Amplify Fund Development

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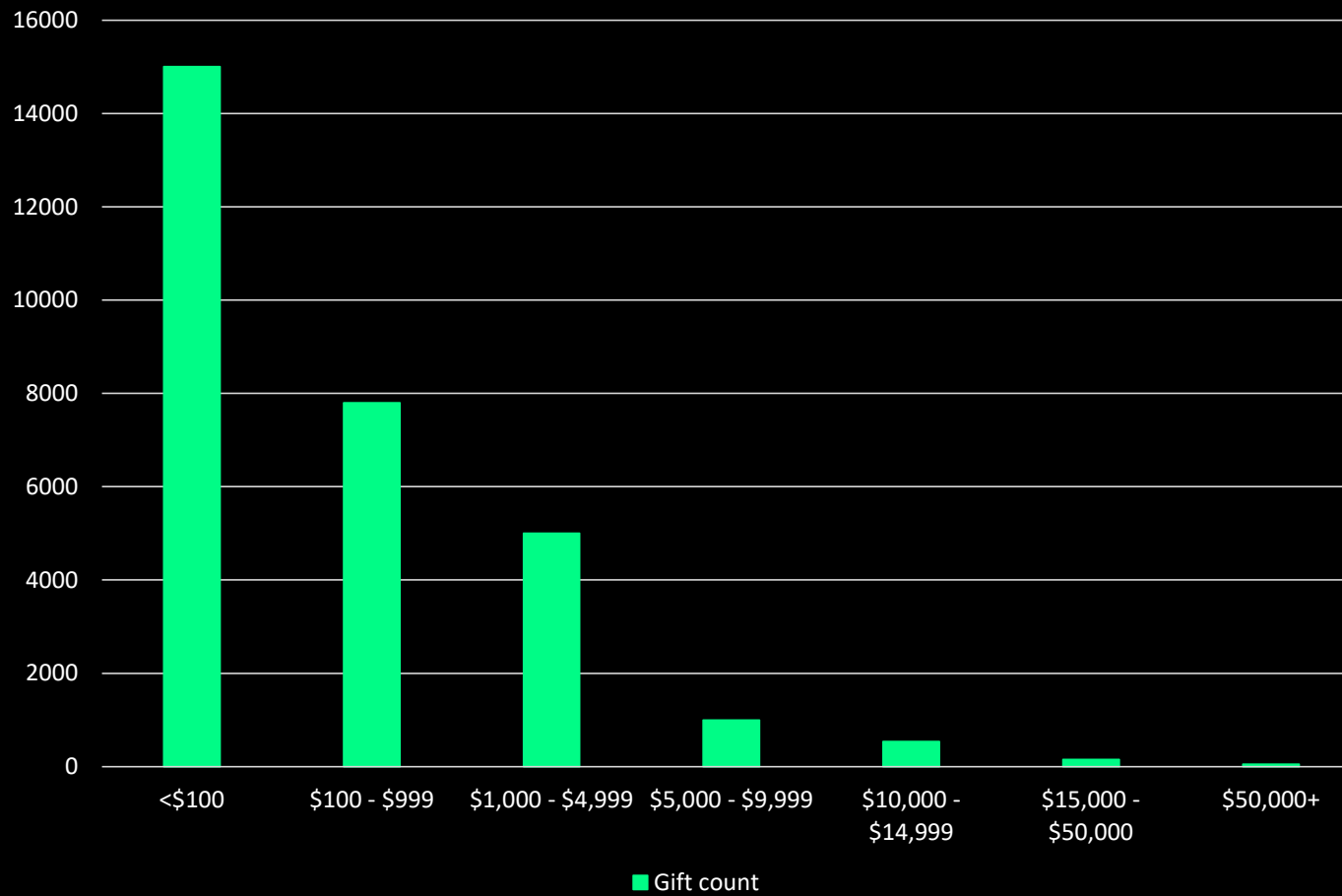
Big Brothers Big Sisters®

