Fundraising: How PCTA Developed and Implemented a Fundraising Program

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Course Description

- learn about PCTA’s fundraising program that raises close to $1 million in cash contributions annually.
- Information will be applicable to all sizes and types of trail organizations.
- learn how to identify, involve, cultivate and steward individual donors.
- participants will have access to sample appeal letters, thank you letters, fundraising plans
- tips for involving board members in fundraising.
- learn about the importance of infrastructure and some low cost infrastructure tools.
- What do you want to learn today?
- Ask questions, learn from each other
My 90 day assessment – 12 years ago

- Talked with 30 people
- What I heard:
  - keep the organization going
  - raise more money to:
    - add more staff to get more work done for the trail
    - maintain strong relationships with agencies
# PCTA Then & Now

<table>
<thead>
<tr>
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<tbody>
<tr>
<td><strong>Budget</strong></td>
<td>$350,000</td>
<td>$1,800,000</td>
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<tr>
<td><strong>Private</strong></td>
<td>$300,000</td>
<td>$1,000,000</td>
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<tr>
<td><strong>Members</strong></td>
<td>3,900</td>
<td>8,000</td>
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<tr>
<td><strong>Volunteers</strong></td>
<td>200 (?)</td>
<td>1,700</td>
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<tr>
<td><strong>Vol Hrs</strong></td>
<td>30,000 (?)</td>
<td>85,000</td>
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<tr>
<td><strong>Staff</strong></td>
<td>3</td>
<td>17+</td>
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PCTA Staff & Board in 2001

- **Staff** – me, trail person, admin assistant

- **Board** – long list of names, 8 or 9 active
PCTA - First step

- Have board members raise money to address basic needs:
  1. Donor database
  2. Financial audit
  3. Upgrade accounting software
Board fundraising campaign

- $25,000 goal
- Raised $30,000
- Board members learned:
  - how to ask
  - how to raise money from individuals
  - importance of infrastructure
  - importance of celebrating success
What is needed for success

- Relevant mission & achievable vision
- Respected leaders, active volunteers, interested members
- Financially responsible organization
- Board members & volunteers willing to fundraise
- Board members must be the first to give
- Strategic plan is helpful
Next step

- Get tools in place to build private donorbase
  - had to convert old database
  - converted everything to new database
    - members
    - donors
    - volunteers
    - agency partners
    - congressional staff
Importance of database

- Thanking and acknowledging donors
- Tracking giving
- Communicating how their gift was used
Some fundraising basics

All philanthropic giving - USA

- Individuals  86%
- Corporations  8%
- Foundations  6%
Donor pyramid

- Occasional donors & event participants
- Recurring & annual donors
- Major donors
Fundraising from individuals - Identify

- Start with those closest to you
  - Sara’s letter
  - family & friends

- Every organization has family & friends
  - Board members
  - Volunteers
  - Staff
story of Bud Reid

- got involved because of Pete Fish
- if Pete was so involved – it must be worthwhile
- if you need anything, please ask me
- PCTA needed a phone system
- Bud bought our copier
- What Bud wanted for PCTA – donor intent
How PCTA recruits new members

- Any way we can
  - through the mail — not completely dead - yet
  - through those who are already involved
    - gift memberships
  - volunteer program — many are not members yet
  - web site
  - store
  - events
Involve, Cultivate, Steward

What We Do:

- telephone calls to donors/members by staff and eventually by board members
- thank and let them know how gift is being used
- get to know them, they get to know us
- visit, invite to events
- thank them for support
- keep them in the loop
Most effective ways to ask

- first we asked by letters — even with board members but sometimes we forgot to ask board members (those closest)

- then we asked by telephone

- now we are doing more asking in person — most effective
Appeal letters & thank you letters

Appeals/Membership Renewals

- Personal
- Consistent

Thank Yous

- Personal
- Timely
- How your gift is being used
- Meet IRS requirements
PCTA Programs – added one by one

- Workplace giving
- Matching gifts
- Crest Circle
- Annual Fund
- Major donor
- Board giving
- Memorials, gift memberships, honorariums
- Corporate & Foundations
- Planned Giving
Make it convenient

- Check
- Credit Card
- Web site – fewer clicks the better but must make the case for support compelling
- Gifts of stock
- Bequest instructions available
- Envelopes in magazine & available if requested
Fundraising plans

- Keep it simple
- Write down what to do when
- Calendar of activities most important
- For all volunteer groups – find that one person willing to take this on
How to involve board members

Fundraising committee
  - Importance of staff & board working together
  - This committee different than most board committees

Thank you calls – great place to start
  - Contact reports
  - Handwritten notes or personal email messages
Importance of infrastructure

- With database – set up to merge data and thank you letters
- Keep contact information updated
- Use to personalize appeal letters
- Generate email lists
- Good systems necessary for success
Resources

PCTA materials:
- sample appeal letter
- sample thank you letter
- fundraising plan

Association of Fundraising Professionals
- local workshops, classes

Local Nonprofit Resource Centers
- San Francisco has CompassPoint
- Sacramento has Nonprofit Resource Center
Low Cost Donor Management Systems

- CiviCRM – open source/freely available
  http://civicrm.org
- DonorPerfect Express – $59 per month
  www.donorperfect.com
- eTapestry Starter – $99 per month
  www.etapestry.com
- GiftWorks Standard – $99 per month/$499 setup fee
  www.giftworksconnect.com
- NetSuite – eligible organizations can request software donation
  www.netsuite.org
Open Discussion

- Questions
- Concerns
- Obstacles
- Opportunities

Just Ask!