

Raise[®]
2022

Fueling the Flames of Your Special Event Fundraising

SCOTT JONES – AUCTIONEER

PAMELA ORR – EXECUTIVE DIRECTOR

KYLE CURRY – WEALTH SCREENER

Welcome!



Scott Jones, CFRE, CAI, BAS

Special Event Consultant & Professional Auctioneer
Raising Paddles Fundraising Auctioneers

Over \$30 Million Raised in 2022 in 67 Events!
90 Events to Go...

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2022

Welcome!



Pamela Orr

Executive Director of Fellowship Housing Corporation
Schaumburg, IL

Welcome!



WINDFALL

Kyle Curry

Senior Director of Nonprofit Sales

Chicago, IL

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Agenda



Securing the
Gift



Culture of
Philanthropy



Cultivation



Wealth
Screening for
Special Events



Stewardship



Q & A

4 Keys to Securing Gifts



CULTURE OF PHILANTHROPY



DONOR/COMMUNITY CENTRIC
MINDSET



CULTIVATION



STEWARDSHIP



Who Should Attend?



LINKAGE

ABILITY (CAPACITY)

INTEREST

CAPABILITY

Donor-Centric Fundraising

DONOR'S NEEDS OVER ORGANIZATIONAL NEEDS



“Donors give through us,
not to us!!”





Community-Centric Fundraising

Aspire to transform fundraising and philanthropy, so that they are co-grounded in racial and economic justice.

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2022



Cultivation

Pre-Committed Giving

Secure 50% of your fundraising goal BEFORE the event starts

WHY?

Avoid the crickets, build momentum

HOW?

- Turn a no into a yes!
- Leverage Matching Gifts-Individuals, Grants, Corporate
- Involve your board

HalfwayTM

Fundraising Goals Secured by Seat Value!



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Having the “Right Person”



Ask the “Right Donor”



For the “Right Amount”



At the “Right Time”

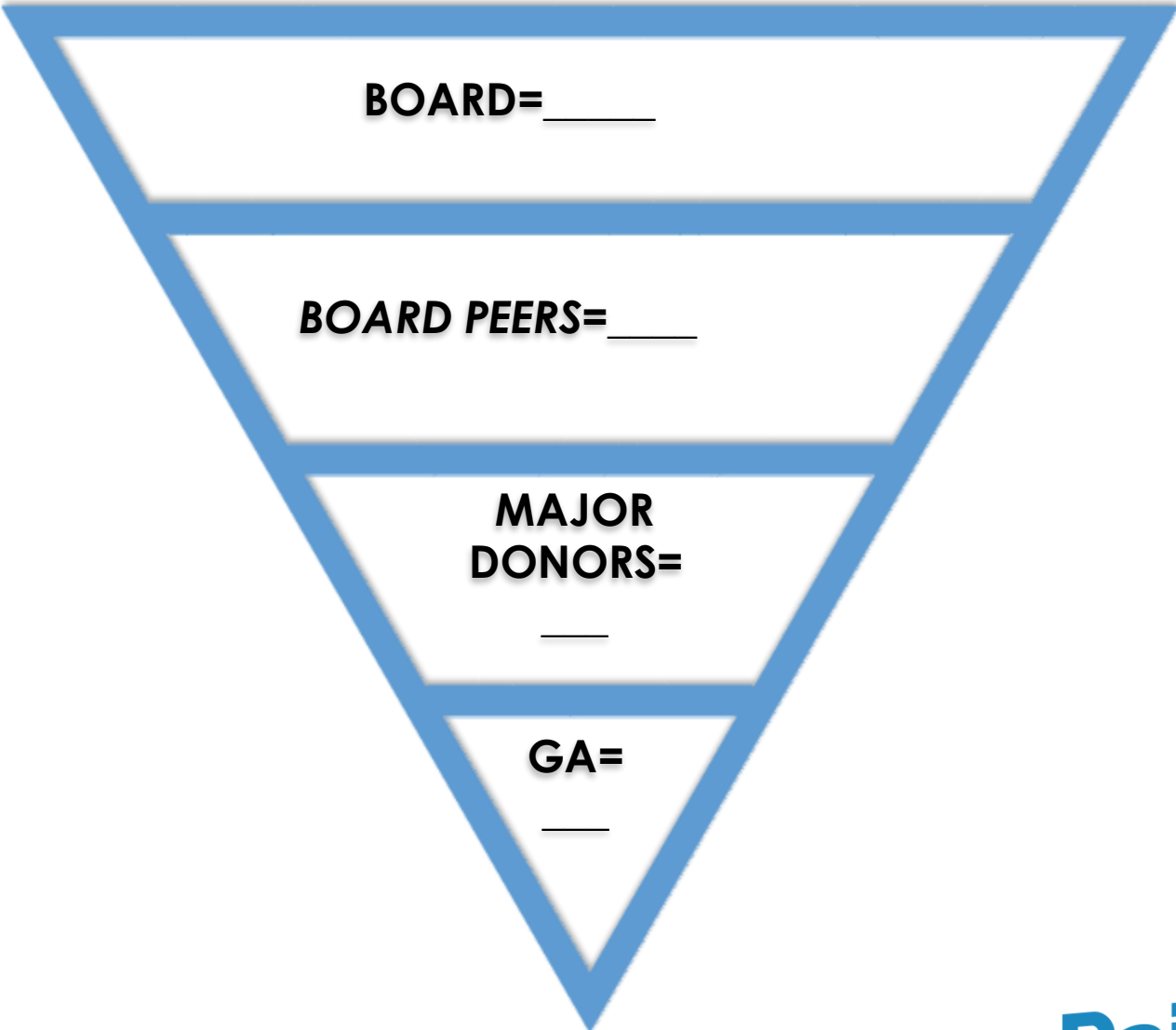
The “Right”
Model for
Fundraising!

