

PMA Patton McDowell
& Associates, LLC

**Fund Development Counsel
& Organizational Strategy
to elevate your cause.**

Creating a Roadmap for Success

Donor Identification: The Search for New Supporters

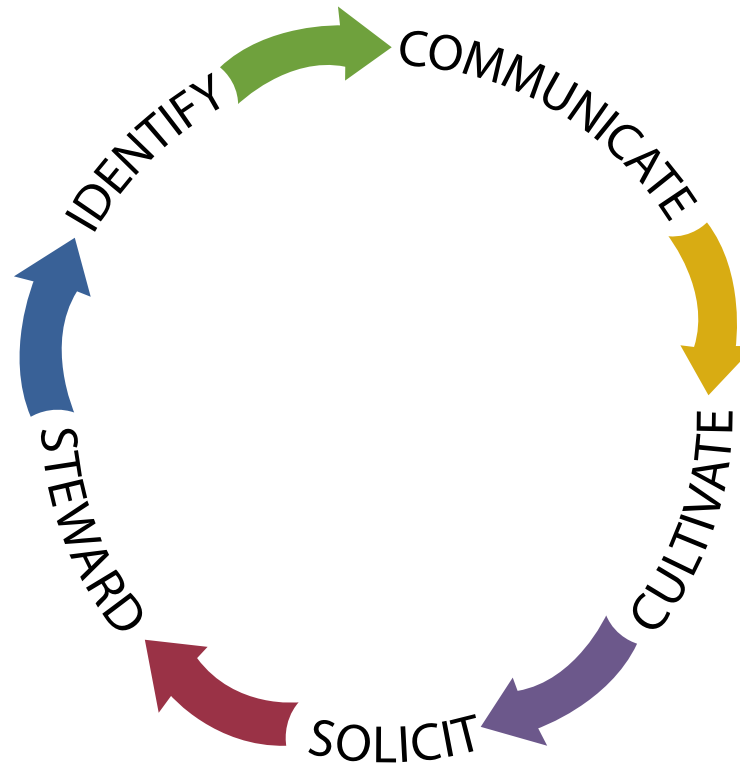
October 6, 2011

*Creating a Roadmap for Fundraising Success:
A Three-Part Workshop Series on the Development Cycle*

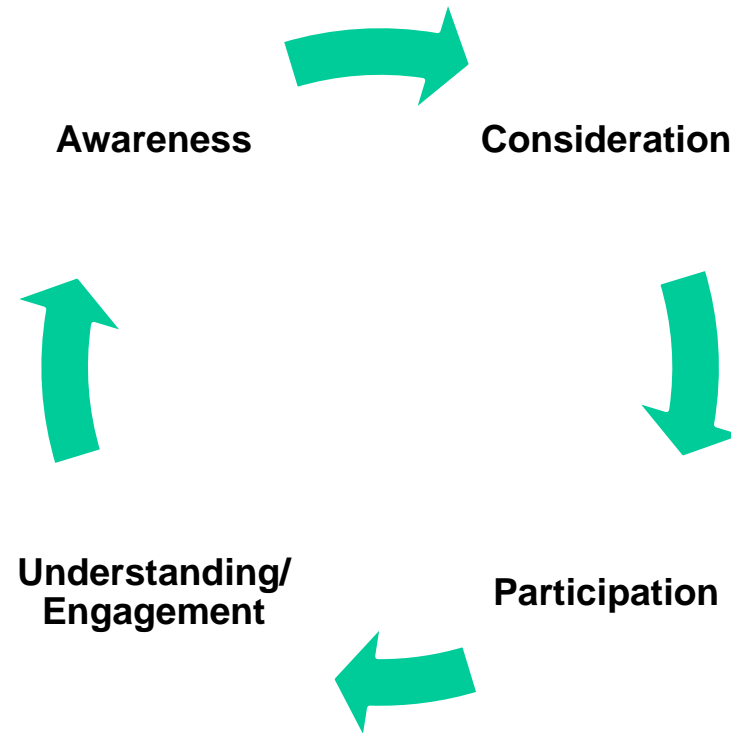
Goals

- Review development cycles: resource & audience
- Explore concept of “data flow”
- Discuss methods of identifying potential donors
- Enhance prospect research in your organization

