Fast and Furious Fundraising Ideas for the Holidays

November 16, 2016

“Power Tools” webinar series

“Power Tools” Background

- Moderator: Denae Heartfield, Coalitions Relations Coordinator, U.S. Breastfeeding Committee

- Series of bi-monthly webinars, part of USBC’s training, technical assistance, and capacity building support for network of state, territorial, tribal, and community breastfeeding coalitions across U.S.
Webinar Access

- Access is open to all interested breastfeeding coalition members
- Topic/speaker details are posted 1-2 weeks before each session on a page on the USBC public website:
  - [www.usbreastfeeding.org/power-tools](http://www.usbreastfeeding.org/power-tools)
- Session details are also posted in the Coalitions Learning Connection (user account required):
  - [www.usbreastfeeding.org/CLC](http://www.usbreastfeeding.org/CLC)

Series Format Update

- AS OF 4/1/2015: To streamline access, these webinars have now been set up as a series.
- You only need to register for the series once, and you will then receive auto-reminders of each session with the topic/speaker details.
- Even though you may not be able to attend every session live, the series registration will still send you auto-reminders so that you have easy updates on the topic and links to the live webinar and archives.
Webinar Materials

- To find archives of past sessions:
  - Follow the link from your confirmation or reminder e-mails
  - OR
  - Go to www.usbreastfeeding.org/power-tools

Fast and Furious Fundraising Ideas for the Holidays
Q&A

- During today's sessions, all attendees will be in listen only mode.

- Questions may be submitted at any time during the webinar. Please type your questions into the Questions box on your webinar control panel.
Technical Issues

Audio problems? Other questions?
Please e-mail coalitions@usbreastfeeding.org

Today’s Topic

Fast and Furious Fundraising Ideas for the Holidays
Today’s Presenters

- Cheryl Lebedevitch, Workplace Program & Campaign Manager
- Sarah Walz, Program & Campaign Coordinator
- Lynette Anigbo, PR & Communications Coordinator
Why start now?

- The holiday season is a crucial period for fundraising efforts!
- According to Charity Navigator...
  - 31% of annual giving occurred in the month of December
  - 12% of annual giving occurs on the last 3 days of the year

Can we solicit donations??

- Yes, you can still accept donations even if don’t have IRS tax exempt status!
- IRS status only affects:
  - Whether your donors can deduct donations to you on their personal tax returns (typically only done by major donors anyway)
  - Whether institutional funders, esp. foundations, can grant to you
If accepting donations before IRS status granted...

- Make sure your coalition entity is incorporated in your state as a nonprofit corporation (see very first Power Tools webinar on Nonprofit Startup)
  - If you do not have separate legal entity, donations may be considered personal income and be subject to personal income taxes!!
- Make sure using small business bank account (large chains, including Chase and PNC, offer free checking options for nonprofits)
- Make sure to inform donors that their contributions are not tax-deductible

If accepting donations while IRS status pending...

- Inform donors of this fact
- Once you receive your IRS status, donations received while your application was pending may be treated as tax-deductible retroactive to the date of your organization's formation (i.e., your incorporation date in your state)
  - This information may be especially relevant to share with any major donors...
Acknowledgements

Gift acknowledgements serve two basic purposes:

- Opportunity to thank donors personally and sincerely, build relationships so they will continue supporting your coalition! (see Idea # 8)
- Substantiate donations if donors need documentation (e.g., to deduct on their tax return).

IRS Requirements for Acknowledgments

For contributions of $250 or more, IRS requires public charities to send written acknowledgements that must contain:

- Organization’s name
- Amount of cash contribution (i.e., monetary, can be cash/check/credit card/Paypal/etc.)
- Description (but not value) of non-cash contribution (i.e., in-kind goods or services donor provided to your coalition)
- Statement that no goods or services were provided by your coalition to the donor, if that is the case

OR

- Description and good faith estimate of the value of goods or services that coalition provided to donor in return for the contribution (e.g., if offered a free gift to donors above a certain amount)
Sample Acknowledgement Language (no free gift)

Thank you for your generous individual contribution to [coalition name]. Your donation will be used in general support of our work to [mission statement]. We are so grateful for supporters like you who stand by our side: YOU are an essential part of this critical work.

The details, including the date and amount of your unrestricted gift are listed below. Please save this letter/e-mail and retain it as your official receipt and record of this donation, noting that [coalition name] did not provide any goods or services to you in consideration for your contribution.

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[coalition name] is a 501(c)3 nonprofit organization, and your contribution is tax deductible to the extent allowed by law.

OR
[coalition name]'s application for IRS tax exempt status is currently pending, so your contribution is not tax deductible at this time. Once we receive our IRS status, this donation will become tax deductible. We will be sure to notify you when this occurs.

OR
[coalition name] has not yet applied for IRS tax exempt status, so your contribution is not tax deductible at this time. Your support, however, is critical to enable us to build capacity to take this next step in our development.

Sample Acknowledgement Language (w/ free gift)

☐ There are additional IRS requirements when a free gift is provided with a donation.

☐ Sample Language:

If you received/ordered one or more donor gift items, your donation is tax deductible less the fair market value of $[____]* per [name of free gift item].

*Just insert the cost to you to purchase each free gift item...don’t include shipping or handling.
State Charitable Solicitation

States have laws regulating solicitation of funds:

- Registration before soliciting contributions (some exemptions—see next slide)
- Additional requirements when activities involve paid solicitors or fundraising counsel
- Filing financial reports

Check your state’s requirements:

- NASCO list of state offices that regulate charitable organizations
- Multistate Filing website

Who is excluded?

Patchwork of exclusions from coverage...product of each state's constitutional and political considerations:

- most have exemptions for organizations raising only small amounts (e.g., under $5,000)

The Appendix of the Unified Registration Statement has details on each state’s exemptions, but confirm with your state as the laws are often tweaked...

