

PMA Patton McDowell
& Associates, LLC

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

“Emerging Trends in Nonprofits & Philanthropy”

November 16, 2011

Objectives

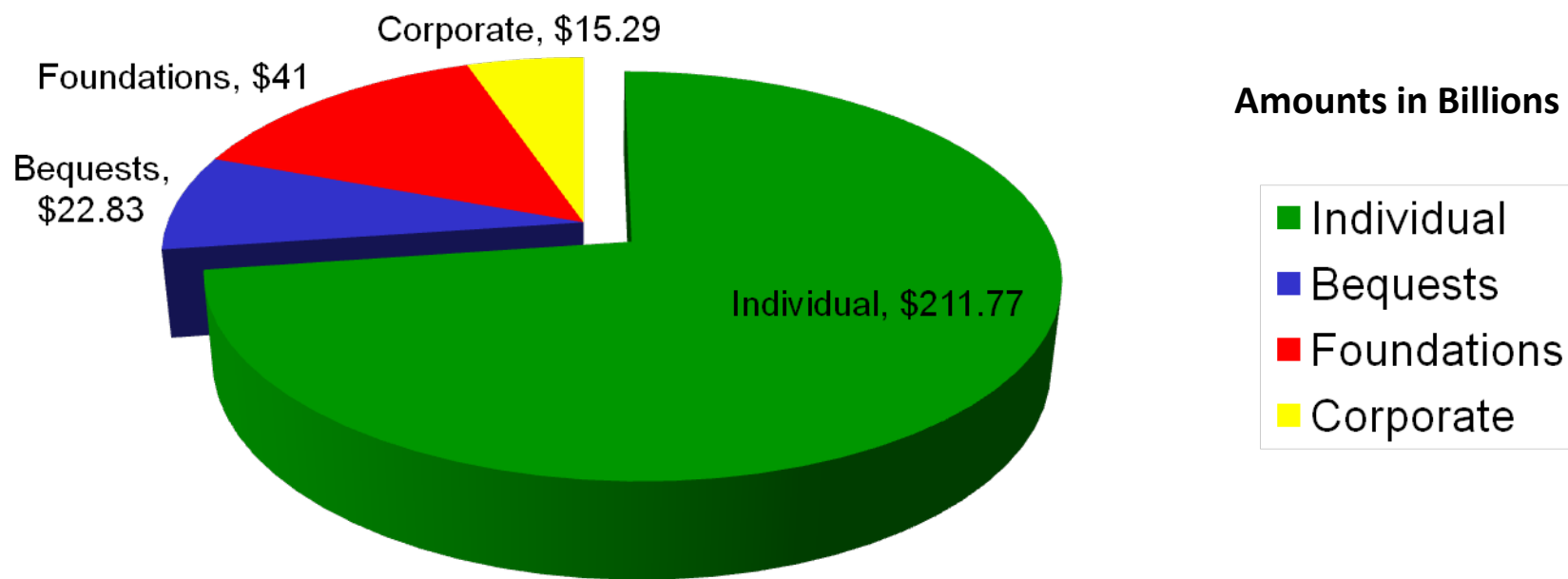
- Review current trends in nonprofits
- Understand who is giving and where the money is going
- Discuss the keys to nonprofit excellence
- Define your message and your audience
- Gain participation through volunteer leadership
- Define the development cycle
- Q&A

Nonprofit Data

- Total Number of Nonprofits in the US
 - 1.5 million in US; 7,303 in Mecklenburg County; 472 in the Lake Norman area (according to Guidestar)
- Contributions by Individuals, Corporations, and Foundations
 - \$290.89 Billion in 2010 (3.8% growth from 2009)
 - \$211.77 Billion from Individual Donors
- Average Annual Household Giving (2009)
 - \$1,940

