

# Jeffrey Byrne + Associates, Inc.

**National fundraising and financial development firm** headquartered in Kansas City, Missouri

***\$1,250,000,000 raised for 320 nonprofit organizations***

**Mission:** *Committed to nonprofit fundraising success.*

**Values:** Service, Passion, Integrity, Leadership

**Services:**

- + Consulting Services
- + Advancement Planning
- + Analytics
- + Communications, Publications + Marketing

**Member of The Giving Institute**



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# The Giving Institute

## Developing extraordinary leaders in the world of philanthropy

- Currently 49 member organizations
- Sister organization of the Giving USA Foundation™ -- *Giving USA*, the annual report on American philanthropy
- Established in 1935 as the American Association of Fund-Raising Counsel
- Championed development of widely accepted standards of professional conduct
- Helped fund the startup of the United Way
- Member firms helped charitable organizations raise billions of dollars



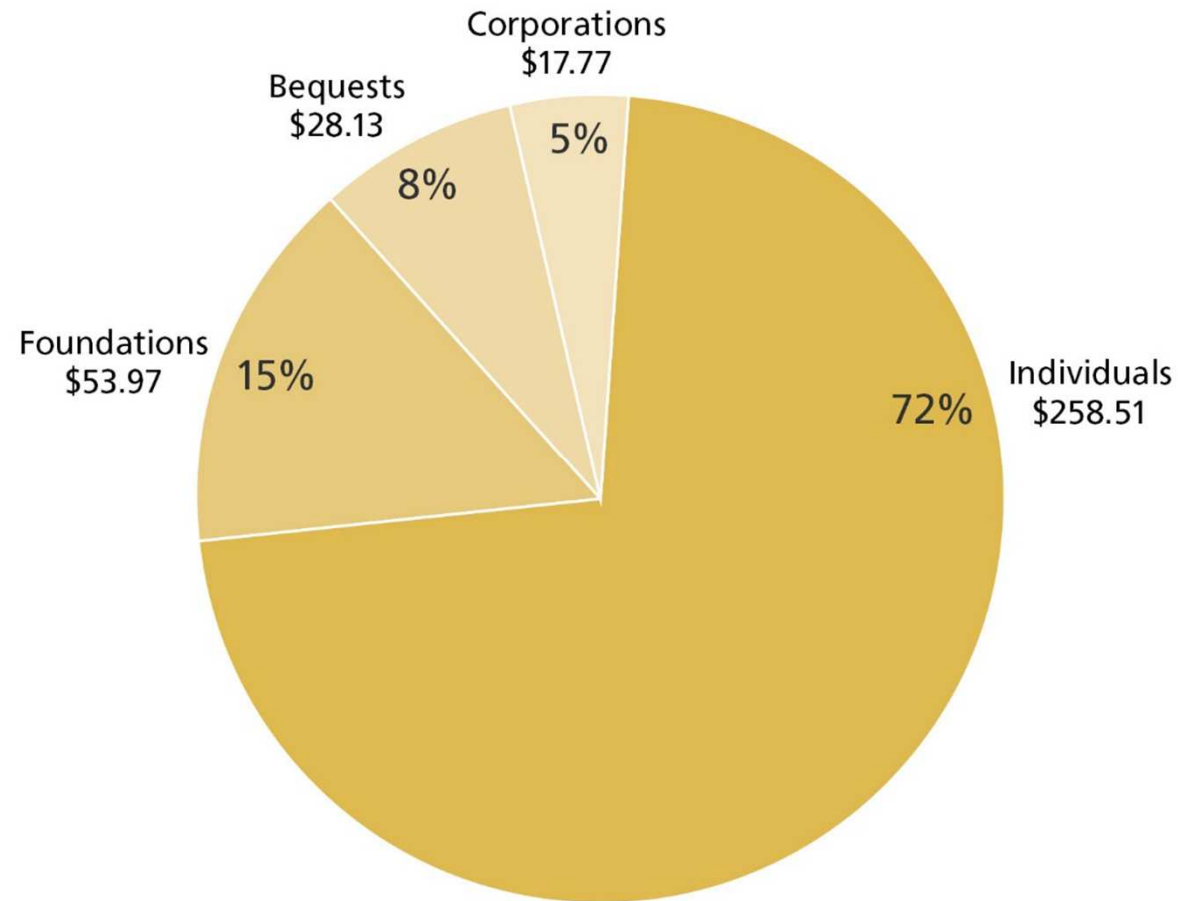
THE  
Giving  
Institute™  
Shared intelligence.  
For the greater good.



