



I'm Sherry Quam Taylor.
(And I'm glad you're here.)



HOW TO:

Fund All The Big Ideas In Your Strategic Plan

(Without Adding More Events, Grant Applications, Or Appeals)



Does your Nonprofit Need More Money?

(that's a serious question)



Nonprofits don't just need More Money. You need more **Flexible Money**.



Great
Flexibility from
**Unrestricted
Dollars**



From
Decision-makers
you have direct
access to



Who are
stakeholders who
WANT to give you
larger gifts




Who are
invested in
giving annually



(So, what's the issue?)

**Most organizations that come to me
aren't doing the things that attract
donors who would give in this way.**



A large iceberg floats in a deep blue ocean under a bright blue sky with scattered white clouds. The visible tip of the iceberg is jagged and snow-covered. The submerged portion, which is much larger, is visible through the clear water, showing a dark, solid mass. This visual metaphor represents the 'Common Symptoms' listed on the right, which are the visible tip of a much larger, hidden problem.

Common Symptoms

Tight cash-flow because of money restrictions

Reserve is too small to be helpful

Hard to ever justify overhead spend

Everyone's wearing too many hats (not enough staff)

Drained by time-consuming events & appeals

Underutilized Board

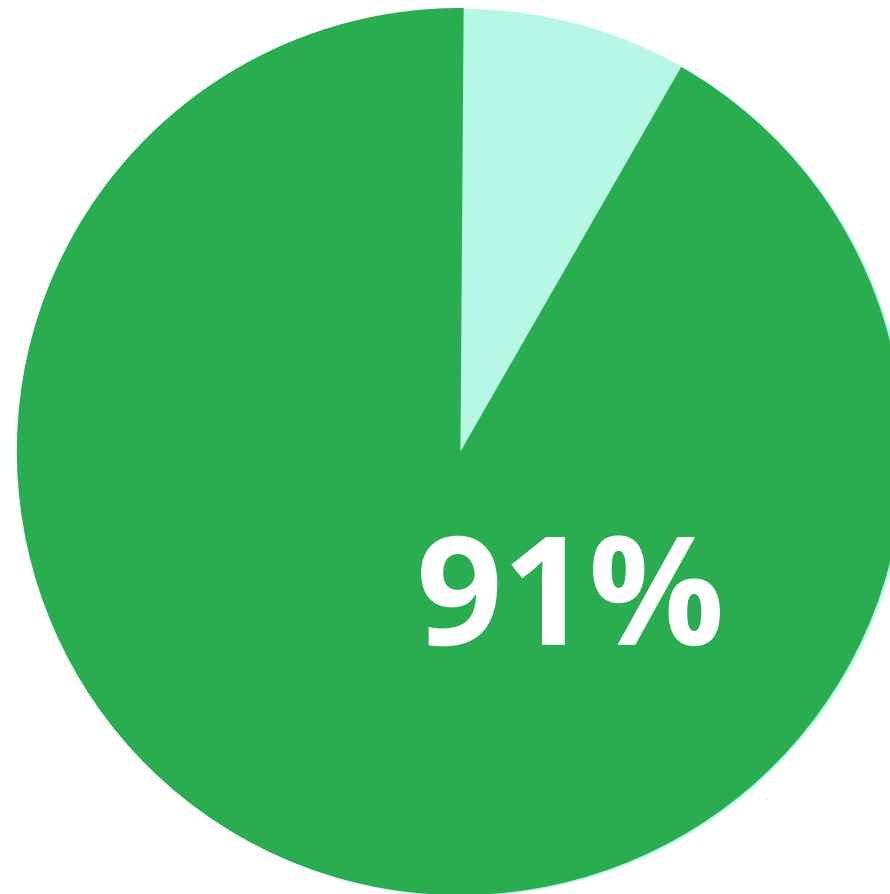
As a result, you're leaving money on the table



And how do these symptoms impact revenue generation?

1.56M ➤
US Nonprofits

The Urban Institute's Center on Nonprofits & Philanthropy (2018)

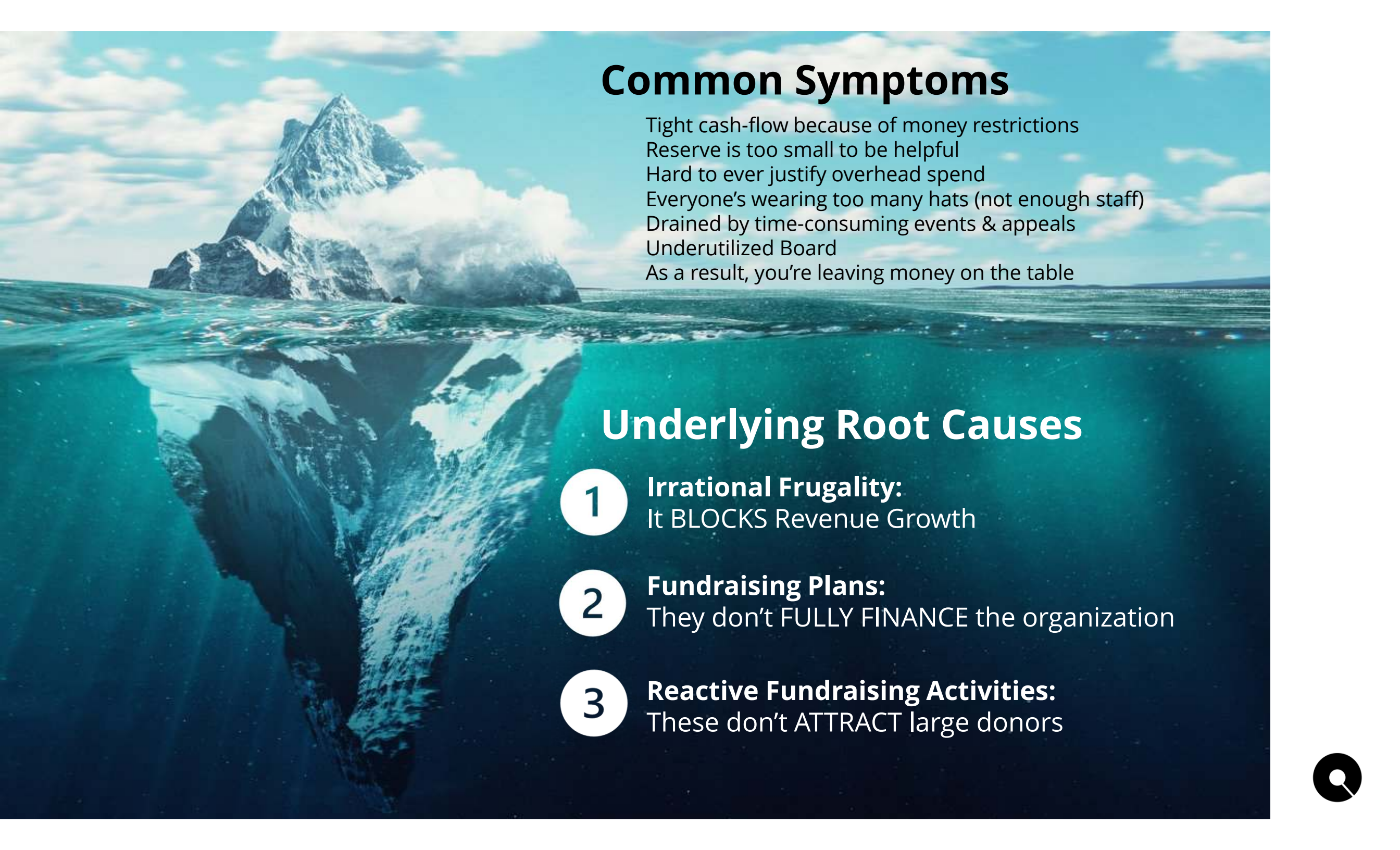


91% of nonprofits **never** reach \$5M of annual revenue.



Can I be honest?



An iceberg floating in the ocean. The tip of the iceberg, which is visible above the water, represents the 'Common Symptoms'. The much larger, submerged part of the iceberg represents the 'Underlying Root Causes'.

Common Symptoms

Tight cash-flow because of money restrictions
Reserve is too small to be helpful
Hard to ever justify overhead spend
Everyone's wearing too many hats (not enough staff)
Drained by time-consuming events & appeals
Underutilized Board
As a result, you're leaving money on the table

Underlying Root Causes

1

Irrational Frugality:

It BLOCKS Revenue Growth

2

Fundraising Plans:

They don't FULLY FINANCE the organization

3

Reactive Fundraising Activities:

These don't ATTRACT large donors



Seem too good to be true?