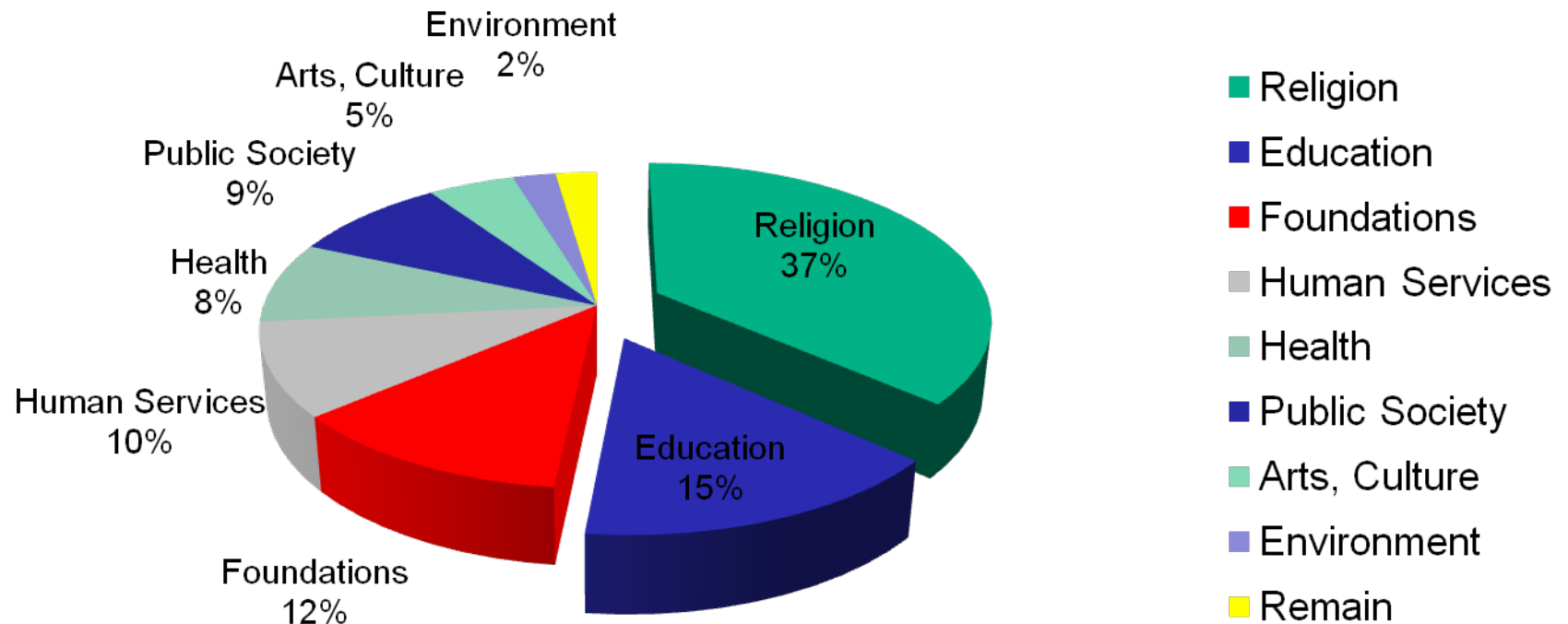
*2010 Statistics from The National Center for Charitable Statistics

Charitable Giving Statistics



Source: Giving USA 2010, Giving USA Foundation, 2010 (Center for Philanthropy at Indiana University)

Types of Recipients



Source: Giving USA 2010, Giving USA Foundation, 2010 (Center for Philanthropy at Indiana University)

Generational Giving Trends

- Matures (Born 1945 or Earlier)
 - 30.8 Million Donors; 79% Give; \$32.7 Billion/Year
- Boomers (Born 1945-1964)
 - 52.2 Million Donors; 67% Give; \$47.1 Billion/Year
- Gen X (Born 1965-1980)
 - 35.9 Million Donors; 58% Give; \$35.9 Billion/Year
- Gen Y (Born 1981-1991)
 - 28.5 Million Donors; 56% Give; \$9.78 Billion/Year

* 2010 Statistics from Convio

Seven Keys to Nonprofit Excellence

- 1. Define Mission, Vision and Goals**
2. Adapt Your Structure
- 3. Engage Your Board**
4. Seek Your Alliances
5. Develop Your Talent
- 6. Attack The Cycle**
7. Evaluate Effectiveness

Mission, Vision, and Goals

- Articulate your organization's purpose and future.
- Set realistic, achievable and measurable goals

What are we committed to do? What will success look like?

What will we accomplish this year?

Can you articulate the above clearly and comfortably?

Mission, Vision, and Goals: Action Items

- Organization: Mission, vision, next year
- Individual: Written vision statement
 - 10-year horizon
 - Professional
 - Personal
 - Educational
 - Financial