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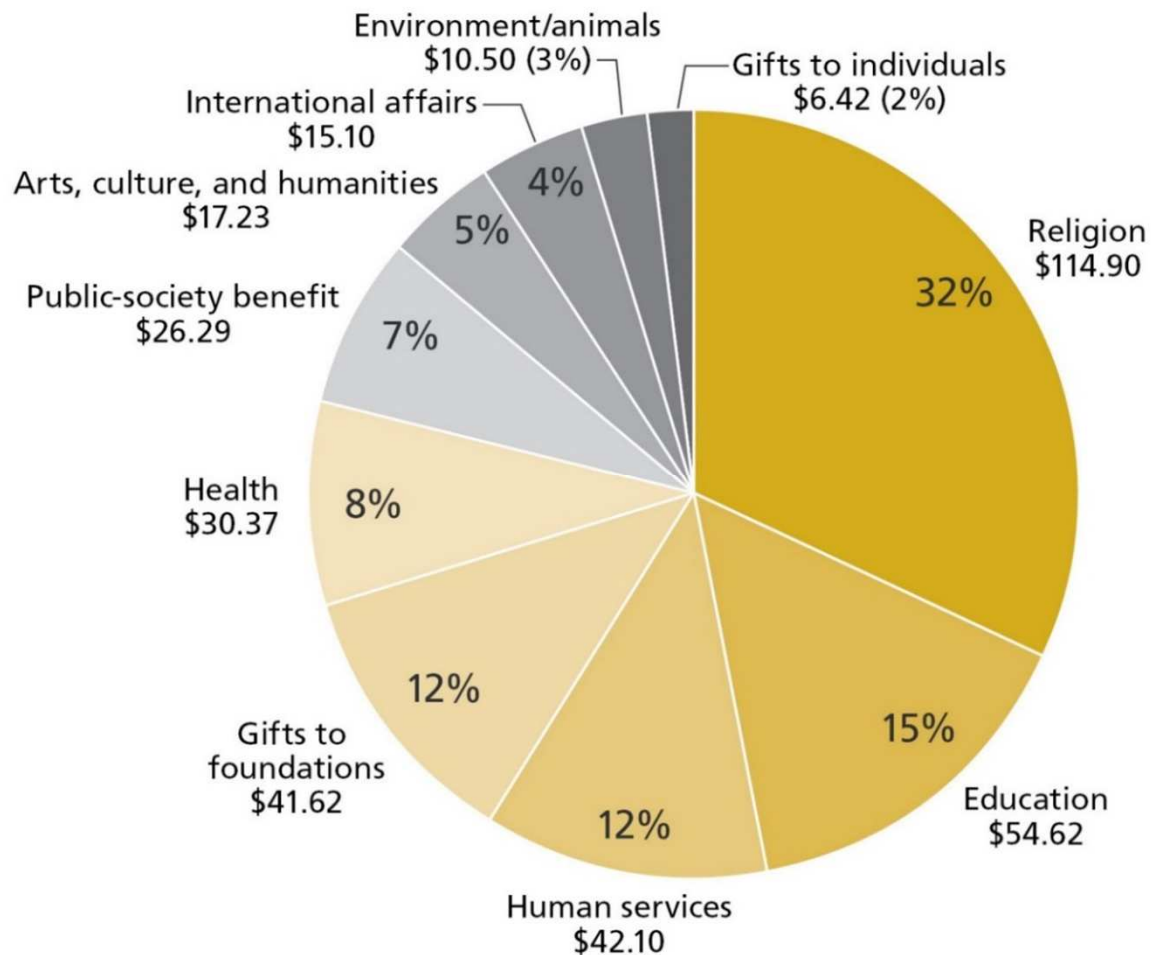


# 2014 contributions: \$358.38 billion by source (in billions of dollars – all figures are rounded)



SOURCE: Giving USA Foundation | *GIVING USA 2015*

# 2014 contributions: \$358.38 billion by recipient (in billions of dollars – all figures are rounded)



SOURCE: Giving USA Foundation | *GIVING USA 2015*

# JB+A Criteria for Success<sup>SM</sup>

- A Case for Support that is Realistic, Relevant and Compelling
- Assessment to Gauge Readiness (Internally and Externally)
- Commitment from Leadership (Organizational and Community)
- Prospective Donor Development
- Implementation of Strategy
- Stewardship

# JB+A Criteria for Success<sup>SM</sup>

A Case for Support that is  
Realistic, Relevant and Compelling

*A meaningful story that will attract stakeholders*



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# JB+A Criteria for Success<sup>SM</sup>

## Assessment to Gauge Readiness Internally and Externally

*Identification of the resources your organization  
needs to undertake the fundraising effort*

*and*

*project goals aligned with prospective donors*



# JB+A Criteria for Success<sup>SM</sup>

Commitment from Leadership  
Organizational and Community

*Time, talent and treasure for the  
benefit of the project, your organization and  
those you serve*



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## Prospective Donor Development

*An appraised and prioritized prospective funding base sufficient to support your goal*



## Implementation of Strategy

*Fundraising progress within a detailed timeline of activities and accountabilities*



## Stewardship

*Increased commitment to your organization*



# Developing Relationships

- **Organizations need many different types of people to support its mission in many different ways**
  - Identifying prospective donors and volunteer leadership
  - Establishing personal connections
  - Creating strategies for cultivation
  - Solicitation -- opening doors or requesting gifts
  - Facilitating stewardship
  - Making personal gifts / serving as leadership