(I see organizations make this shift every day.)



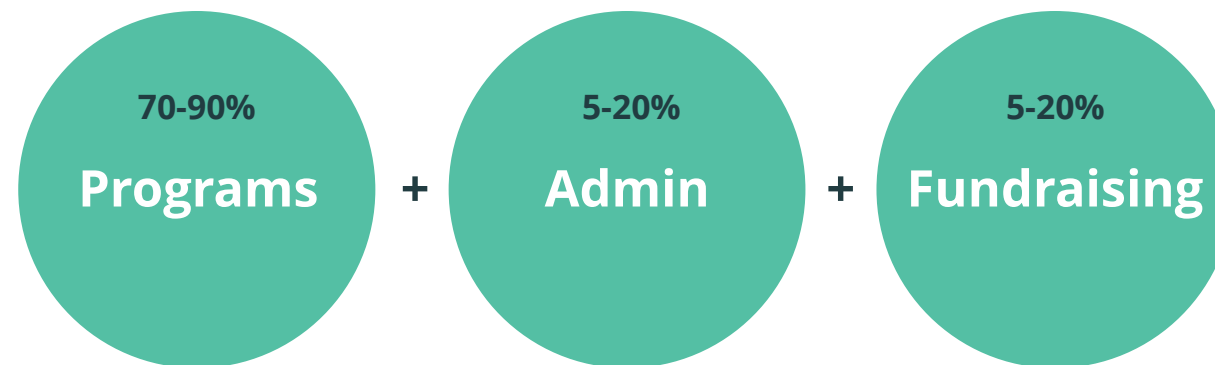
1

Overcoming Irrational Frugality

(And raising more money in the process)



Nonprofits MUST be open to investing time and spending money on **all 3 key areas of your nonprofit grow.**



Not investing in all 3 areas leaves you . . .

- **vulnerable to a funding plateau**
- **land-locked from opportunities**
- **at risk in times of crisis**



Truth:

**Investing in all areas of your
organization helps you raise more
Charitable Revenue.**



Would you believe me?

A nonprofit's growth has more to do with the leadership's approach to & comfort level with:



PLANNING



BUDGETING



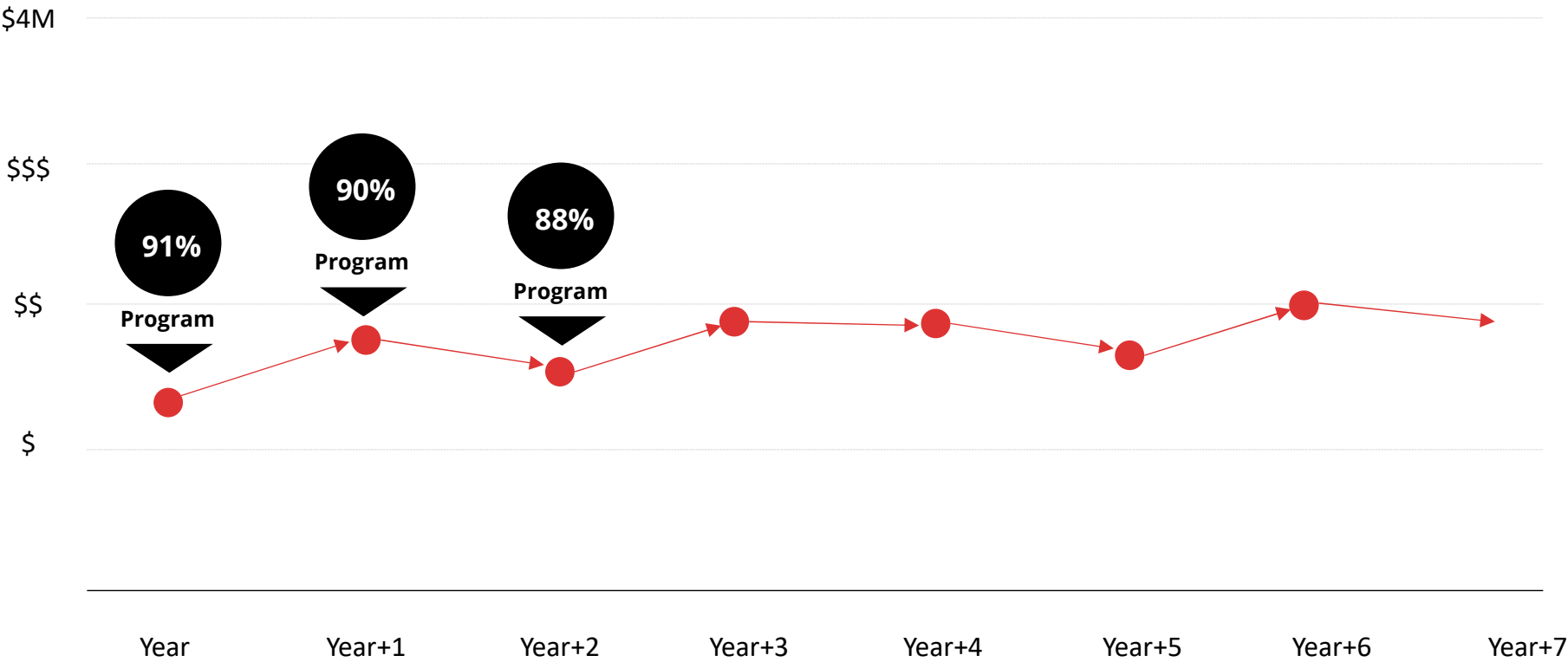
INVESTING

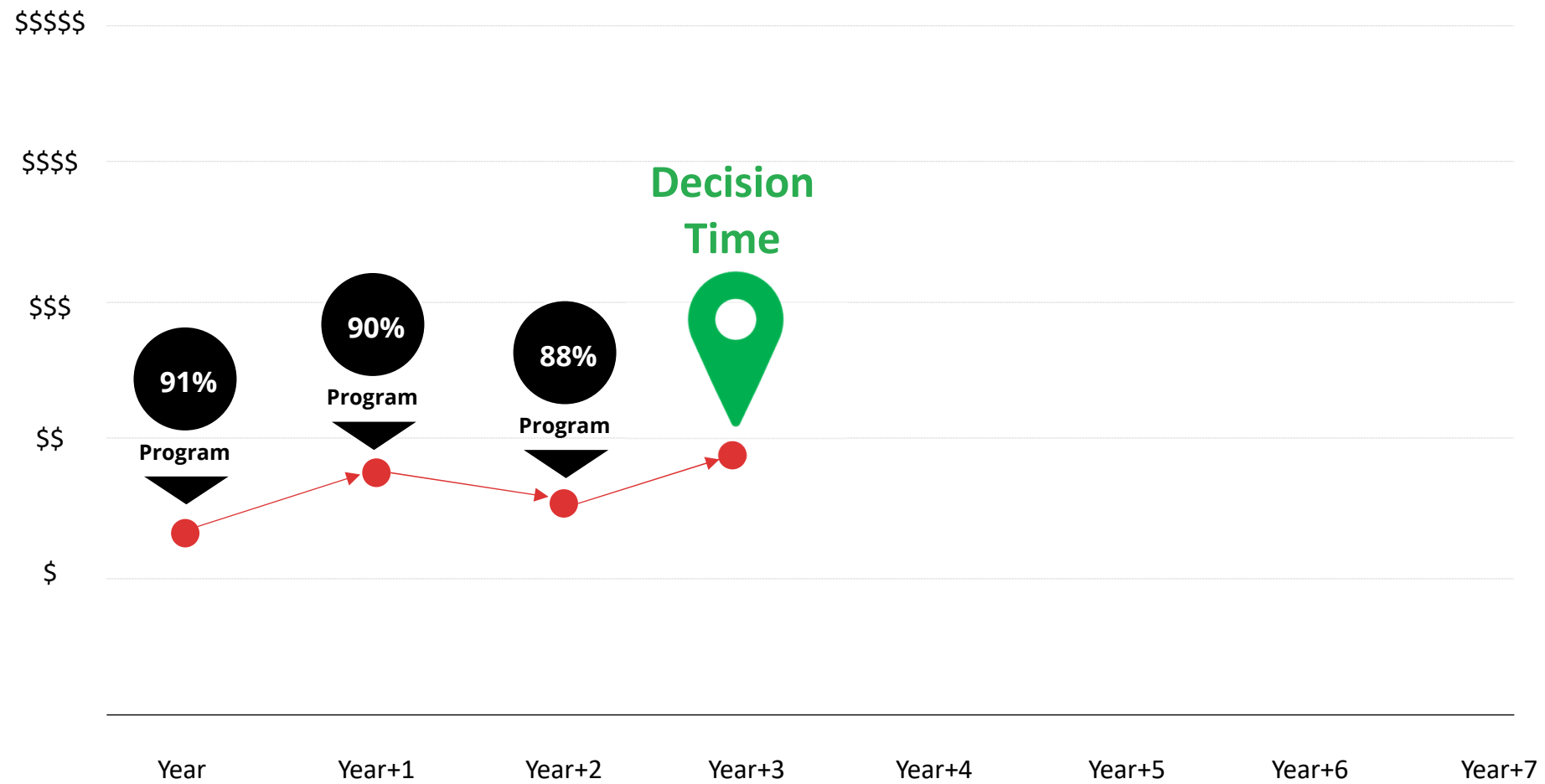


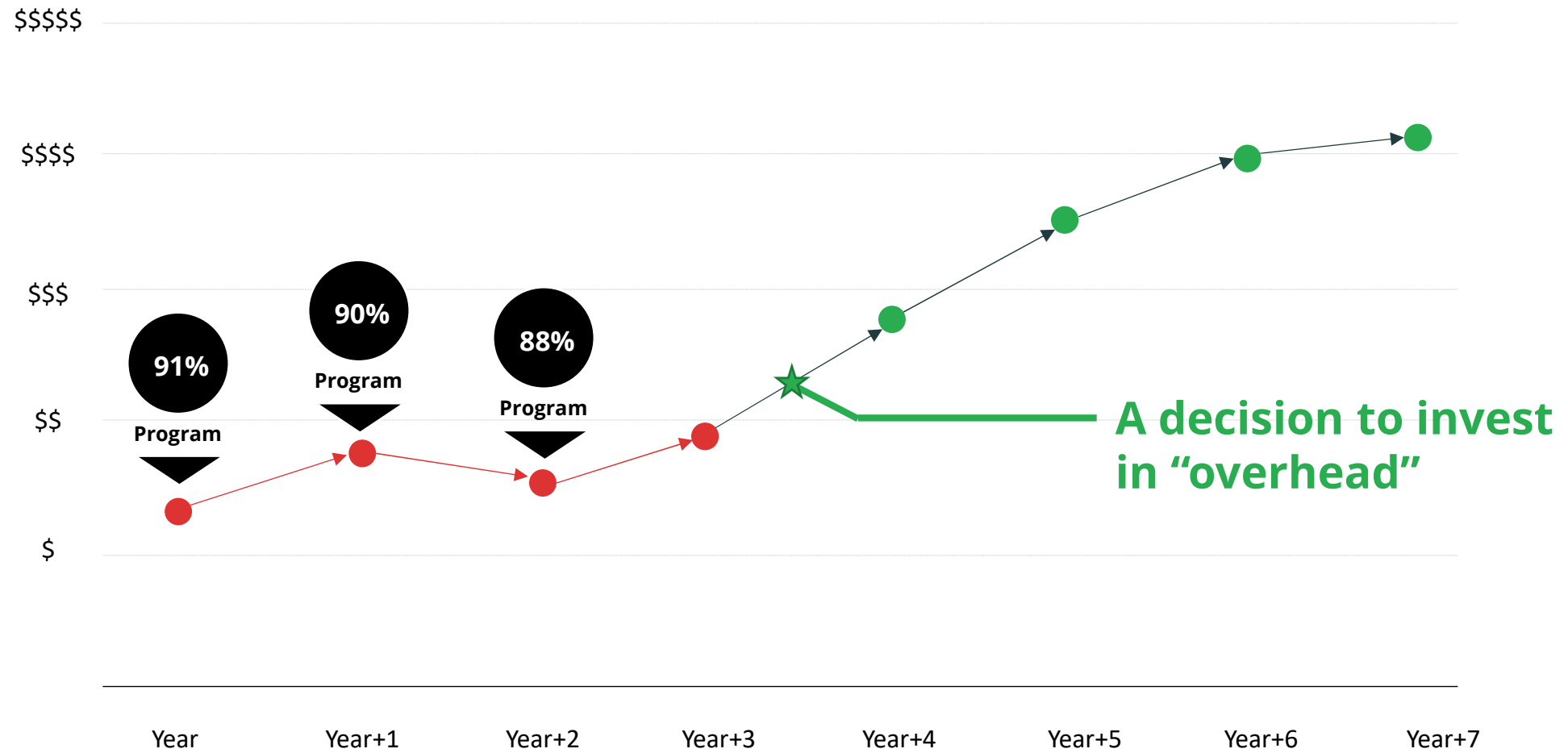
SPENDING

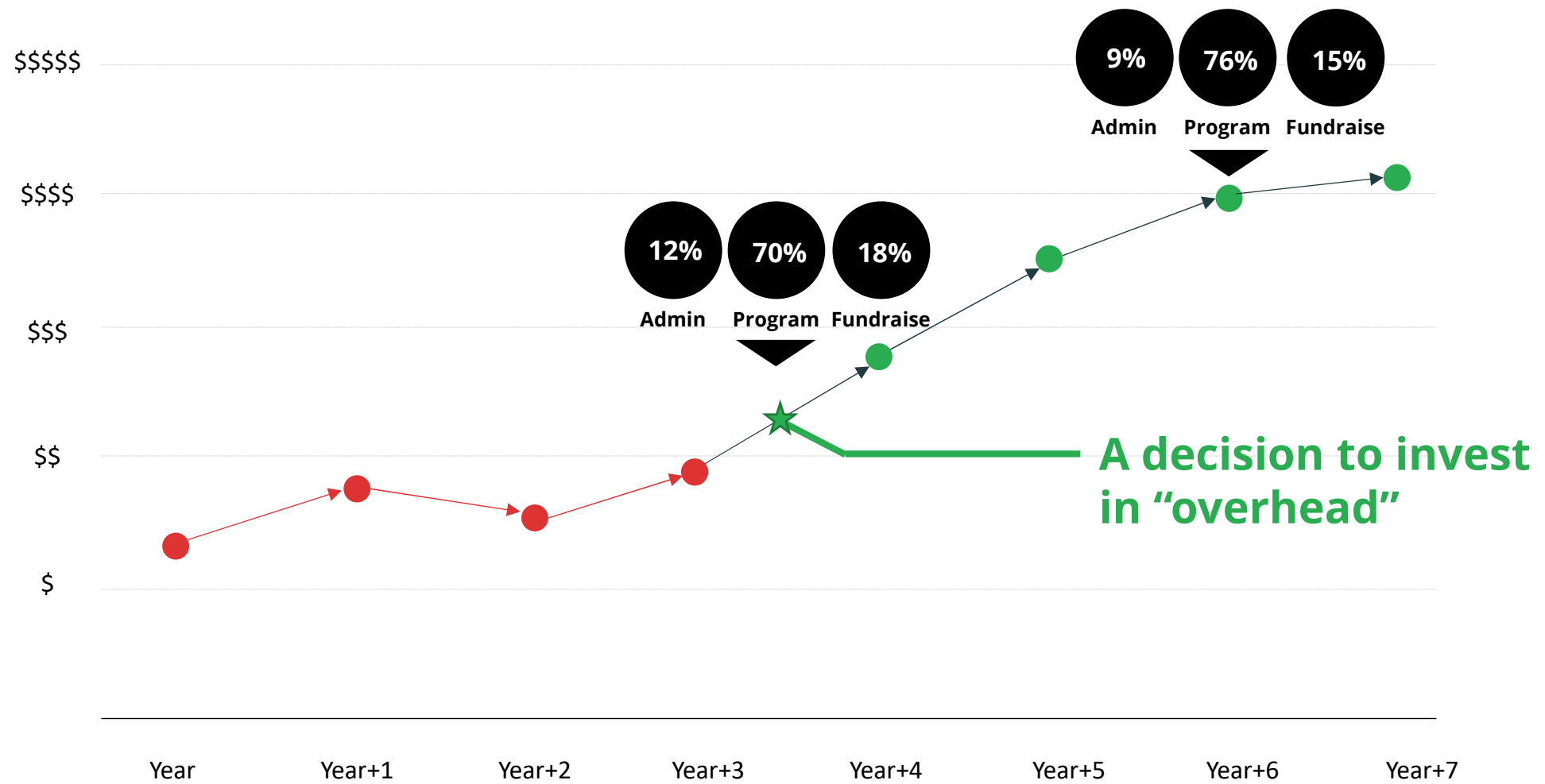


What do I mean by Irrational Frugality?