Activity

Develop a Messaging Plan

- Audience
- Message
- Method

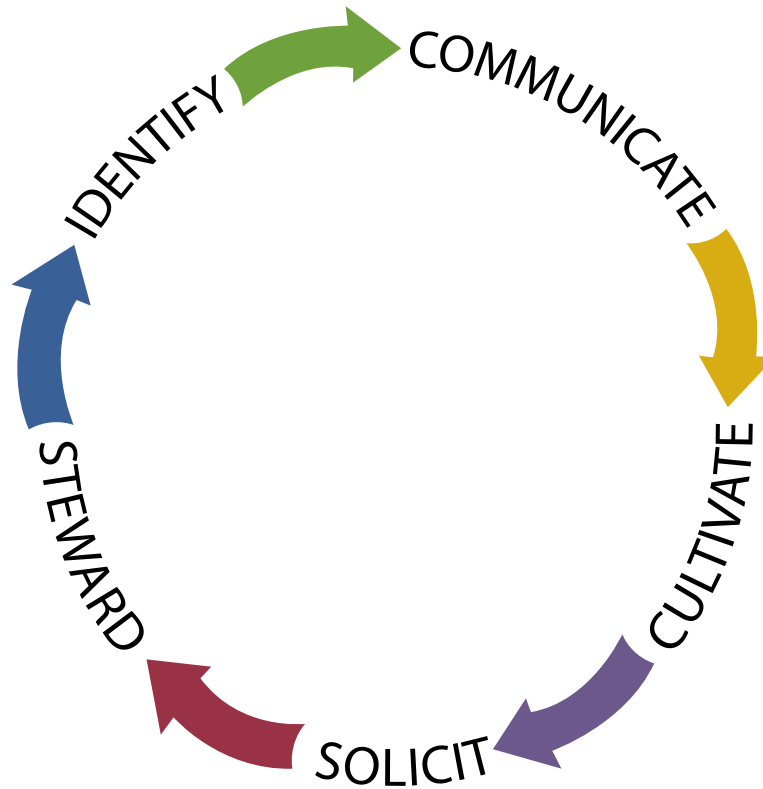
Maximize Board Effectiveness

- Analyze organization structure.
- Recruit and orient effectively.
- Three Keys to a High Performing Board:
 - 1. Spreadsheet of current board demographics
 - 2. Ideal profiles based on assessment
 - 3. Wish list of target board members

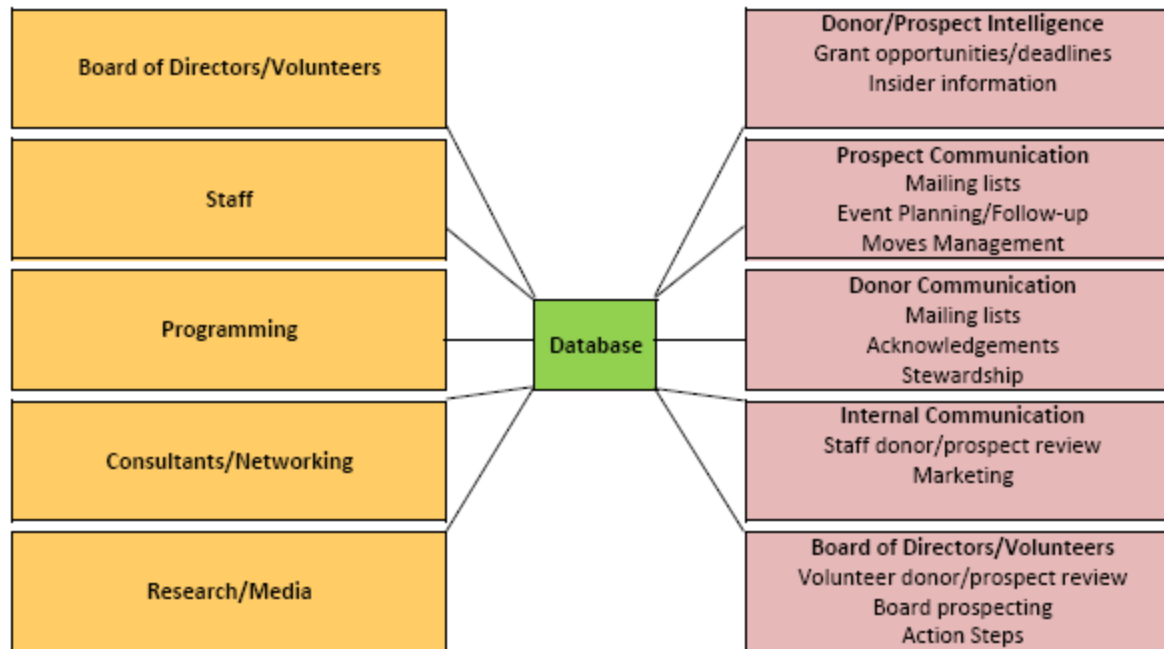
Attack the Development Cycle

- Identify targets.
- Communicate message.
- Cultivate donors.
- Solicit participation.
- Be a good steward.

Development Cycle



Data Flow



Development Cycle

- **Identification**
 - Data acquisition
 - Data utilization
 - Prioritization

Development Cycle

- **Communication**
 - Who are your exact stakeholders?
 - What is your message to your stakeholders?
 - How do you deliver the message?

Development Cycle

- **Cultivation**

- How do you bring your donors closer?
- Do your donors feel your mission?
- How do you nurture these relationships?

Development Cycle

- **Solicitation**

- How do you determine who makes the ask?
- When is the ask made?
- What is the process for determining the level of the ask?

Development Cycle

- **Stewardship**

- Are you taking care of your donors?
- Do you have a stewardship plan?
- What is your process for thanking your donors?

Final Thoughts

Questions & Answers

Please visit our website:
www.pattonmcdowell.com