

○

## Braving Blended Gifts

How to Strategically Achieve Greater Engagement, Efficiency & Effectiveness

Presented by: Tycely Williams, CFRE  
Sponsored by: The Stelter Company  
May 17, 2017

STELTER @tycely #TycelyLive @StelterCompany

---

---

---

---

---

---

---

---

### Presenter

○



**Tycely Williams, CFRE**  
Vice-President of Development  
YWCA USA

- Develops and implements comprehensive fundraising strategies to increase dollars raised from contributed and earned income for the YWCA
- Has helped nonprofit organizations raise and manage more than \$80 million dollars over the past nineteen years
- Prior to YWCA, served as the chief development officer for American Red Cross in the National Capital Region
- BA in Communication from Wake Forest University
- Chair, Board of Trustees for Monument Academy Public Charter School
- Past president of AFP Washington Metro Chapter

STELTER @tycely #TycelyLive @StelterCompany

---

---

---

---

---

---

---

---



○

## What's Up?

Integration of Annual, Major & Planned Gifts

- Trends, Tradition & Turning to the Future
- Ways to Promote Blended Gifts
- Achieving Engagement, Efficiency & Effectiveness
- Q & A

STELTER @tycely #TycelyLive @StelterCompany

---

---

---

---

---

---

---

---



○

# \$373.25 billion

Giving USA 2016

## Is What's REALLY UP!

STELTER @tycely #TycelyLive @StelterCompany

---

---

---


---

---

---

---

---



○

### Current Giving Trends (AFP/Urban Institute 2017)

- **45%** average donor retention -0.5% change from 2016
- Every **100** donors gained in 2016, offset by **99** lost due to attrition

STELTER @tycely #TycelyLive @StelterCompany

---

---

---


---

---

---

---

---



○

### Current Giving Trends (AFP/Urban Institute 2017)

- Orgs. raising **\$500,000+** had a median **8.6%** rate of growth
- Orgs. raising **\$100,000 - \$500,000** had a median **1.2%** rate of growth
- Orgs. raising under **\$100,000** had a median loss of **-10.4%**

STELTER @tycely #TycelyLive @StelterCompany

---

---

---

---

---

---

---

---



# Say What?!

STELTER @tycely #TycelyLive @StelterCompany

---

---

---


---

---

---


---

---



## Traditional Approach

Drives donor engagement & experience solely by gift size & financial capacity



STELTER @tycely #TycelyLive @StelterCompany

---

---

---


---

---

---

---

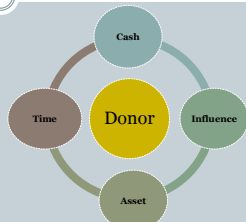
---



## Blended Approach

Donor-Centered:  
Allows for engagement based upon demonstrated gift (beyond \$)

\* Gift size still influences organizational investment



STELTER @tycely #TycelyLive @StelterCompany

---

---

---


---

---

---

---

---



**Building a Blended Approach**

Strategy   Systems   Structure

STELTER @tycely #TycelyLive @StelterCompany

---

---

---


---

---

---

---

---



**Tip One: Extend Engagement**

Quantify: Set & Meet Annual Donor Retention Goal

- Segment goal by gift size for 3 general types

Relative to organizational donor-pool

- Modest
- Mid-Level
- Major

STELTER @tycely #TycelyLive @StelterCompany

---

---

---

---

---

---

---

---



**Tip One: How To Extend Engagement**

1. Create a base line for modest, mid-level & major gifts
2. Set sub-goals for each gift classification & define the collective goal
3. Link goals to defined measures of success for board or fundraising committee + every staff member

STELTER @tycely #TycelyLive @StelterCompany

---

---

---

---

---

---

---

---



**Tip Two: Think Transformational**

Quantify: Set & Meet Individual Fundraising Goals through inspiring donors to give above & beyond

- Set by gift size for 3 general types

Relative to current donors/partners	Modest (i.e. above \$500)
	Mid-Level (i.e. above \$2,500)
	Major (i.e. above \$5,000)