We want as much as possible to go to **programs each year!**

Won't that **look bad to donors?**

****Foundations won't fund us** with those percentages.**

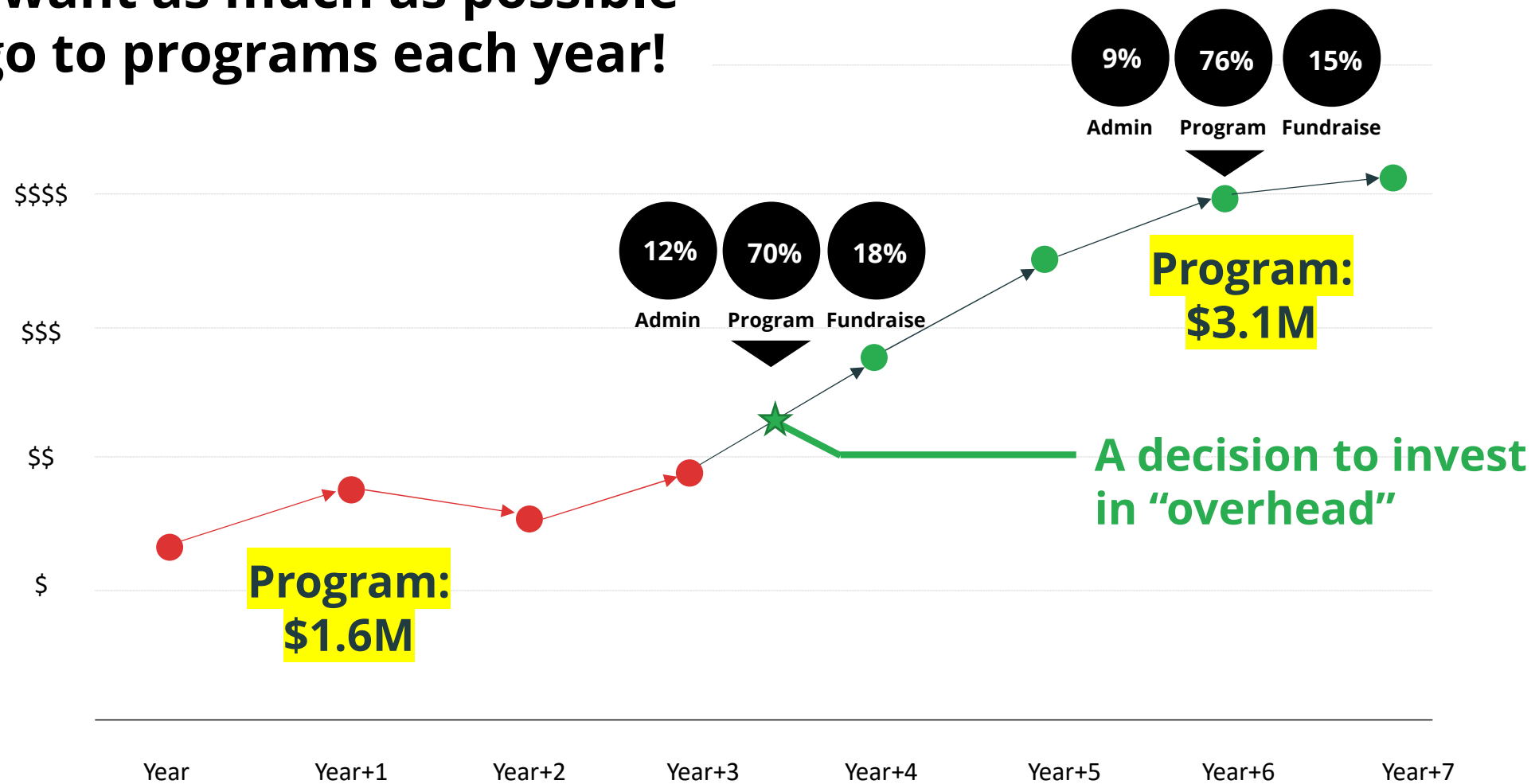
We can't spend that much on **overhead.**

The **charity ranking site will give a bad grade.**





We want as much as possible to go to programs each year!



**What KEEPS nonprofits from being
FULLY FUNDED is believing these
misconceptions.**



A large iceberg floats in a blue ocean under a cloudy sky. The tip of the iceberg is visible above the water, while a much larger portion is submerged below the surface. In the top right corner, there is a black circle containing the white number '2'.

2

Creating a Plan to Fully Finance Your Organization

(This is what Fundraising Plans get wrong)



Raising to Your True NEED is often a BIG Mindset Shift when budgeting:

If we had the money,
here's what we would do.



Here's what **we need** to
accomplish our mission.

Here's what we can do **based
upon what's committed.**



Here's what **we need** to
accomplish our mission.



**It's only when you've created a
REAL, needs-based budget that you can
design a REAL financing plan that
achieves that goal.**



When this part is done right . . .

If we had the money, here's what we would do.



Here's what we NEED to accomplish the mission.

A squeak-by budget that never gets funded.



A real budget that reflects what your organization NEEDS.

It helps you raise for programs AND growth.

An income projection that's never high enough.



A true financing plan that acts as your road map to balance your budgeted need.



Just like your expense budget, an equally systematic approach should be taken to **design the income portion of the budget.**



Remember this slide from earlier?

Nonprofits don't just need More Money. You need more Flexible Money.



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The board and leadership's TIME is one of the organization's most valuable assets.

Therefore, every hour spent fundraising must be a high ROI.