Resource Development Cycle



Audience Development Cycle

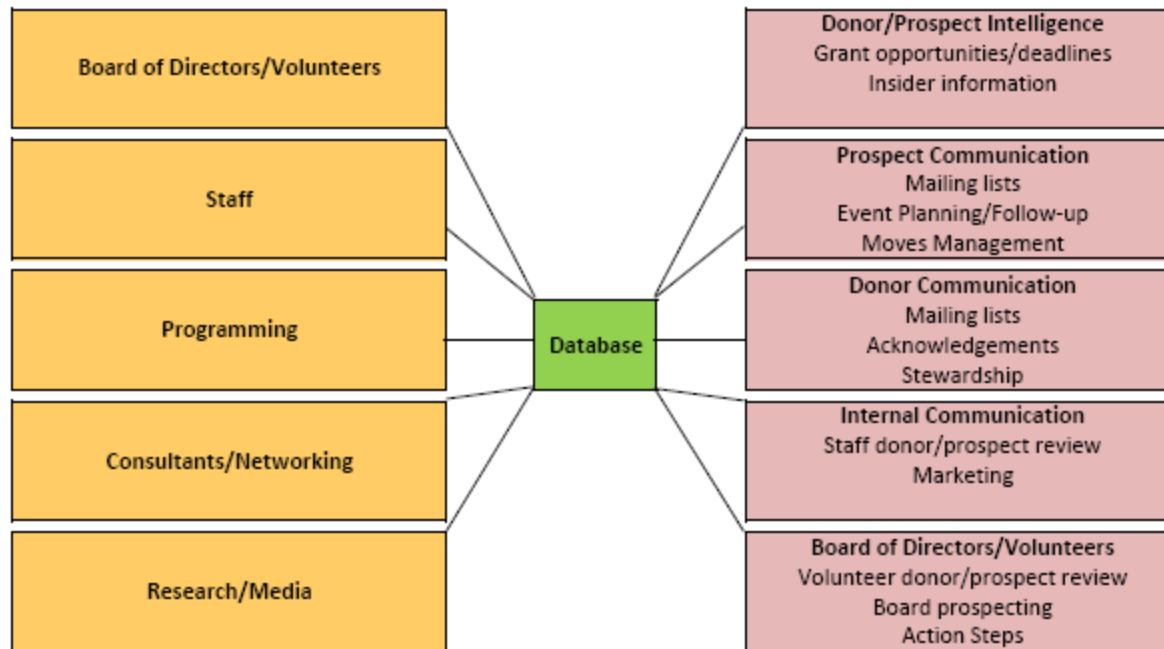


Data Flow

Definition: How the exchange of information is processed and analyzed by an organization

“A database is only as useful as the flow of data that populates it and the reports it generates.”

Data Flow



Data Flow

Examples of Inputs

- Participation: Purchase/Attendance
- Referral: Stakeholder, Other Participant
- News: Traditional and New
- Research: Primary & Secondary
- Opt-In: Surveying, Social Media

Data Flow

Examples of Outputs

- Segmented Lists
 - Board-connected
 - Staff-researched
 - Data-delineated
- Statistics & Evaluation
- Research Profiles

Individuals

Current Environment

- Critical need exhaustion
- Significant concern for those in retirement
- The “next generation” of philanthropist is relatively unknown
 - 45-60 years old
 - New Charlotteans
- Generational transfer of wealth
 - Boston College study, \$4 trillion between 1998 and 2052

Individuals

Sources

- Audiences (Grateful Patron)
- Programming Participants
- Board & Stakeholder-derived

Dispelling The Myth of the “Other Organization’s Donor”

Individuals

Research

- Internet
 - Google, LinkedIn
 - Mecklenburg Real Estate Lookup System
- New & Social Media
 - Facebook, Twitter, Blogs
- Stakeholders

Individuals

Case Study

- Indiana University (2010)
 - Classic example of “The Millionaire Next Door”
 - Frank C. Arganbright leave \$1 million estate to IU Journalism School
 - Steady low-\$ annual fund donor, never married, no children
 - "Some donors are more public than others and there's no sense that Mr. Arganbright was intending to make a splash."

