

CHICAGO CULTURAL ALLIANCE

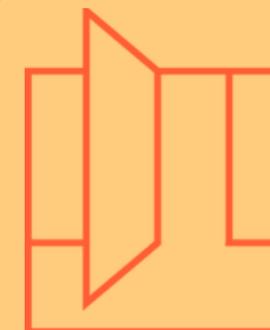
# MEETING THE MOMENT



# The Four Rs of Fundraising

*Basics for Beginners*

*Presented by: Colleen McGaughey*



National  
Public Housing  
Museum

# AGENDA

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01 Introduction and Overview

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02 Research: Where are the donors?

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03 Relationships: How do I build donors' interest?

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04 Requests: How do I ask for what I need?

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05 Retention: How do I take care of my donor partnerships?

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# SPONSORS

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# INTRODUCTIONS

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Colleen  
McGaughey  
(*she/her*)

Director of Development,  
National Public Housing Museum

- Leads the strategic direction of NPHM's fundraising efforts, with a focus on creative and community-centric approaches.
- Previously head of institutional giving at the Chicago History Museum, Director of Development at Literacy Works, and Director of Development at Howard Area Community Center.
- 25-year career in nonprofit development, with a key role in fundraising for initiatives ranging from HIV prevention to hunger relief to adult literacy instruction to museum exhibitions.
- On the board of directors of the Chicago Cultural Alliance.

# WE ARE DIFFERENCE-MAKERS WE ARE ALL FUNDRAISERS

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## **In this session, you will:**

- Understand the major components of the fundraising cycle
- Know where to begin to identify funding prospects
- Identify the unique strengths of your organizations that can be applied to donor cultivation and stewardship
- Gain confidence to ask for support for your organization

# The “R”s Framework

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Allows you to:

- Scale your efforts to your capacity
- Use your organization’s strengths to garner support
- Build a sustainable network of donors and ambassadors for your organization



# The “Rs” Framework

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The “Rs” Framework adapts to all donors:

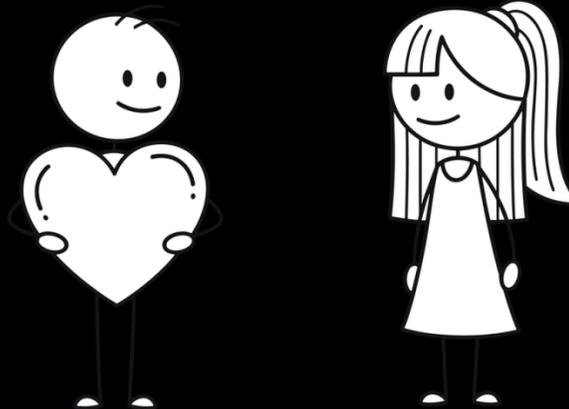
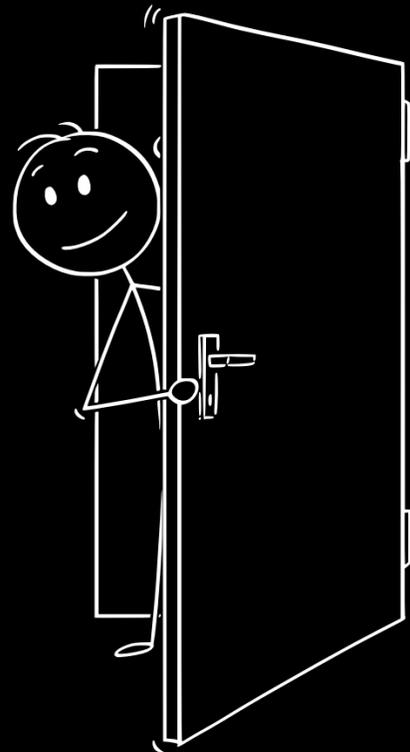
- Major donors, as defined by your org
- Lower- and mid-level donors
- Foundations, corporations, and government

The methods and intensity differ, but the principles are the SAME



# DONOR AND FUNDER PROSPECT RESEARCH: A STRATEGIC APPROACH

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Invest your efforts In supporters to whom you have **Access**, who **Believe** In your mission and who have **Capacity** to support