A BOLD PATH TO A
BIGFUTURE

NATIONAL CONFERENCE • JUNE 26-29 2023

Goals

1. Understand the benefits of leveraging Matchforce for Fund Development

2. Understand approaches to building your budget

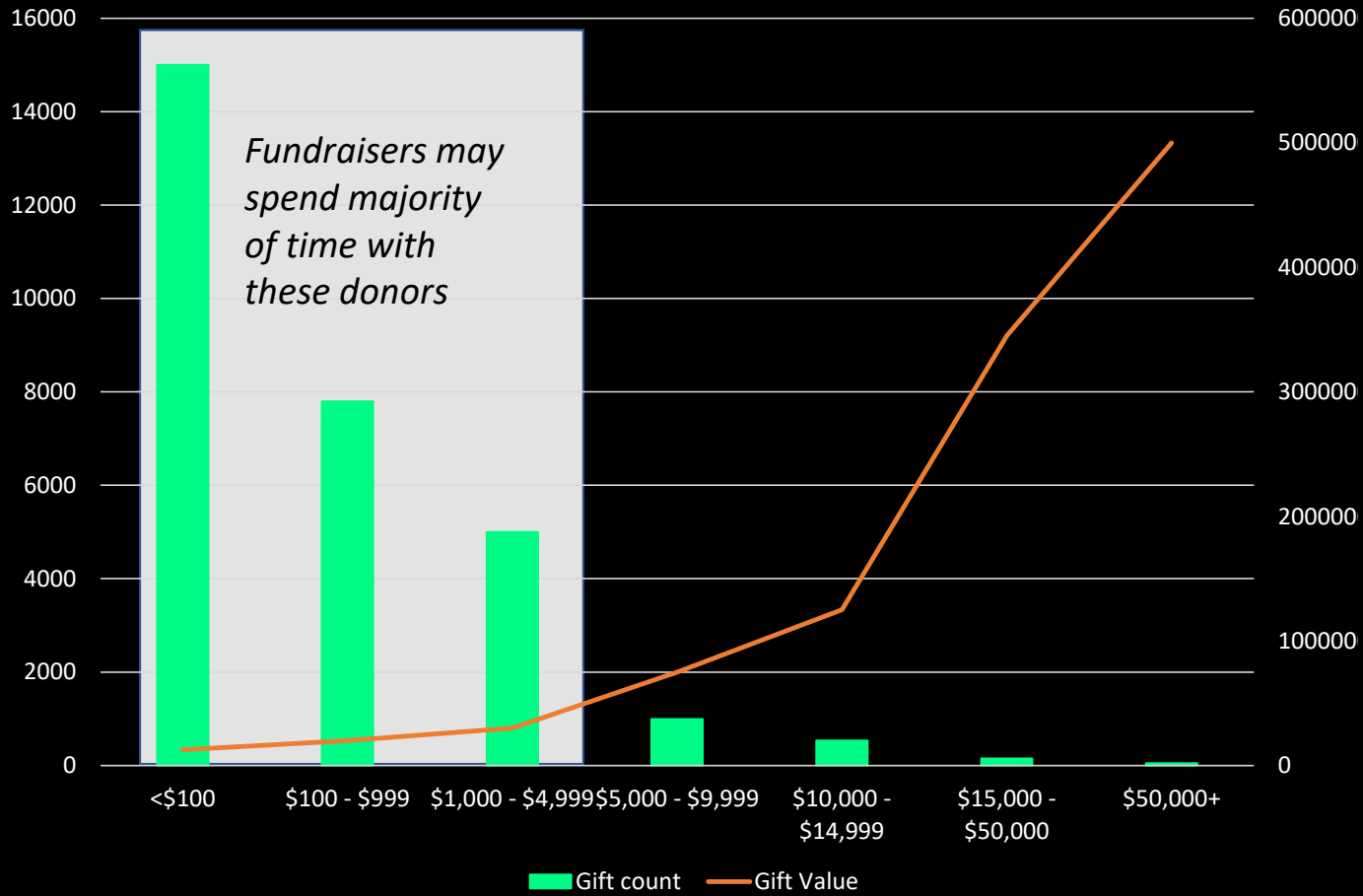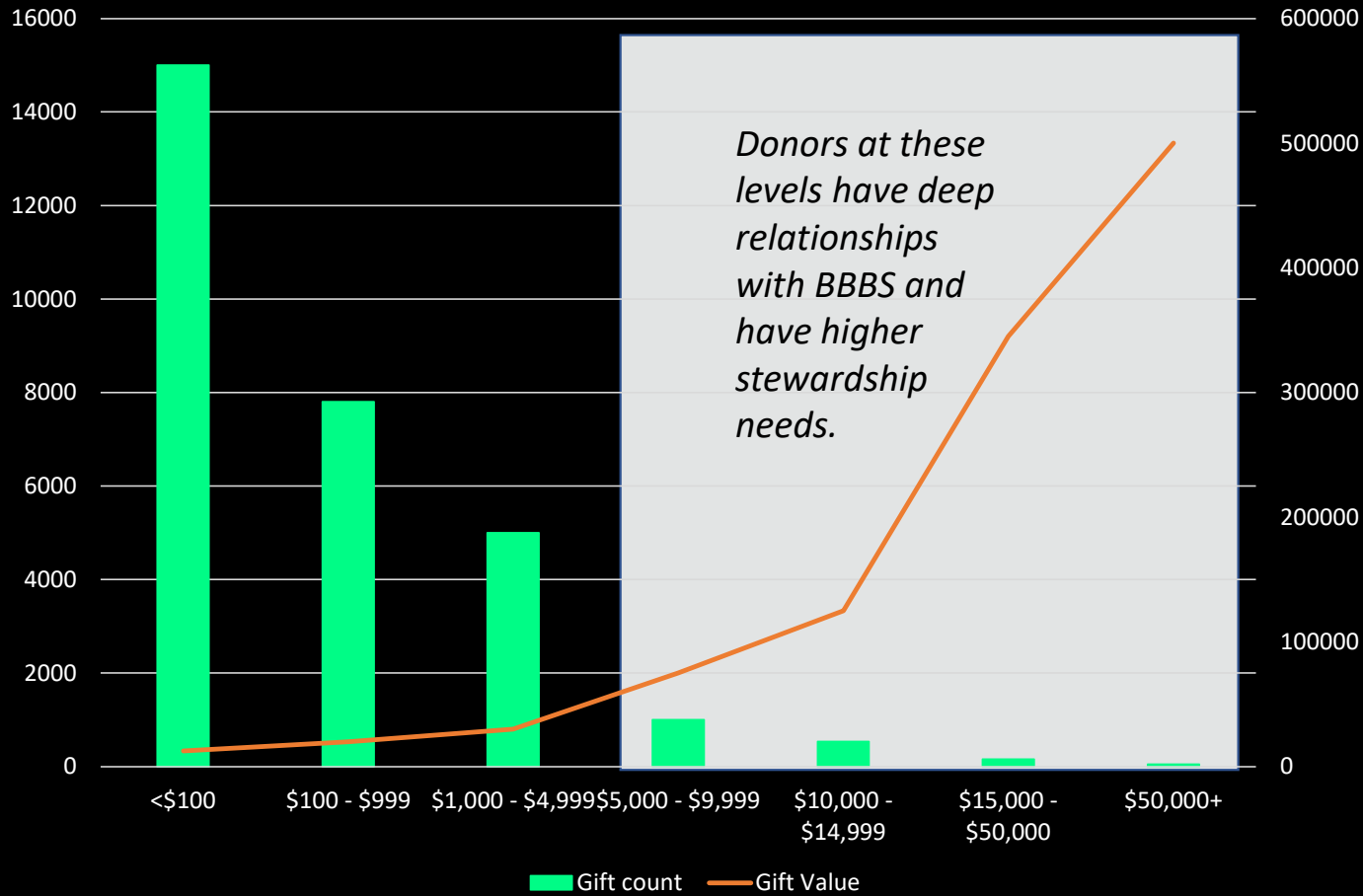3. Be able to develop and cultivate your fundraising funnel