Funding Model Rooted in ROI



TIME + BUDGET



ANNUAL REVENUE



Funding Model Rooted in ROI



TIME + BUDGET



ANNUAL REVENUE



Top 10 Donors
25 – 40%

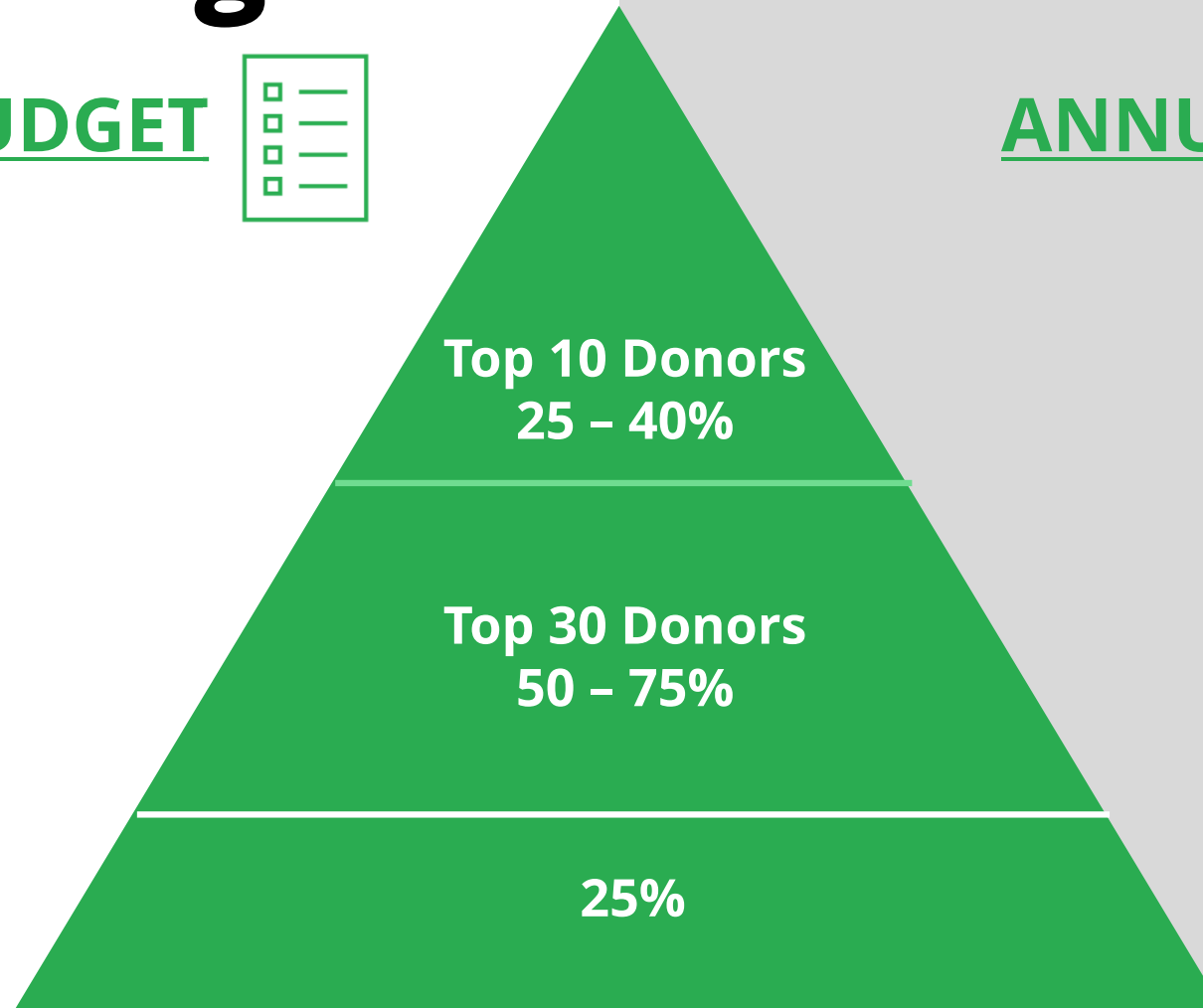
Funding Model Rooted in ROI



TIME + BUDGET



ANNUAL REVENUE



Funding Model Rooted in ROI



TIME + BUDGET

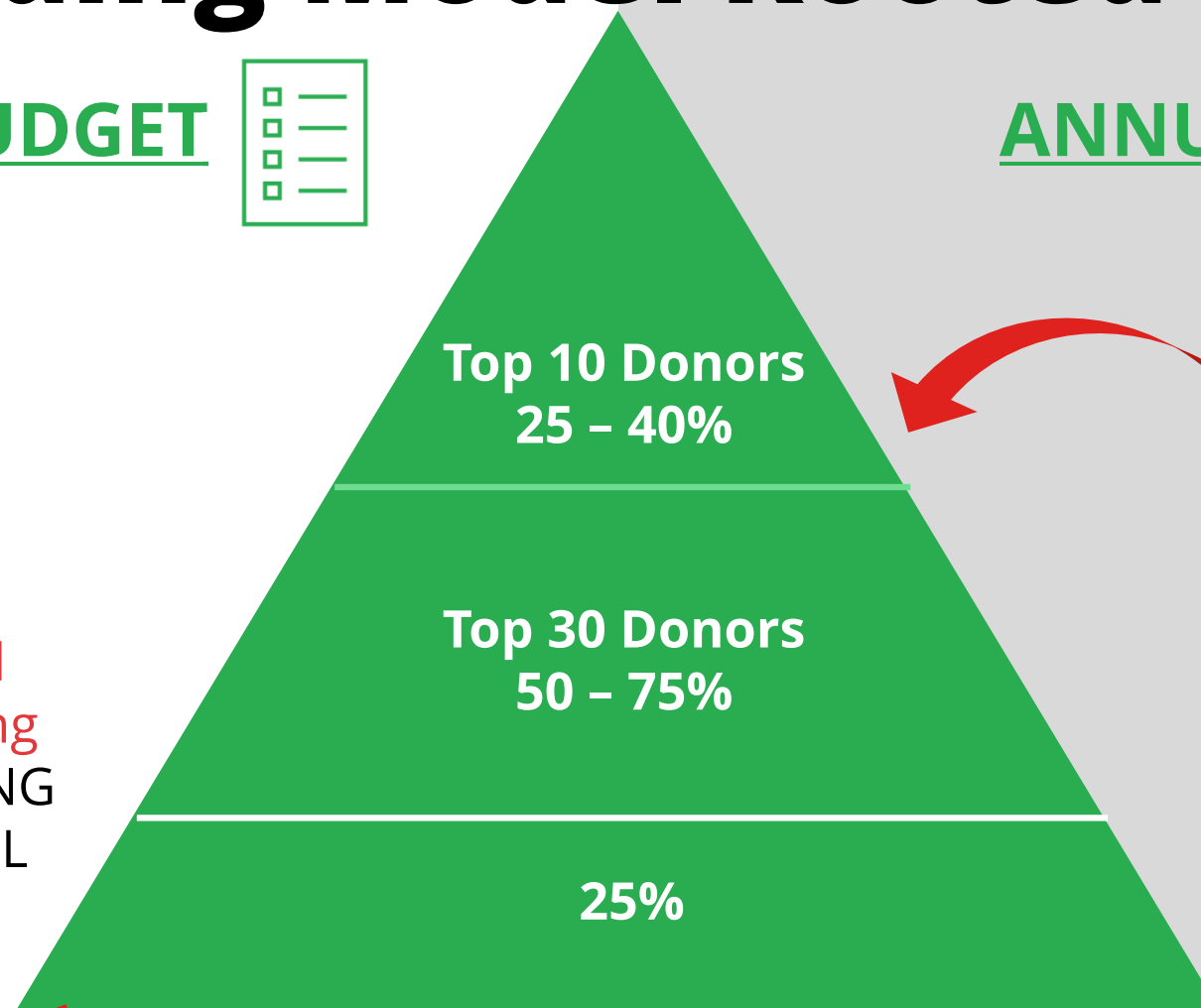
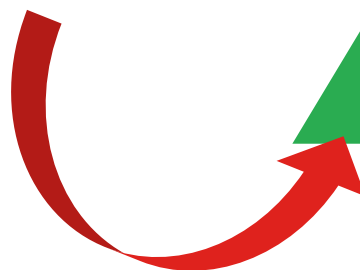


ANNUAL REVENUE



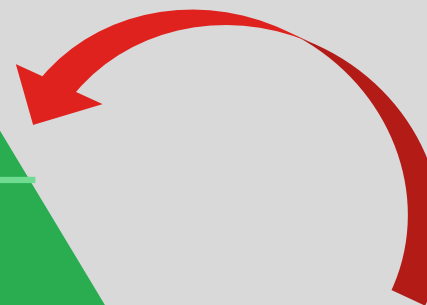
CAUTION:

Be careful not to spend most of your fundraising time and budget RAISING TRANSACTIONAL SMALL GIFTS.



CAUTION:

Be careful not to spend most of your fundraising time and budget RAISING RESTRICTED GIFTS.