# ACCESS

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## IDEAL

- Executive director or board member has a connection
- Current and Past donors

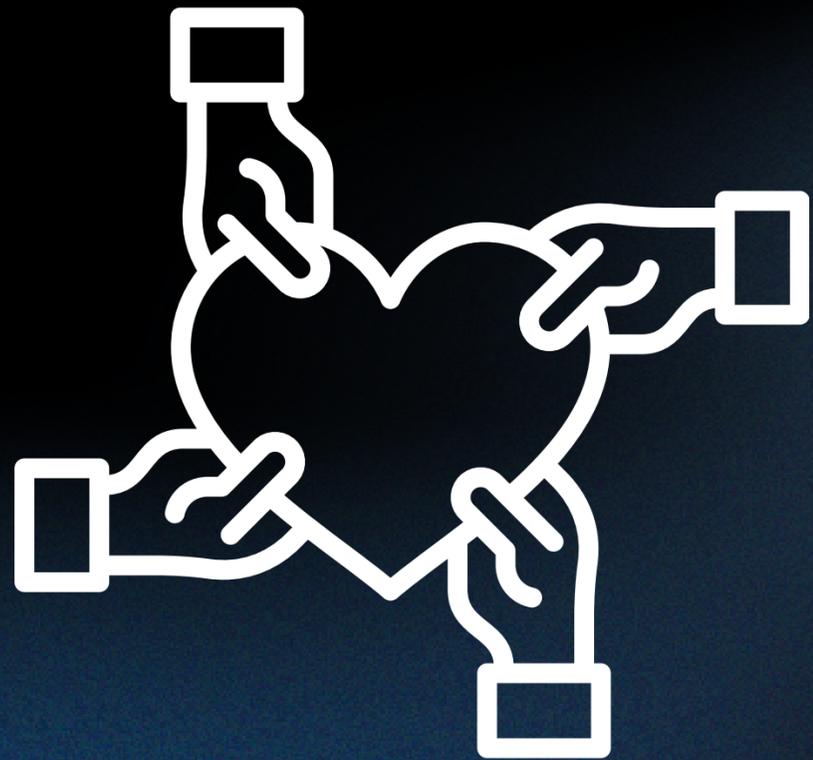
## GOOD ENOUGH

- They have attended an event at your organization
- They have signed up for your newsletter
- You met them at a networking event or gala
- What are other ways to connect with prospects?



# DETERMINING BELIEF (OR AFFINITY)

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## IDEAL

- Someone who has demonstrated Interest In your organization. They have donated, attended events, or just said “I love what you’re doing!”

## GOOD ENOUGH

- Someone who has given to an organization that is similar to yours
- Someone who shares characteristics with your targeted stakeholders/is part of your community
- What else have you looked at to see if a person shares your mission?

# DETERMINING CAPACITY

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## *IDEAL:*

- WealthEngine
- Donor Search
- iWave (accessible via Forefront membership)
- Double the Donation