A blue-tinted photograph of three women smiling and laughing together. The woman on the left is wearing a light-colored sweater, the woman in the middle is wearing a dark sweater, and the woman on the right is wearing a dark polka-dot top. They are all looking towards the right side of the frame.

Determine Seat Value

TRY IT OUT!

The Gift Pyramid



The Gift Pyramid

The Gift Pyramid for YOU Giving Moment Goal—\$____,000 w/ ____G.U.—We are looking for a Match!				Average Gift
Donors	% of Goal	\$ Amt	____# of Donors	\$ of Gift
Board	50%	\$____,000	____# of Board	\$____ Give/Get
Board Peers	25%	\$____	4 Guests= 48 new gifts	\$____ Each Get
Major Donors Sponsors	35%	\$17,500	____ Donors	\$____ avg /donor
Former Donors, New Donors, Volunteers,	15%	\$7,500	____ Guests	\$____ avg/donor

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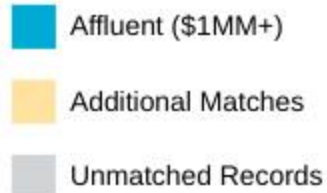
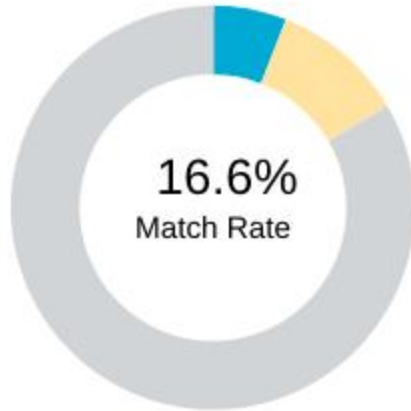
SPECIAL EVENTS

..... WHAT IS
**WEALTH
SCREENING?**

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2022

Windfall Wealth Analytics Report

Matched Households



Windfall provides this report anytime we sync with your data to help you understand our match rate.

In addition, you will find relevant statistics that gives you a better insight of your overall constituent base and where you are doing well and where there are opportunities to improve.

If you have any questions, please let your [customer success team](#) know!

Sync Details

Latest Upload Date:	September 4, 2022
Number of Constituents:	10,181
Affluent Constituents:	599
Affluent Match Rate:	5.9%
Total Match Rate:	16.6%
Duplicate Affluent Households:	81
Total Donations Processed:	\$9,706,923

We provide this report on all of the data that we received from your organization. The information above summarizes the data that has been submitted to Windfall.