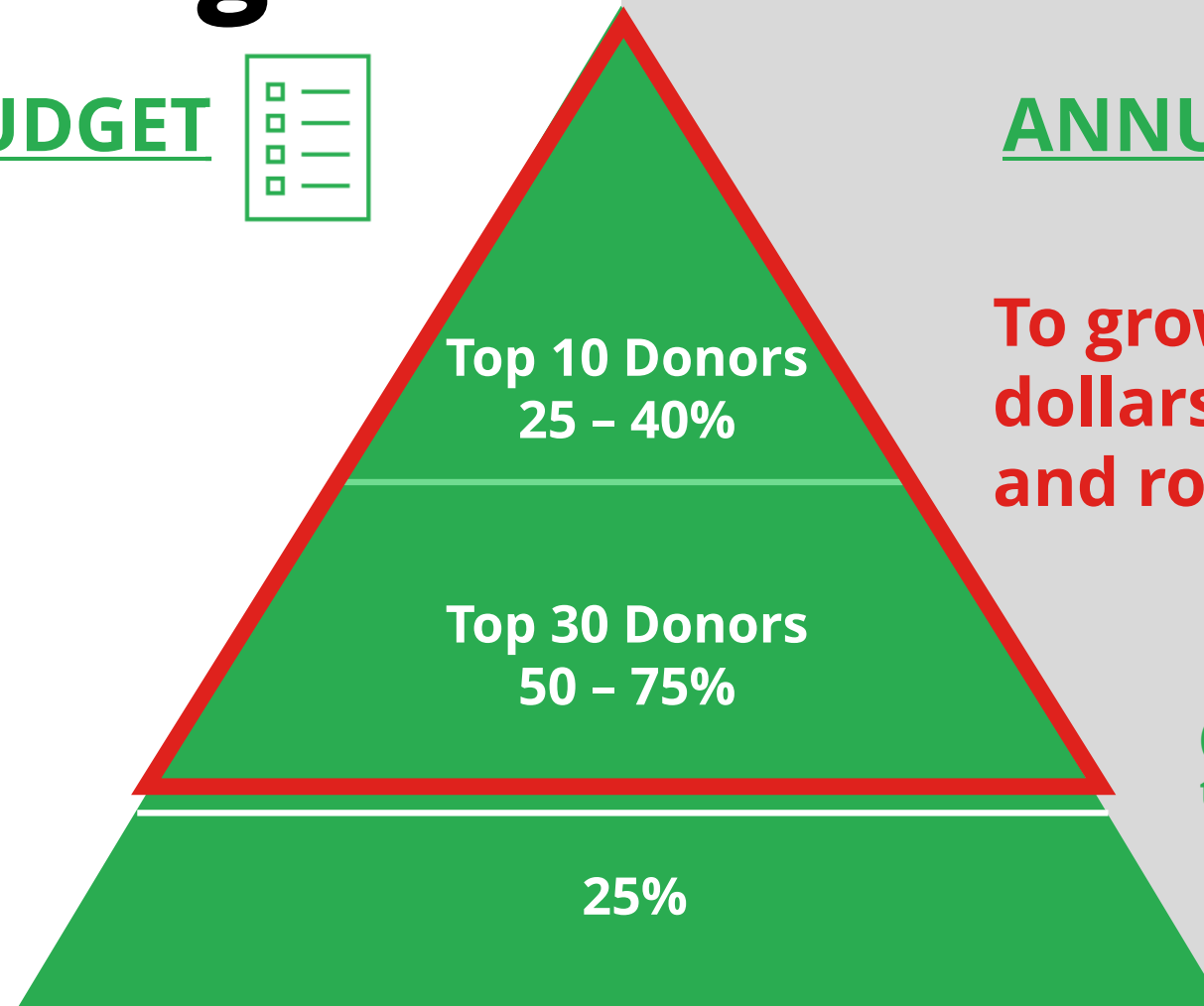
Funding Model Rooted in ROI



TIME + BUDGET



ANNUAL REVENUE



To grow, most of these dollars must be unrestricted and rooted in relationships.

- Individuals
- Private Family Foundations
- Private Businesses

(Single Source Decision Makers through one-on-one solicitations)

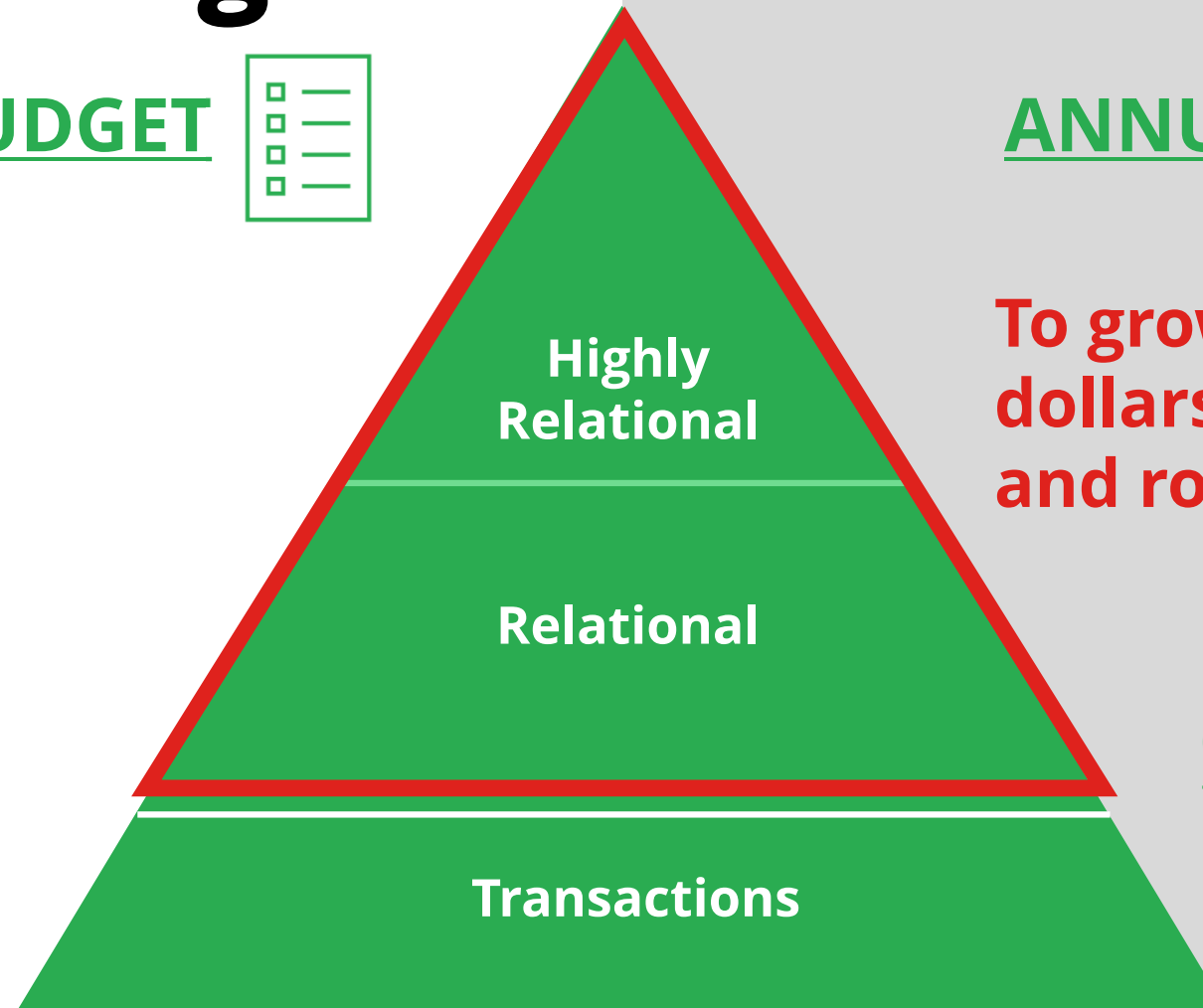
Funding Model Rooted in ROI



TIME + BUDGET



ANNUAL REVENUE



To grow, most of these dollars must be unrestricted and rooted in relationships.

- Individuals
- Private Family Foundations
- Private Businesses

(Single Source Decision Makers through one-on-one solicitations)

- Application-based
- Contracts
- Appeals/Campaigns/Events
- Social Media Fundraisers

3

Shifting into Proactive, Relationship-based Fundraising

(Attracting Investment-level Donors)



Your goal . . .

Lead donors to give their:

