guidance to nonprofits, foundations and public agencies as they look to answer critical, what's-next questions. When you hire Fairmount Ventures, you don't hire one person who knows how to do one thing. You hire a deep bench of experienced professionals with practical knowledge of the nonprofit, public and philanthropic sectors and formal academic training in a wide variety of disciplines such as city planning, public policy, communications, human services and education. Fairmount's practical, strategic approach enables our clients to make the right choices with confidence.

Panelist

Ina Lipman, Esq.

Executive Director
Children's Scholarship Fund Philadelphia

Prior to joining CSFP, Ina was the Executive Director of The Peggy Browning Fund, a nationally based non-profit organization serving law students and worker rights groups. An attorney with an extensive background in educational advocacy and organization building, she has worked for groups that have included the Greater Philadelphia First's Children Achieving and Health Partners. She has a B.A. from University of Connecticut and a J.D. from Temple University School of Law.



About Children's Scholarship Fund Philadelphia

CSFP is a privately-funded program whose mission is to provide children from low-income Philadelphia families with financial access to quality, safe, K-8th grade, tuition-based schools, thereby increasing their long-term economic and social success. CSFP grants [need-based scholarships](#) to children from low-income Philadelphia families, all of which are awarded by random lottery.



Each Segment is 20 minutes. We have integrated some of your questions from the registration survey into the discussion already, however, you have additional questions please save them until the end of the segment and we will have our panelists answer them OR you can **tweet your questions and use the hashtag #CoalitionU**.

Segment #1 -- Prospecting for New Donors

Best Practices:

- Engage your base! Ask longtime or major donors if they know two people who'd be excited about your mission, and would be willing to connect them for an introductory meeting or tour.
- The most accomplished Development professionals do everything they can to extend the life of existing donors and utilizing those relationships to identify additional avenues for support. Additionally, they remove any variables that might cause existing benefactors to leave their organizations. Be sure to:
 - Introduce a series of "reactivation" techniques, including personal letters, phone calls, and personal visits from leadership.
 - Recognize previous support to increase loyalty. Utilize letters; commemorative plaques; regular receptions for donors; listings in annual reports; and providing access to privileged events or information.
- Secure a fundraising board to look for new board prospects if your current board is not focused on fundraising.

Notes: _____



Segment #2 -- Ways to Engage New Donors

Best Practices:

- Consider a monthly sustainer campaign starting at a barrier-free price point (e.g., as low as \$5 or \$10 a month).
- Create activities/events that allow donors to directly experience your mission and those you serve.
- Engage a Young Friends group to host a networking event and launch a 3-4 week campaign to raise money for a very concrete need. Use an online platform like Indiegogo or Razoo to spread the word online.
- Enlist a volunteer or pro bono company to make a short, compelling video telling your organization’s story from the clients’ perspective. Share it online and via email along with a specific “ask”.
- Remind people that you rely on donations! Spotlight volunteers or members who give in electronic communications, and make sure you provide an easy, one-click donate button.
- Remember: the “best prospects” vary from organization to organization. But, most non-profits find success in gaining support from constituents, board members, staff, current and lapsed donors, vendors and those generous to similar causes.
- Design fundraising activities to nurture the relationship and foster involvement. This might include:
 - Newsletters and general mailings;
 - Invitations to tour facilities;
 - Social and informational gatherings, including a gracious and fun buffet with the Executive Director, Board Chair, Board Members or key staff—all of which are useful in the cultivation process.
 - Focus Groups also provide useful information about attitudes. Participants, both donors and prospects benefit from exploring and sharing their attitudes.

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Segment #3 -- Cultivating Relationships with Existing Donors

Best Practices:

- Always have regular non-solicitation updates and communication with your donors. Always follow-up meetings with a prompt handwritten thank you.
- Your Board members are your best organizational ambassadors. Make sure they all have a 30-second “elevator speech” and 2-3 talking points they can share with others who may care about your mission.
- Assign Board members 2-3 donors or prospects at a special event; their job is to connect with those individuals, thank them for their support, and find out why the organization is important to them.
- On a rotating basis, ask Board members to call or write personal thank-you notes to donors in addition to the formal IRS acknowledgement letters they receive.
- Remember that many major donors are business executives. Therefore, it is prudent to examine the respected sales techniques they are accustomed to and how they are applicable to donor relationship management. Although aggressive sales practices may differ from major donor development, the art of customer-centric relationship management has a lot of similarities to major donor relationship management.
 - Show your customer/donor respect—it demonstrates the importance of their gift.
 - Make your customer/donor feel special—they will feel good about their involvement in the mission.
 - Provide good customer service—it demonstrates your organization’s competence.
 - Have a positive attitude and show enthusiasm—it demonstrates confidence in what your organization is doing and will help your donor become excited about their giving.
 - Respect your organization/mission—it is difficult to convince others to give to your organization if you do not believe in what it is doing.
 - Know your product/mission—donors will have more confidence in giving if you are able to help them understand the impact/value your organization is making.
 - Demonstrate good ethics—it will build trust and confidence in your organization.
 - Ask your customer/donor meaningful questions—determine what their positions are so you can explain how their philanthropic goals align with what your organization is doing.

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Segment #4 -- Closing the Deal/Securing funding

Best Practices:

- **Don't be afraid to ask.** The answer is always no if you don't ask. And remember, the gift is going to a mission you believe in and not to you personally – so feel confident in that ask.
- **Follow your instincts!** Asking for a gift should not be a transaction; it is a conversation that gives a prospect the opportunity to invest in a mission that they care deeply about.
- **Be an active listener.** Consider an interim meeting to ask prospects which aspects of your services are most exciting to them, and talk about your plans and funding needs for the future. Then, tailor a follow-up request that is most likely to match their interests and your organizational needs.
- **Understand “why people give.”** The reasons are as follows:
 - Belief in an institution and its purpose
 - Belief that current needs are important
 - Sense of loyal, gratitude, affection
 - Tax considerations
 - Friendship and respect for the solicitor; “People give to people.”
 - Honoring the past
 - Funding the future...not the past
 - Involvement with peers; Volunteers make a difference!
 - Recognition
- **Identification with a “winner” and the #1 reason people give:** They were asked!
- **When making the "ask:"**
 - It is best to have a team of two solicitors
 - Determine in advance which of the two solicitors will ask for the gift
 - Have a specific dollar amount in mind
 - Helpful words to use include: “consider,” “join me”
 - Be quiet after the ask...listen
 - Do not leave a pledge card
 - Verbally outline next steps
 - Close meeting graciously
 - Send thank-you note for their time and consideration, even if they have not given you're their answer.

Notes: _____