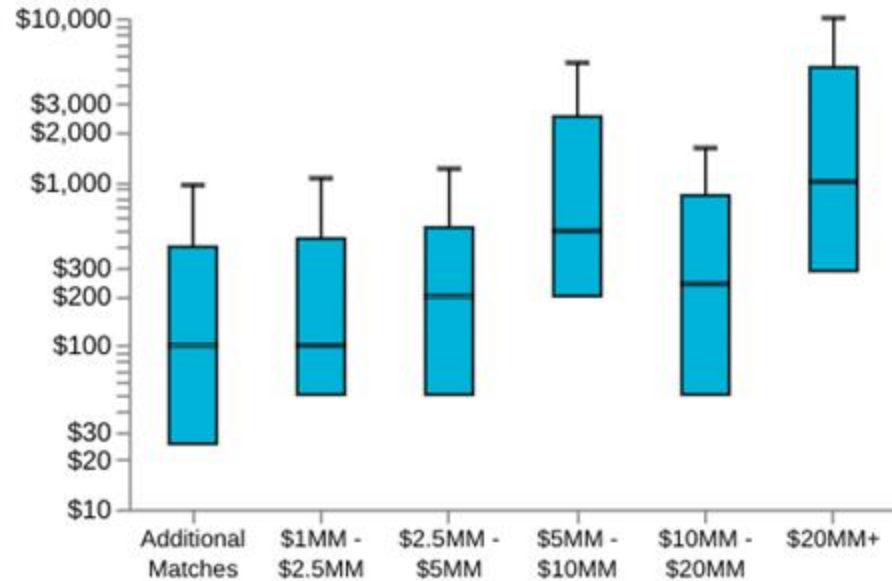
Windfall Wealth Analytics Report

Constituent Insights by Group

Net Worth Range	Number of Donors	% of CRM	Total Donations	Donations as % of Affluent Donors	Donations as % of Total Donors
Additional Matches	1,092	10.7%	\$842,889	—	8.8%
\$1 Million - \$2.5 Million	325	3.2%	\$762,527	24.8%	7.9%
\$2.5 Million - \$5 Million	161	1.6%	\$758,359	24.6%	7.9%
\$5 Million - \$10 Million	82	0.8%	\$1,299,422	42.2%	13.5%
\$10 Million - \$20 Million	21	0.2%	\$167,273	5.4%	1.7%
\$20 Million+	10	0.1%	\$93,070	3.0%	1.0%
Total	1,691	16.6%	\$3,923,542	100.0%	40.9%
Unmatched	8,490	83.4%	\$5,677,763	—	59.1%

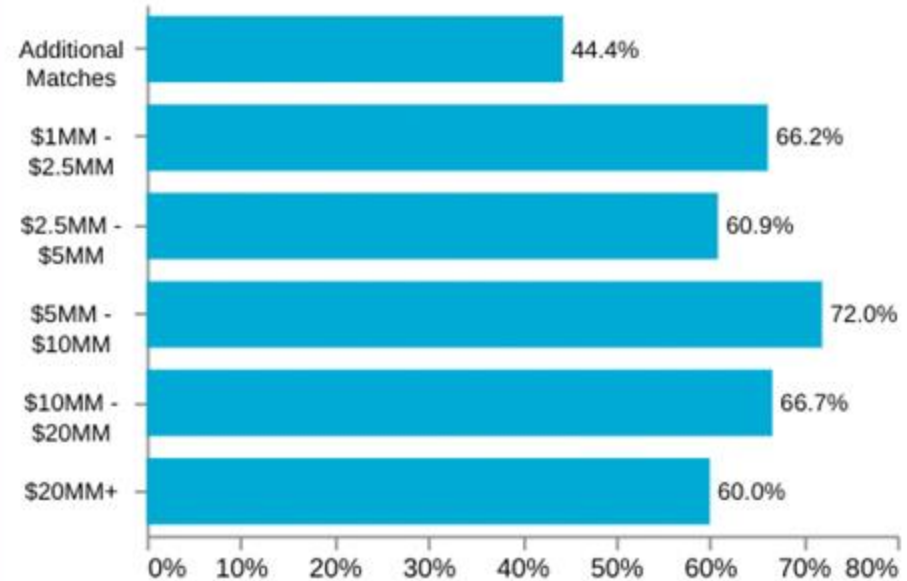
Windfall Wealth Analytics Report

Donation Distribution by Net Worth Bucket



The boxplot shows the donation distribution for your donors. The black line in the box represents the median donation and the blue box illustrates the 25% - 75% quartile.