best gift + every year



**With this approach, everyone is
empowered to align **ACTIVITES** with
DOLLARS.**





News



E-Appeal



Mailed
Appeal

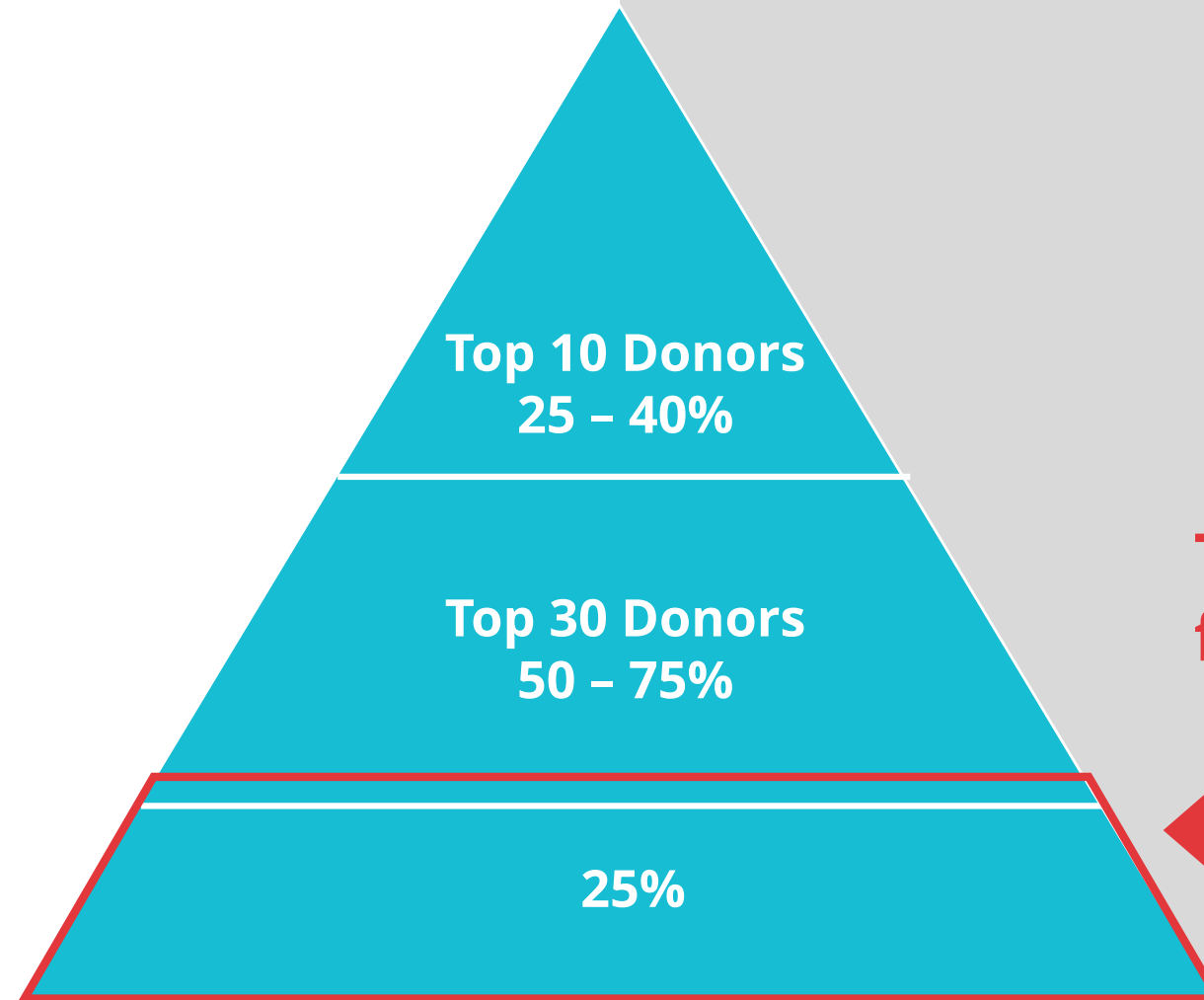


Events

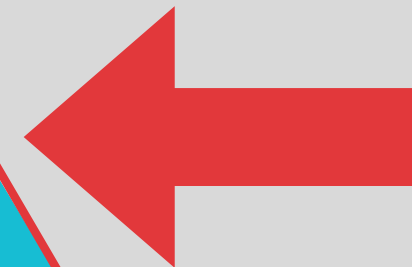


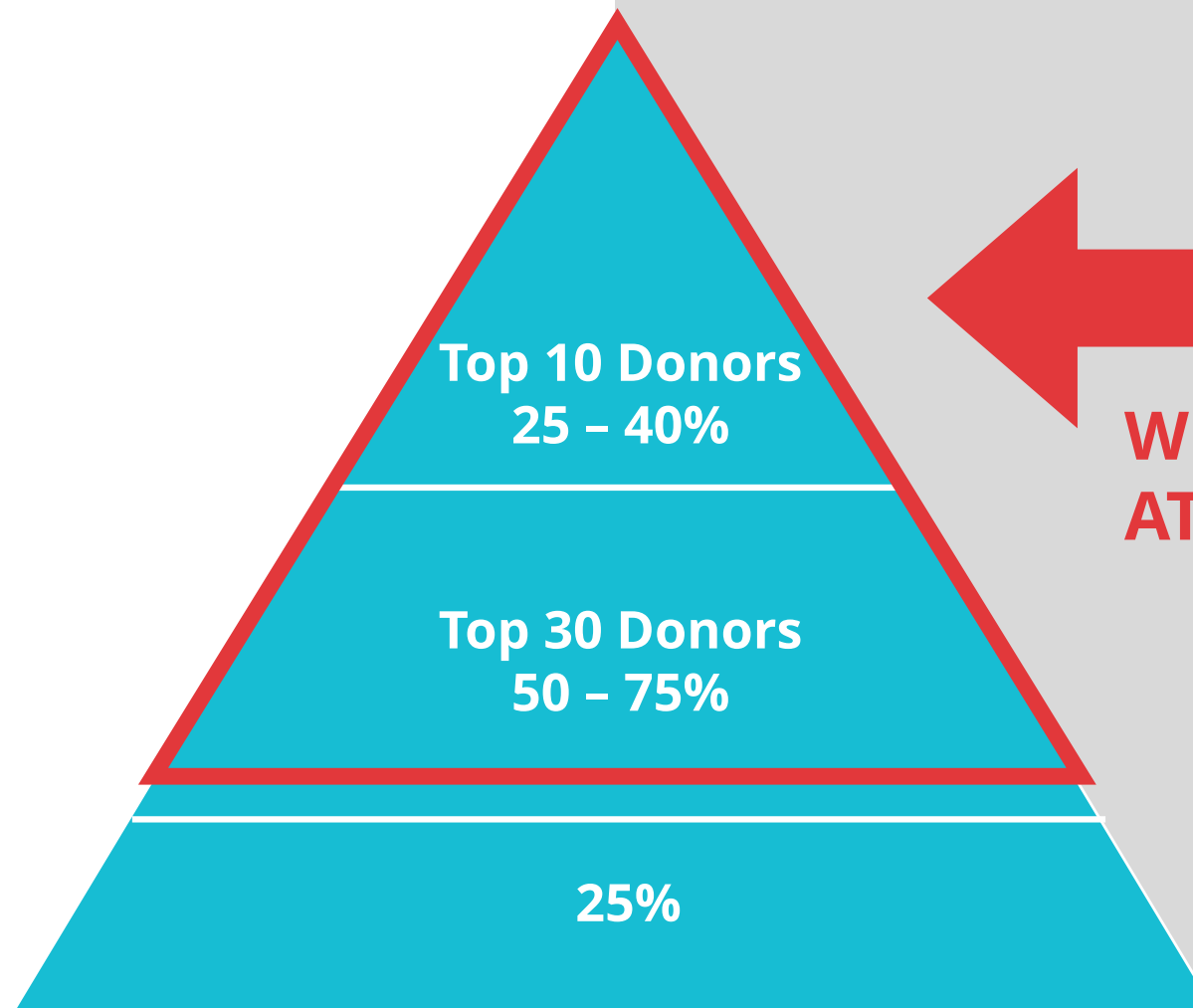
Annual
Report





**That cadence is great
for very specific donors**

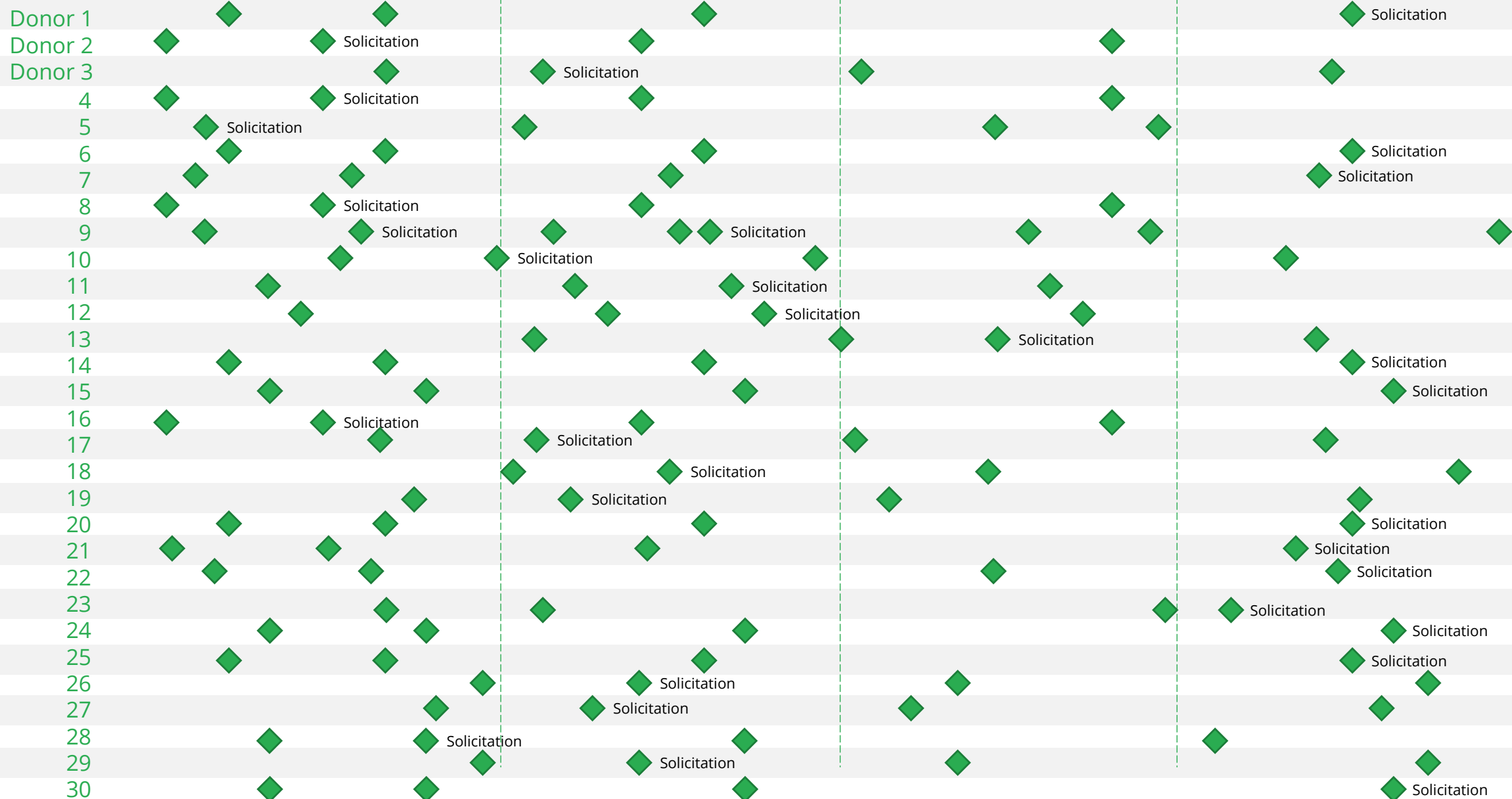




**What does it take to
ATTRACT these donors?**

Exclusive
Customized
Donor-Focused





Too many fundraisers avoid these activities.



Just because you're amazing at growing the programs, writing grants, planning events . . . **you may struggle LEADING large donors through investment-level conversations.**





CASE STUDY: Jonathan

Executive Director of LINK Unlimited Scholars

**“Our donors are not giving
their best gifts.”**





Because of the new Methodology . . . Jonathan

- ✓ Has a donor-segmented Financing Plan to match his aggressive growth plans.
- ✓ Consistently finds and secures 6-figure gifts from donors who previously didn't understand how to help.
- ✓ Has a high-performing development team that knows how to align hours w/dollars (& supports the board to do the same).
- ✓ Today he attributes raising DOUBLE the revenue of \$10K + to the methodology I'm sharing with you today.

Growth: Gifts over \$10K+

FY 2019

42



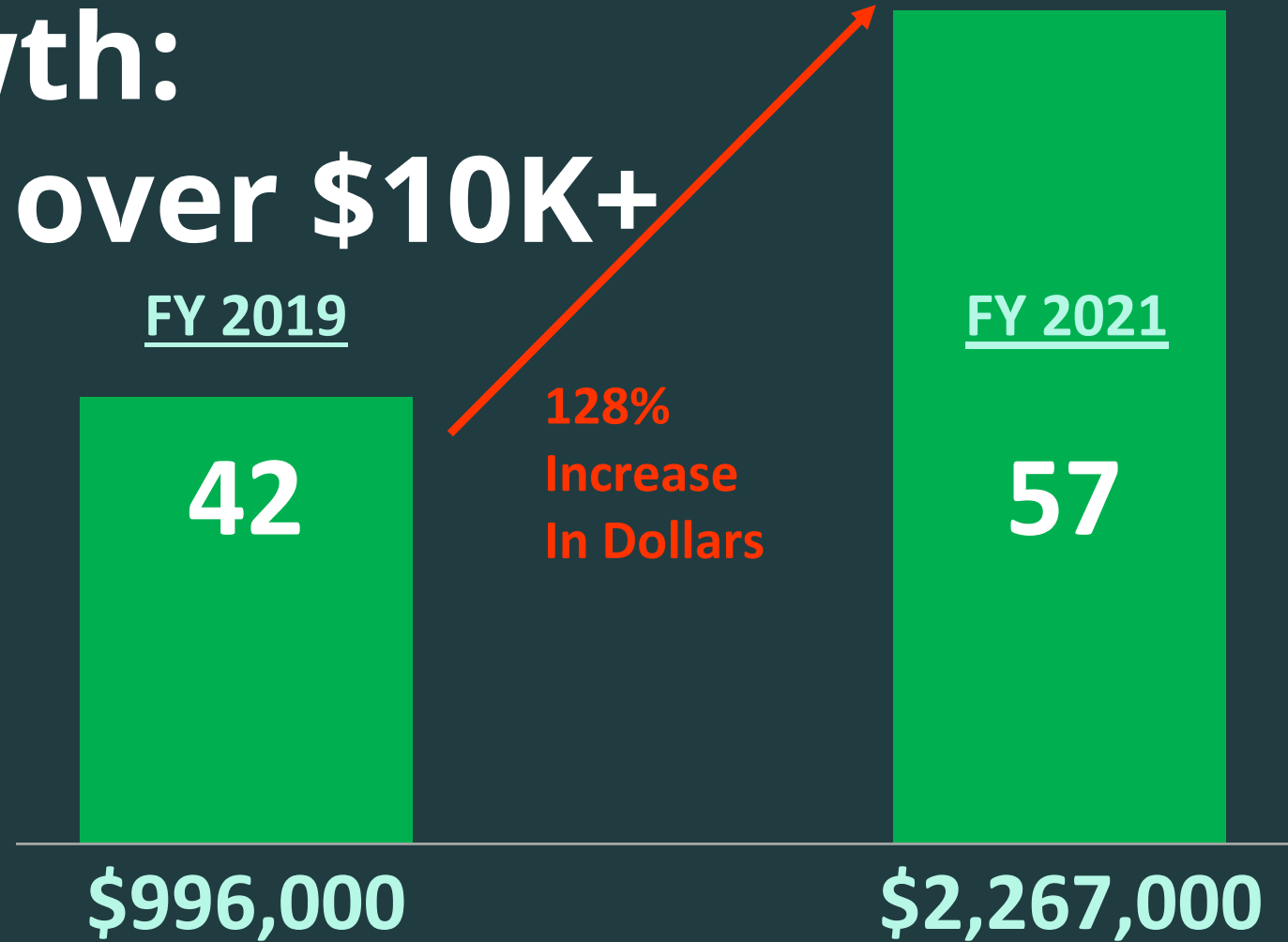
FY 2021

57



↑ 35%
Increase
In Quantity
of Donors

Growth: Gifts over \$10K+



INDIVIDUALS

FY 2019

Weren't having