For more info see second Power Tools webinar on Nonprofit Maintenance.
EIGHT FAST/FURIOUS IDEAS

(1) Accepting Donations w/o a Donate Webpage

- There are many fundraising platforms!
  - For orgs with 501(c)(3) status:
    - Razoo
      - Razoo is waiving their platform fee for Giving Tuesday
    - JustGive.org
      - For orgs registered as 501(c)(3) AND listed in Guidestar
    - Guide Star
      - Add a "Donate Now" button to your GuideStar report
  - For orgs without 501(c)(3) status:
    - PayPal
(2) Giving Tuesday

- #GivingTuesday kicks off the charitable season with a global day of giving celebrated on the Tuesday following Thanksgiving and the widely recognized shopping events Black Friday and Cyber Monday.
- Visit givingtuesday.org for a comprehensive toolkit, including:
  - Social media tools
  - Sample press release
  - Sample outreach email
  - #Unselfie, a selfless selfie featuring a caption with how or why you are giving.

(3) Matching Challenges

- Matching Gift Challenges are gifts made to your organization under the provision that other donors come together to match it. Eg. “Your donation will be matched dollar for dollar, doubling your impact!”
- Finding a matching gift:
  - Combine Board member or volunteer pledges into a matching gift challenge
  - Ask a past or recurring donor (if you have one).
(4) Savvy Shopping

- **Amazon Smile**
  - Donates 0.5% of your purchase price directly from Amazon’s site
  - Need to be 501(c)3 to participate
  - *Sample language to supporters (provided by Amazon):*
    - #StartWithaSmile at [smile.amazon.com/ch/59-3674883](http://smile.amazon.com/ch/59-3674883) for your holiday gifts and Amazon donates to United States Breastfeeding Committee, Inc.

(4) Savvy Shopping

- **Goodshop/Goodsearch**
  - Shopping portal for 1000s of retailers where customers can support their favorite cause (you!) while they shop
  - Not required to be a 501(c)3
  - *Sample language to supporters:*
    - Save money and support [coalition], using any of Goodshop’s coupons on items ranging from books from Amazon and shoes from Kohl’s to dishes from Macy’s. Goodshop also has dining and entertainment deals for most major cities. Help us support breastfeeding families by signing up, choosing [coalition] as your cause, and using Goodshop’s portal when shopping online!
(5) Just ASK your network

- The most important thing you can do is ASK
- **Keys to the Ask:**
  - Tell the **story of your coalition** and the awesome work you do!
  - **What** does the money go to?
  - **Why** should they donate to you? What makes you special?
  - Talk about the **you** not the **we**

(5) Just ASK your network

- **Email tips and tricks:**
  - Eye-catching subject line
  - Short, active paragraphs
  - Strategic **bold/italics**
  - Include link to donation page early and often
  - Friends don’t let friends draft alone!
- Check out the **template appeal** in our toolkit!
(6) Letters to Local Foundations

- Finding the right local/family foundation
  - Foundation Directory Online: email coalitions@usbreastfeeding.org for log-in information
  - Foundation web site—check out the board and see if you know anyone
  - News sources, like Philanthropy News Digest, local media, or databases through your public library
  - Internet searches—who else have they funded?
  - Your own networks of peers and colleagues

- Foundation prospect tracker (in toolkit)
  - Take note of contact info, preferred method of contact

(6) Letters to Local Foundations

- Foundation Outreach Letter (in toolkit)
  - Send to three local prospects in early Dec.
  - Follow up!

- Foundation Center PT Webinars
  - Grantseeking Basics
  - Intro to Proposal Writing
(7) Social Media

□ Why a Meme?
- They take up space and get noticed
- They increase your ability to customize messaging especially when characters are limited
- They ensure that key details are not lost

Call to Action

Make Your Case. When you make the graphic you should already have most of this language drafted for an email. You should be cutting and pasting lines you want to stand out.

Link to Donation Page
Your donation helps ensure breastfeeding mothers have the support they need and deserve

Thank you for your commitment to breastfeeding families.

Image Guidelines

- Guidelines for image and file sizes across social media platforms are always changing. Use the link from Social Sprout to stay up to date.

(8) Thank Yous

"Donor-centric" messages—those that focus on the donor's role in achieving the mission, not the nonprofit's—are more effective in retaining donors, according to many fundraising experts.

- Venues: email, social media, printed cards, post donation message, handwritten cards
- [https://www.classy.org/blog/infographic-ultimate-thank-nonprofits/](https://www.classy.org/blog/infographic-ultimate-thank-nonprofits/)
- 5 Best Practices for ‘thank you’ Phone Calls

Our Gift to You

- USBC cards used at conference w/ $1 Challenge with image of Suzanne Haydu’s beautiful painting
- In lieu of doing a free gift to USBC holiday donors this year, we used budget to purchase another of Suzanne’s paintings to make image available to coalitions
- Print your own TY cards w/ image:
  - [www.vistaprint.com](http://www.vistaprint.com)
  - [www.psprint.com](http://www.psprint.com)
  - [www.moo.com](http://www.moo.com)
Ideas for Next Time

We’ve brainstormed a few ideas for a future “Advanced Fundraising 201” webinar:

- Action alerts: auto-email makes donation “ask”
- Tweets to appropriators/foundations
- Employer matching
- Free gifts
- Stock donations
- Donate functions – recurring, tributes
- Donor retention

Fast and Furious Fundraising Ideas

Questions?
Thank you for all you do!

Action 20. Improve national leadership on the promotion and support of breastfeeding.

- Increase the capacity of the USBC and affiliated state coalitions to support breastfeeding.
- Create a federal interagency work group on breastfeeding.