# DETERMINING CAPACITY

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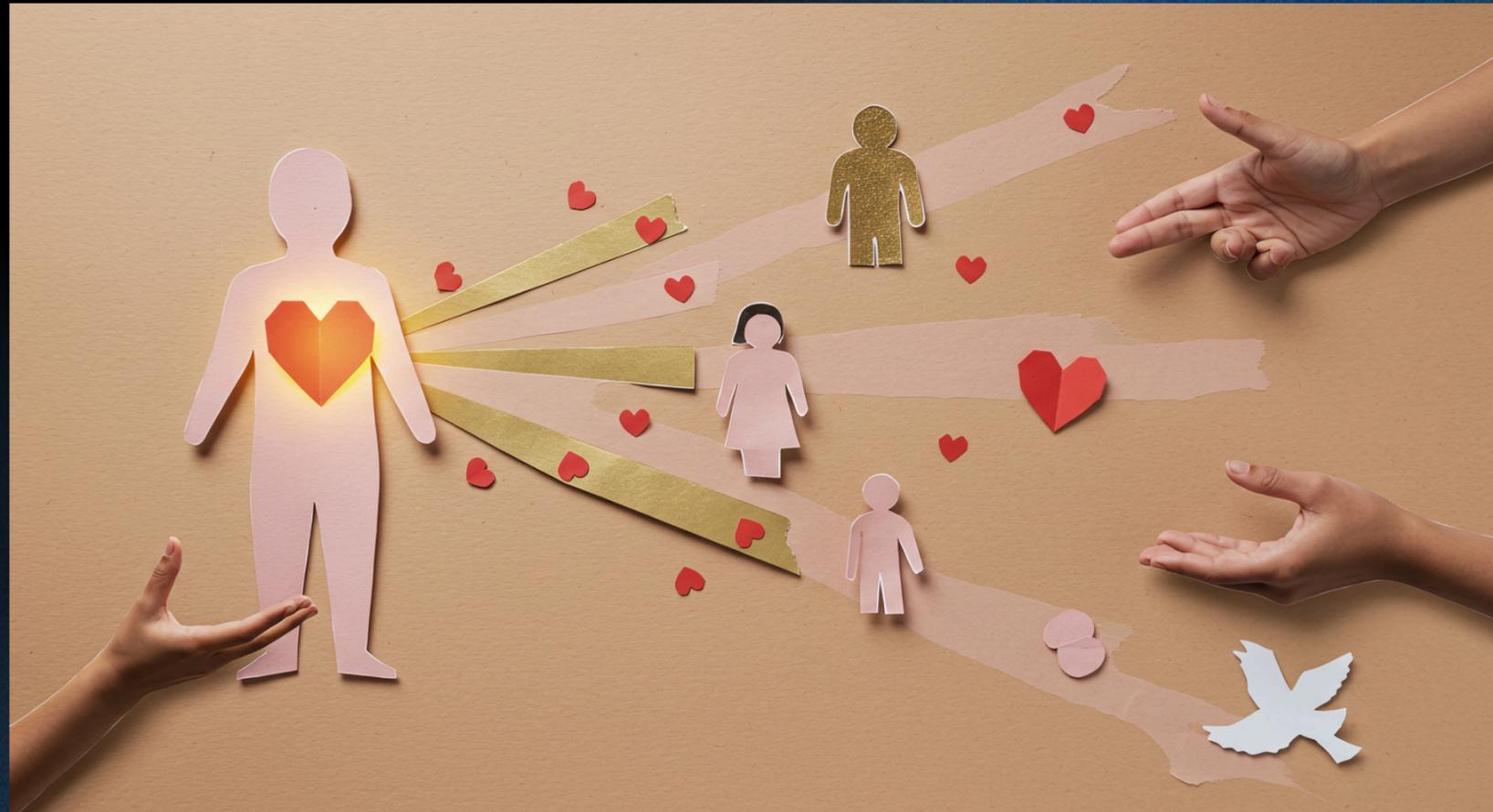
## GOOD ENOUGH

- Look at their giving to other orgs
- Research their property value
- Consider their profession
- What has worked for you?