10 MINUTE BREAK

Businesses/Corporate Foundations

Current Environment

- Contraction locally – trickle down from banks
- Focus on Education, Economic Development
- Cause marketing
- Philanthropy vs. Sponsorship
- Critical importance of relationships

Businesses/Corporations

Sources

- Charitable Giving
- Sponsorships
- Board/Volunteer Relationships
- Audiences/Participants

Businesses/Corporation

Research

- Creative approaches to philanthropic focus
- Marketing – brand alignment, shared populations
- Internet & Social Media
- News – seek connections to stakeholders (past & present)

Businesses/Corporations

Case Study

- Arts of the Albemarle (Elizabeth City, NC)
 - Recent PMA client
 - Corporate Sponsorship Platform – focus on consumer impressions
 - Conversation with local businesses – alignment of marketing goals
 - Focus on Impact: Cultural, Educational & Economic

Private & Family Foundations

Current Environment

- Diminished assets – approaching pre-2008 levels
- Increased need
- Donor-advised funds & charitable remainder trusts
 - Generational transfer of wealth
 - Fewer restrictions

Private & Family Foundations

Sources

- Personal connections
- Board/Volunteers
- Audiences/Participants

Private & Family Foundations

Research

- GuideStar
- FoundationSearch & Foundation Center
- Philanthropy Journal
- Other Organizations

Foundations

Case Study

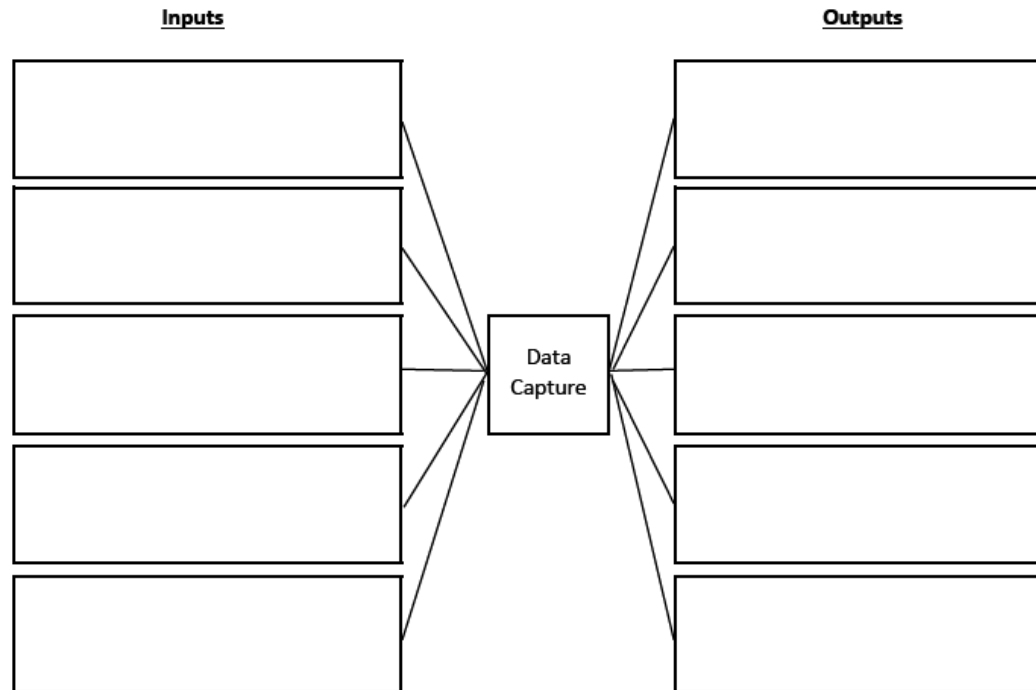
- Manhattan Theatre Club
 - Ernst C. Stiefel Foundation
 - Connected via longtime patron and colleague of Mr. Stiefel
 - Staged reading of play re: Jewish refugees
 - Multi-year support of entire program

The Ernst C. Stiefel

6@7 rehearsed
readings of
new work

Group Exercise

Data Flow Worksheet



Final Thoughts

Q&A Discussion

THANK YOU!

Patton McDowell, CFRE
PM@pattonmcdowell.com

Josh Jacobson, CFRE
JJ@pattonmcdowell.com

Please Join Us for the Rest of the Series

Creating a Roadmap for Fundraising Success:

November 10 - Cultivation: Converting Earned to Contributed

December 8 - Stewardship: More Than Just “Thank You”