

Fundraising Trends

Climate of Concern or Environment of Opportunity?

ACQI State Conference
17 March 2010



O'KEEFE
& PARTNERS





SETTING THE SCENE

Habits & Motivations

Giving Trends



Giving Habits & Motivations

How?
Why?
No. of causes

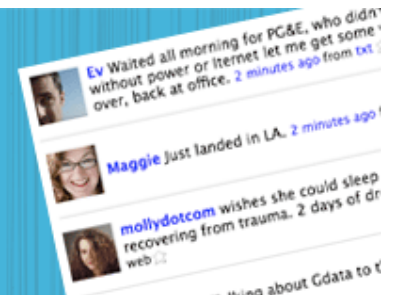
Technology, Social Trends & Habits



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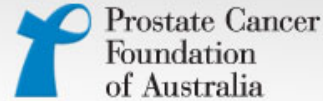
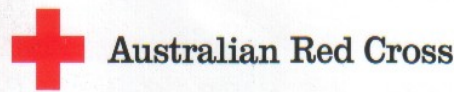
Third Sector



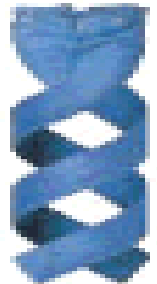
RSL QUEENSLAND BRANCH
RETURNED & SERVICES LEAGUE OF AUSTRALIA



Queensland Institute of
Medical Research



everyone's family





**The most compelling lesson to be learnt
from the past is the significant shift in...**

donor behaviour & giving patterns

attitudes to causes

lifestyle changes

philanthropists approach

industry professionalism

no. organisations reliant on fundraising income

Fund Availability



69.4%

Of NGOs in Australia experienced fundraising growth

76.9%

Sector leaders are optimistic regarding giving in the future

Top income growth areas



Major gifts

Bequest

Direct mail (eg appeals, regular giving)

Partnerships (eg corporates/trusts)

Individuals – continue to lead the way



72.2%
stated that personal
giving is continuing to rise

Corporate Cooperation



30 %

Believed corporate involvement would rise in the future

40.7%

Reported corporate partnership/sponsorship income has fallen

Key solicitation techniques

No. 1 Approach Adopted Personal solicitation



Technique	Percentage
Personal Approaches	16.2%
Planned Giving	15.5%
Major Gifts	13.4%
Direct Mail	10.4%
Sponsorship	8.5%
Online / Internet	7%
Trust Grants	6.1%
Special Events	5.8%
Government Grants	4.6%
Face to Face Selling	4%
Telephone	1.5%
Other & Didn't Know Group	7%

Program performance (by \$'s)



Top Performing Programs

- Individual Giving
- Direct Mail
- Bequests
- Major Gifts

Popular programs



Most Popular Programs

- Events
- Individual Giving*
- Direct Mail*
- Bequests*

* Also top financial performers

Generation Generosity Gap



40 plus

Most generous supporters
60-74 years (53.7%) & 40- 59 years (41.7%)

18-24 year olds

were not seen as generous

25-39 year olds

Tend to support international aid,
medical research & the environment

Generation Genes

Third Sector	Most Supportive Age Groups
International Aid Medical Research Environment and 'Boutique' causes	25-39
Hospital Education Disability/Welfare Medical Research	40-59
Art & Culture Age Care Social & Family Welfare Health	60-74
Health	75+



FUTURE SUCCESS

Strategies & Tips



1. **Think positively. Think success!**
2. **Set a growth vision – to inspire interest & generate financial support**
 1. **Realistic plan (eg: written K.P.A)**
 2. **Know your ‘Case for Support’ & P.O.D**
 3. **Understand why people support you and why they don’t. Action learning’s**
 4. **Continually ‘scan the market’ for new opportunities**



7. **Integrate your efforts**
(philanthropic, sponsorship, PR, marketing etc)
8. **Create decision making points throughout the calendar year**
9. **Double your personal solicitation efforts**
(phone/visits/tours/meetings)
10. **Enhance your recognition activities.**
(Inspire prospective supporters through the process)

Most importantly:

- Diverse & multiple income streams



ING FORWARD

programs?

ecting with people

What programs are suitable for aged care establishments?

- **Capital appeals**
- **Grant seeking programs (Trust / Government)**
- **Bequests**
- **Direct mail**
- **Open days**
- **Fetes / stalls**
- **In kind sponsorship**
- **Project based sponsorship**



Who do I need to connect with?

People who...

- Believe in your mission and vision
- Regard for your leadership & organisation
- Have a sense of community responsibility
- Have a history with the institution
- Personal association
- Are interested in the financial viability of your organisation
- Are known to your leadership & other stakeholders
- Have commercial arrangements with your establishment
- Are located within your precinct and surrounding postcodes

Why wouldn't people give to us?

- ❖ **Vision (fundraising / needs) is not set or clear to stakeholders**
- ❖ **Lack of prompts / offers to make a donation**
- ❖ **Relationship changes / personal circumstances**
- ❖ **Interests aren't aligned**
- ❖ **Premature request**
- ❖ **Failure to include spouse/business partner in the solicitation**
- ❖ **Inadequate follow-up**
- ❖ **Little interest (or link) in your establishment**
- ❖ **Lack of recognition and/or reporting**
- ❖ **Not inspired by your project or approach**



Fundraising success is about setting a realistic vision, bringing talent & expertise *'to the table'* and generating activity in the right areas.

Regular evaluation and monitoring is crucial to navigate success.

Fundraisers often focus on program mechanics, challenges & risks and over look the motivations, needs and habits of prospective supporters



Fundraising success is not just about money.

Its about connecting with stakeholders at regular intervals with a purposeful vision in mind.

The starting point is having a Fundraising Plan



Put yourself ahead!

Log onto:

www.okeefe.com.au

www.givingtrends.com.au



For more information or professional advice please contact Julie Johnson or Judy Taylor

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Key service:

- Capital campaigns
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- Bequest development
- Public relations
- Trust and Foundation program
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