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Fund Development Structure

	16000						600000

Fundraisers may spend majority of time with these donors

Gift count ▬   Gift Value ▬

x-axis: <$100, $100 - $999, $1,000 - $4,999, $5,000 - $9,999, $10,000 - $14,999, $15,000 - $50,000, $50,000+

left axis: 0, 2000, 4000, 6000, 8000, 10000, 12000, 14000, 16000

right axis: 0, 100000, 200000, 300000, 400000, 500000, 600000

Fund Development Structure

Donors at these levels have deep relationships with BBBS and have higher stewardship needs.

Chart axis labels (left, Gift count): 16000, 14000, 12000, 10000, 8000, 6000, 4000, 2000, 0

Chart axis labels (right, Gift Value): 600000, 500000, 400000, 300000, 200000, 100000, 0

Category labels: <$100, $100 - $999, $1,000 - $4,999, $5,000 - $9,999, $10,000 - $14,999, $15,000 - $50,000, $50,000+

Legend: Gift count, Gift Value

Fund Development Structure

Campaigns

What are they?

Campaigns are coordinated fundraising and engagement efforts, such as:
- Direct mail appeals
- E-news messages
- Sybunt/Lybunt solicitation
- Peer-to-Peer fundraising
- Galas/Graduations

Why?

Campaigns are a great tool to manage engagement & solicitation activities for non-major gift donors, and to see the ROI for those activities

Benefits

- Communicate with low & mid-level donors in a consistent, frequent, and targeted way that resonates with them
- Track ROI and engagement using Matchforce

Opportunities

Opportunities allow for tracking of donations across their lifecycle.

1 Different Opportunity Record types enable users to track potential donations differently

2 Opportunities can be related to any of the following

People/Organizations

Users can relate an Opportunity to a combination of Households, People, and/or Accounts

Campaigns

Directly assign the Opportunity amount to your fundraising campaign
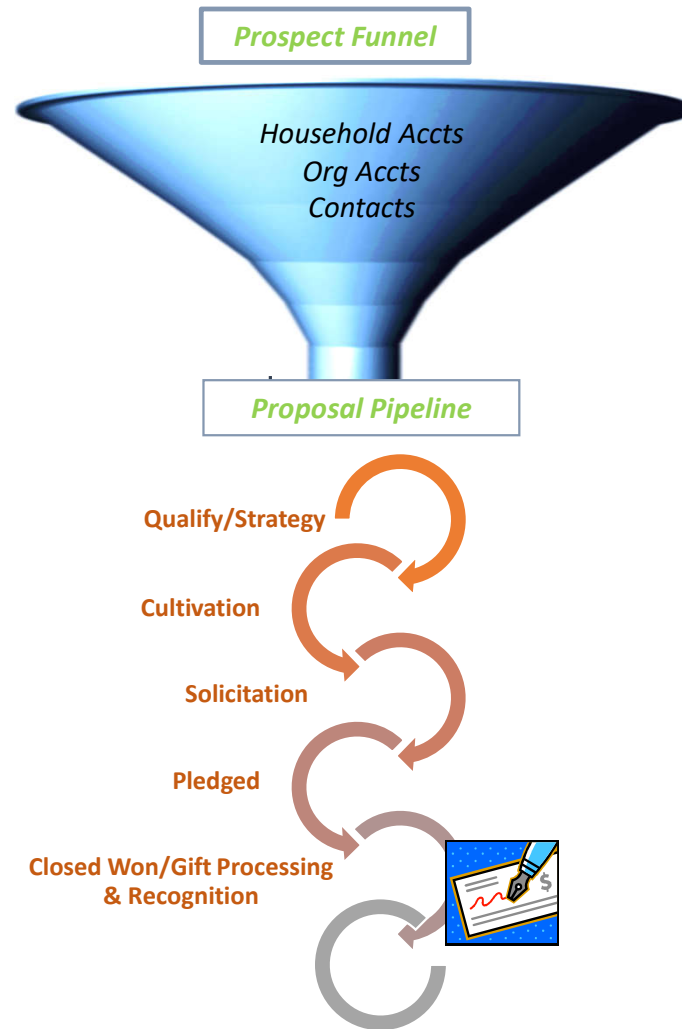
General Accounting Units

Designate funds for a specific use or meet restrictions set by a donor, governing agency, etc.

Influencers

Assign soft credits to represent recognition of credit for donations.

The Relationship Management Cycle

Prospect Funnel

Household Accts
Org Accts
Contacts

Proposal Pipeline

Qualify/Strategy

Cultivation

Solicitation

Pledged

Closed Won/Gift Processing & Recognition

Leveraging Matchforce Opportunities

Build a budget

01

Enter all known prospects and recurring donors as opportunities, create campaigns for planned activities

02

Refine and calendar opportunities (by quarter, 20/20/20/40%), enter 'worst case' to start working with risk

03

Refine with context of big picture – what is needed to meet or exceed expenses? Do you have fundraiser goals?

Leveraging Matchforce Opportunities

Pipeline Meetings

01

Opportunity Status

- Number/value of "won", "lost", and "open" this month/quarter/year.
- Are reports due?

02

What's being cultivated

Deep-dive into "open" Opportunities. What is the last step/next step?

03

Pipeline/Campaign Health

What Opportunities have been qualified? What is the health of our prospect list? How are campaigns performing?

Quick Demo

Questions?

salesforceupdates.bbbs.org