



Fundraising with CiviCRM

What we do and how CiviCRM helps

Donor Life Cycle

- ▣ Attract
- ▣ Ask
- ▣ Thank
- ▣ Update
- ▣ Ask Again

Goal

- ▣ Sustaining is great, but we really want to grow relationships



Attract

- ▣ **Who might give?**

- ▣ Contact record
- ▣ Groups (ie. Mailing lists)

Capacity and Interest

- ▣ **When or under what circumstances?**

- ▣ Activities
- ▣ Events

Readiness

- ▣ **How should they be asked?**

- ▣ Relationships
- ▣ Notes

Ask

- ❑ **How do you know when to follow up?**
 - ❑ Meeting or phone call
 - ❑ Send an email
 - ❑ Survey

- ❑ **What if other people get involved?**
 - ❑ Meeting or phone call
 - ❑ Send an email

- ❑ **How much have they agreed to give?**
 - ❑ Pledge
 - ❑ Contribution

Example check

Contribution Record

1. Select Contact
John Doe

2. Create a New Contact
New Individual

3. Total Amount
500

4. Receive Date
Day the check arrived

5. Paid By
Check

6. Check Number
50201

John Doe (415) 463-9352 50201
111 Main Street
San Francisco, CA 94107 DATE: 4/06/2012

PAY TO: Your Charitable Organization \$500.00
THE ORDER OF: Five Hundred and 00/100 DOLLARS

MEMO: Please call if you have questions John Doe

||:395810205|: ||:949 58 394 ||: 9351

Contact Record

7. Address
*111 Main Street
San Francisco, CA 94107*

8. Phone
(415) 463-9352

9. Communication Preference:
*Preferred Method
Phone*

Thank you!

Batch Entry for Contributions



WARNING: Debug is currently enabled in Global Settings. ([learn more...](#))

Click Validate & Process below when you've entered all items for the batch. You can also Save & Continue Later at any time. Go to Administer > Customize Display & Screens > Profiles > Reserved Profiles > to add, remove or change the order of columns.

Total amount expected \$ 1,200.00

Total amount entered \$ 0.00

Contact	Type	Amount	Status	Received	Source
<input type="text"/>	- select -	<input type="text"/>	- select -	<input type="text"/>	<input type="text"/>
OR				Time <input type="text"/> (Clear)	
<input type="text"/>	- select -	<input type="text"/>	- select -	<input type="text"/>	<input type="text"/>
OR				Time <input type="text"/> (Clear)	
<input type="text"/>	- select -	<input type="text"/>	- select -	<input type="text"/>	<input type="text"/>
OR				Time <input type="text"/> (Clear)	
<input type="text"/>	- select -	<input type="text"/>	- select -	<input type="text"/>	<input type="text"/>
OR				Time <input type="text"/> (Clear)	

Thank

- ▣ **Who do I thank?**

- ▣ Contact record
- ▣ Soft credit

- ▣ **How can I thank hundreds of donors quickly?**

- ▣ Send an email
- ▣ Message templates
- ▣ Tokens
- ▣ Print to PDF
- ▣ Thank you sent
- ▣ Campaigns

Example template

Individually Written Letter

April 7, 2012

John Doe
111 Main Street
San Francisco, CA 94107

Dear John,

Thank you on behalf of The Charitable Organization board and staff for your generous contribution to our work. We received your \$1,000.00 donation on April 5, 2012. Your strong support will allow us to start a program

Personalized Letter with Tokens

{date}

{contact.first_name} {contact.last_name}
{contact.street_address}
{contact.city}, {contact.state} {contact.zip}

Dear {contact.nick_name},

Thank you on behalf of The Charitable Organization board and staff for your generous contribution to our work. We received your \${contribution.last_amount} donation on {contribution.last_received}. Your strong

Supporters can do a lot for you

- ▣ Subscribe to EFFector
- ▣ Take action in response to an action alert
- ▣ Make good decisions in their workplace
- ▣ Attend events
- ▣ Help the tech team
- ▣ Intern
- ▣ Co-counsel a case
- ▣ **Donate personally or encourage someone else to donate**

Custom fields you might want

Custom Field	Field Type	Examples
Relationship to Organization	Alphanumeric: Multi-Select	Board Member, Former Board Member
Engagement Level	Alphanumeric: Select	None, Low, Medium, High
Donor Type	Alphanumeric: Multi-Select	Academic, Lawyer, Artist
Interest Area	Alphanumeric: Multi-Select	In-Class, After School Programs

Engagement Level	
None	Someone we entered in the database, perhaps at the recommendation of a staff member or friend of the organization
Low	Someone who signed up for a membership or subscribed to a public mailing list
Medium	Someone who has attended an event or opted-in to receive major donor mailings
High	Someone we know very well, who would be happy to give more if we asked or invest time in helping the organization



Engagement Level index under activities in core, that can be added up with CiviEngage (?)

Ask Again

- ❑ **How else can I grow the relationship?**
 - ❑ Event invitations
 - ❑ Groups (ie. Mailing lists)
- ❑ **What do I ask them for this time?**
 - ❑ Activities
 - ❑ Notes
- ❑ **How do I ask hundreds of people at once?**
 - ❑ Groups (ie. Mailing lists)
 - ❑ Message templates
 - ❑ Tokens
 - ❑ Send a mailing

Wait!



- ▣ How do I know this is working?

- ▣ Reports

- ▣ What should I be looking for?

- ▣ Acquisition
- ▣ Retention
- ▣ Upgrade
- ▣ Face to face time
- ▣ Multifaceted fundraising efforts

Donor Summary (Repeat)

LYBUNT/SYBUNT

Donor Summary (Repeat)

Activities

Campaigns

In the works

- ▣ More soft credit features
 - ▣ Thank you Wikimedia
- ▣ Ambassador program

Thank you for improving CiviCRM!



The cat comes from fuffer.wordpress.com