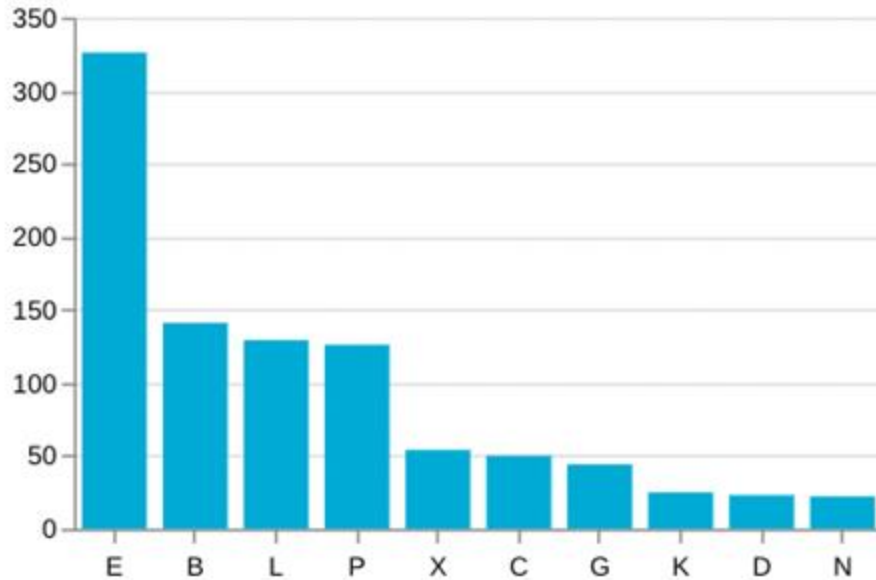
Wealth Penetration by Net Worth Bucket



This chart shows the percentage of constituents that have ever given to your organization based on the data submitted to Windfall. This does not take into consideration the total dollars.

Windfall Wealth Analytics Report

NTEE Codes by Constituents



The graph above showcases the philanthropic causes your existing donors care about, which is helpful for engagement. These are based on [NTEE codes](#) defined by the IRS.

Top 10 Trigger Analysis

Trigger	Affluent Count	% of Affluent
Philanthropic Giver	323	53.9%
Multi-property Owner	258	43.1%
Political Donor	207	34.6%
Trust Association	197	32.9%
Imported Car Owner	163	27.2%
Small Business Owner	52	8.7%
Recent Mortgage	27	4.5%
Recent Mover	23	3.8%
Nonprofit Board Member	11	1.8%
Luxury Car Owner	9	1.5%

In addition to net worth, Windfall provides additional data points called triggers. The table above outlines your top 10 triggers for affluent constituents.

STEWARDING THE GIFT

MANAGE GIFT PROPERLY



DONOR RECOGNITION



IMPACT REPORTING



PROTECTION OF PRIVACY

Why Do It?

- Donor retention
- Sets a buy-up for next ask
- Donor-centric fundraising
- Culture of philanthropy



Best Practices

Show Donors
w/ Joy

Phone Call w/n
24 hrs

Call Donors
Regularly

Thank You Letter
in 48 hrs

Amount of Gift in
Recognition Letter

Using "You" more
than "I" or "We"

Personalized
Letters over
Templates

Letter Hand-
Signed?

Include the
Contact
Information for a
Key Staff Person?

Did You Include a
P.S.?

If They Are New,
Welcome Packet?



QUESTIONS?

Now's my time to
hear from you!

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FOLLOW US ON SOCIAL

#2022RAISE



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[@onecauseteam](https://instagram.com/onecauseteam)



linkedin.com/company/onecause