investment-level
conversations to solicit
individuals

\$996,000

FY 2021

Prioritized the time it takes
to guide large donors to
strategic solicitations.

\$2,267,000

BUSINESSES

FY 2019

Relied on
Transactional
Sponsorships

\$996,000

FY 2021

Prioritized building
relationships with businesses
who were mission-aligned

\$2,267,000

FAMILY FOUNDATIONS

FY 2019

Relied on
Transactional
Applications

\$996,000

FY 2021

Started treating them like
humans – served them and
exceeded their expectations

\$2,267,000

Can I be honest?

I see so much money left on the table when fundraisers have not been equipped to LEAD larger donors to their best gift.



Successful fundraisers share the true financial NEED and then ask for that NEED.



An iceberg floating in the ocean. The tip of the iceberg is visible above the water, while the much larger base is submerged underwater. The sky is blue with white clouds.

3

Your final takeaways...

Successful Organizations Address Underlying Root Causes

1

Irrational Frugality:
It **BLOCKS** Revenue Growth

2

Fundraising Plans:
They don't **FULLY FINANCE** the organization

3

Reactive Fundraising Activities:
These don't **ATTRACT** large donors



A large iceberg floats in a teal ocean under a blue sky with white clouds. The visible tip is jagged and snow-capped, while the submerged portion is a massive, dark, and jagged block of ice, illustrating the concept of the 'tip of the iceberg'.

Q & A

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