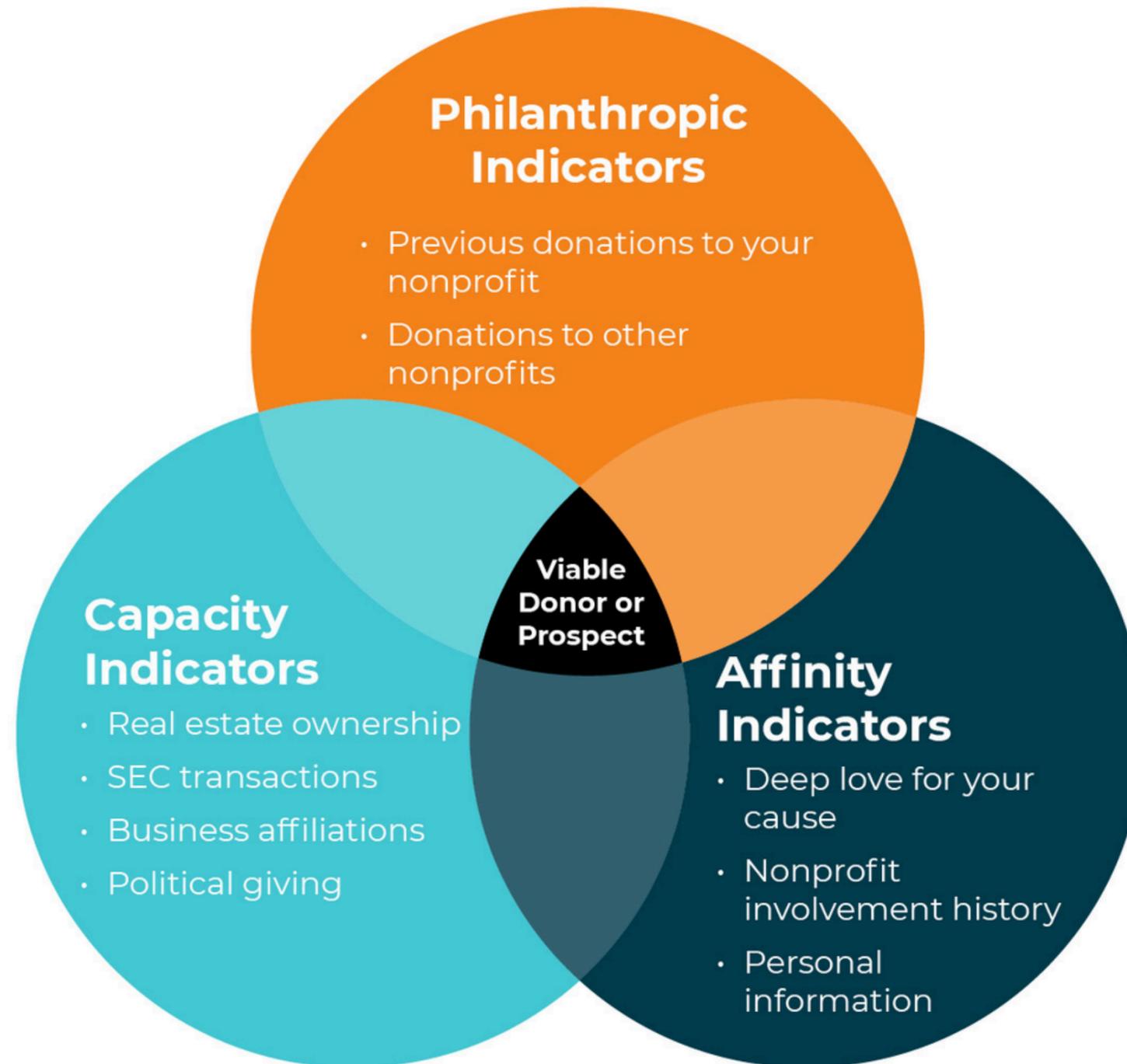
# BUT ARE THEY GENEROUS?

Someone who is wealthy may not be philanthropic.

Likewise, someone who isn't a millionaire can be very generous with their giving.



# WEALTH AND PHILANTHROPIC SCREENING INDICATORS



# THE SECOND "R" | **RELATIONSHIPS**

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- Getting to know each other: keep it personal
- Engaging donors in your work: put your best foot forward
- Building trust: transparency is key
- **LISTEN AND LEARN!**



# REFLECTION AND SHARING

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- What is a unique strength of your organization that you lean into when talking about your work?
- What are some creative approaches that might get someone to engage with you?



# THE THIRD "R": | REQUESTS

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- People give to strength and specificity
- Who makes the ask is important
- Ask when the timing is right
- Make the request about the donor (donor-centric)



# THE THIRD "R": | **REQUESTS**

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How you make the request matters.

- email
- phone or zoom
- in person



# THE FOURTH "R" | **RETENTION**

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Steward your donor relationships with care and creativity!

- Make your outreach personal and match it to what you know about the donor
- Create a list of donors who receive personal invitations
- Treat your donors like partners – ask for advice, provide regular updates



# ONE FINAL "R": | **RECORD!**

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Track your encounters with your donors as much as possible.

Use a database or excel sheet to keep helpful notes for yourself and others at your organization.



THANK YOU !



# Q&A

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