STELTER @tycely #TycelyLive @StelterCompany

---

---

---

---

---

---

---

---



**Tip Two: How to Think Transformational**

1. Craft & share transformational success stories (lift from real donor/partner investments)
2. From your Strategic Plan create transformational calls to action for modest, mid-level & major giving (not yet funded/invested)
3. Partner with Communication & Programmatic teams

STELTER @tycely #TycelyLive @StelterCompany

---

---

---

---

---

---

---

---



**Tip Three: New, New & Newer**

Quantify: Set & Meet New Donor Acquisition Goals

- By either one, some or all:

Relative to organizational structure	Channel
	Segment (modest, mid-level or major)
	Portfolio (board & staff)

STELTER @tycely #TycelyLive @StelterCompany

---

---

---


---

---

---

---

---



**Tip Three: How To Get New, New & Newer**

1. Track & record where new donors come from
2. Review calendar & leverage face-to-face opportunities
3. Involve volunteers, board members & current donors/partners

STELTER @tycely #TycelyLive @StelterCompany

---

---

---

---

---

---

---

---



**Frame Your Call to Action**

**Output:** Amount of something produced

**vs.**

**Outcome:** A consequence, aftereffect or result

YES

STELTER @tycely #TycelyLive @StelterCompany

---

---

---


---

---

---

---

---



**Bring On the Secret Sauce**

Values → Mission → Vision

Well, of Course!

STELTER @tycely #TycelyLive @StelterCompany

---

---

---

---

---

---

---

---



**Inside the Mind: Planned Giving**  
 Dr. Russell James, Texas Tech University

- Use visual autobiography (reconfigure messages, speak in 3<sup>rd</sup> person)
- Forget the term "bequests"; it reminds people of mortality—people will postpone these conversations; talk "retirement" or "planning"
- Adopt annual strategies to heighten awareness & ease fear; frame it as preparedness for the future

STELTER @tycely #TycelyLive @StelterCompany

---

---

---

---

---

---

---

---



**How to Adopt Annual Strategies**

- January: New Year, New You!  
Target: 1<sup>st</sup> time & annual donors
- April: National Financial Literacy Month  
Target: Major donors (demonstrated capacity; regardless of age)
- October: National Estate Planning Awareness Week (Oct. 19<sup>th</sup>-25<sup>th</sup>)  
Target: Major donors over 60 years of age
- December: Giving Tuesday (Dec. 1<sup>st</sup>)  
Target: Collective

STELTER @tycely #TycelyLive @StelterCompany

---

---

---

---

---

---

---

---



**Recognition & Stewardship**

- Meet with donors 1:1 to share the impact of the annual gift
- Celebrate donors who increase annual giving (privately & publicly)
- Maintain solid records in order to reference lifetime giving totals (incorporate within moves management plans)
- Emphasize the impact of a financial gift & not the mechanics of the gift
- Highlight how donors influence others to give

STELTER @tycely #TycelyLive @StelterCompany

---

---

---

---

---

---

---

---



## Questions Anyone?

Tycey Williams, CFRE  
Vice-President of Development  
YWCA USA

STELTER @tycey #TyceyLive @StelterCompany

---

---

---

---

---

---

---

---

### Additional Questions

tycey@tyceywilliams.com

nathan.stelter@stelter.com

jen.lennon@stelter.com

stella@stelter.com

[www.stelter.com](http://www.stelter.com)

STELTER @tycey #TyceyLive @StelterCompany

---

---

---

---

---

---

---

---

### Following the Webinar

In a few days you will receive an email giving you instructions on how to access:

- The recording.
- The presentation slides.

[www.stelter.com/webinars](http://www.stelter.com/webinars)

STELTER @tycey #TyceyLive @StelterCompany

---

---

---

---

---

---

---

---





**Thank YOU!**

[tycely@tycelywilliams.com](mailto:tycely@tycelywilliams.com)  
Connect via LinkedIn

Here's how: <https://www.linkedin.com/in/tycelywilliams>

Extreme gratitude to The Stelter Company, my trusted blended gifts partner.

STELTER @tycely #TycelyLive @StelterCompany

---

---

---

---

---

---

---

---