# DonorSearch: *DonorPerfect Philanthropic & Wealth Screening Partner*

**National prospect research firm** headquartered outside of Baltimore, MD

***Over 1,600 current clients, and 200 current DonorPerfect Clients***

- + Founded in 2007
- + Offer online application and batch processing
- + Only company to integrate with DonorPerfect
- + Only company to identify known philanthropy
- + Only company to manually verify electronic screening results



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# DonorSearch: *We Start With Proven Philanthropy*

## **Six Markers of Philanthropy**

Based on a study of:

- \$5 billion in giving
- 2 million individuals
- 400 organizations

1. Giving to your organization
2. Giving to other organizations
3. Foundation trustee
4. Political giving
5. Value of real estate
6. Business affiliations



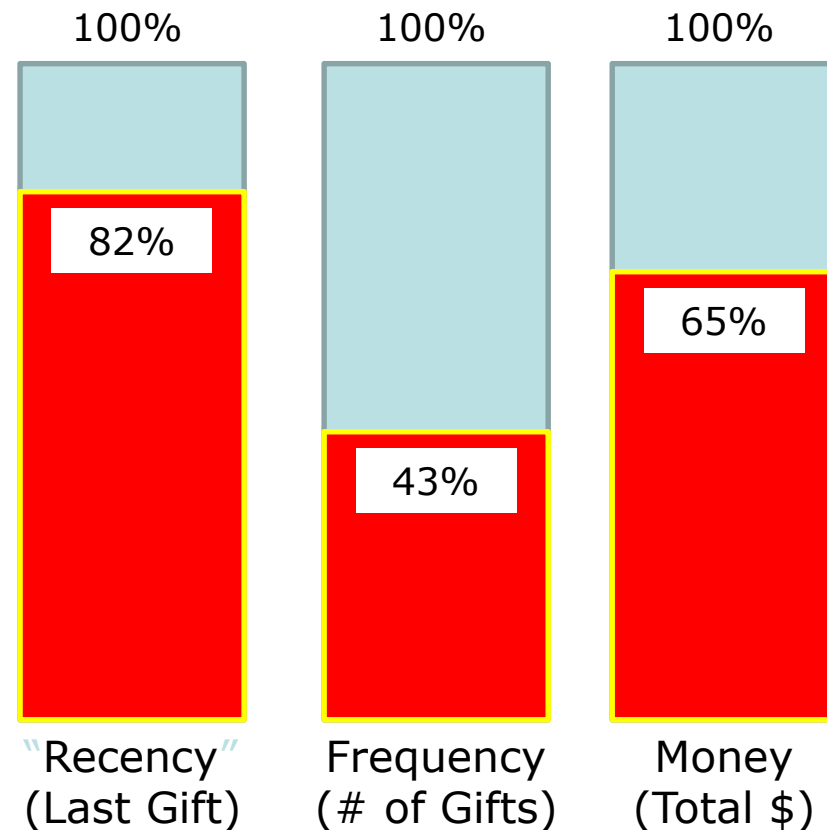
# DonorSearch: We Start With Proven Philanthropy

## Data Marker 1

*Previous giving to your organization*

$R+F+M = \text{RFM}$  or  $82+43+65=190$

- Common measure of loyalty
- Easy to calculate
- Can be weighted to suit your organization



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# DonorSearch: We Start With Proven Philanthropy

## Data Marker 2

*Previous giving to other organizations*

	<b>% of Donors</b>	<b>% of \$\$\$</b>	<b>Predictive Strength</b>
Benchmark	100.0%	100.0%	1.00
Where \$100k is largest gift elsewhere	0.7%	24.1%	32.67
Where \$50k-\$100k is largest	0.5%	13.5%	25.02
Where \$25k-\$50k is largest	0.6%	6.5%	11.79
Where \$10k-\$25k is largest	0.7%	7.0%	10.73
Where \$5k-\$10k is largest	1.1%	5.4%	4.98



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# DonorSearch: We Start With Proven Philanthropy

## Data Marker 3

*Position as foundation trustee/board member*

- Information is easy to find
- Understand importance of philanthropy



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## Data Marker 4

### *Political giving*

- Single gift of \$250 puts your donor in the top 6% of the US population
- Single gift of \$1,000 puts your donor in the top 1/10th of 1%
- Virtually every FEC donor with lifetime political giving of \$15,000 has made a 4,5,6, or 7 figure charitable gift somewhere

Back Testing Database	% of Donors	% of \$\$\$	Predictive Strength
All Giving above \$2,500	3.8%	54.6%	14.48
All Giving above \$1,000	11.0%	70.7%	6.43
All Giving above \$500	14.4%	74.3%	5.17



# DonorSearch: We Start With Proven Philanthropy

## Data Marker 5 *Value of real estate*

- Publicly available wealth marker
- Information is likely to be current

Real Estate	% of Donors	% of \$	Predictive Strength
\$2+ million	1.4%	25.0%	17.55
\$1-2 million	3.2%	13.2%	4.17
\$750k-\$1 million	2.5%	5.7%	2.25
\$500k-\$750k	5.4%	6.8%	1.25
\$250k-\$500k	12.8%	8.6%	0.67
\$125k-\$250k	10.9%	4.8%	0.44
<\$125k	8.4%	3.5%	0.42



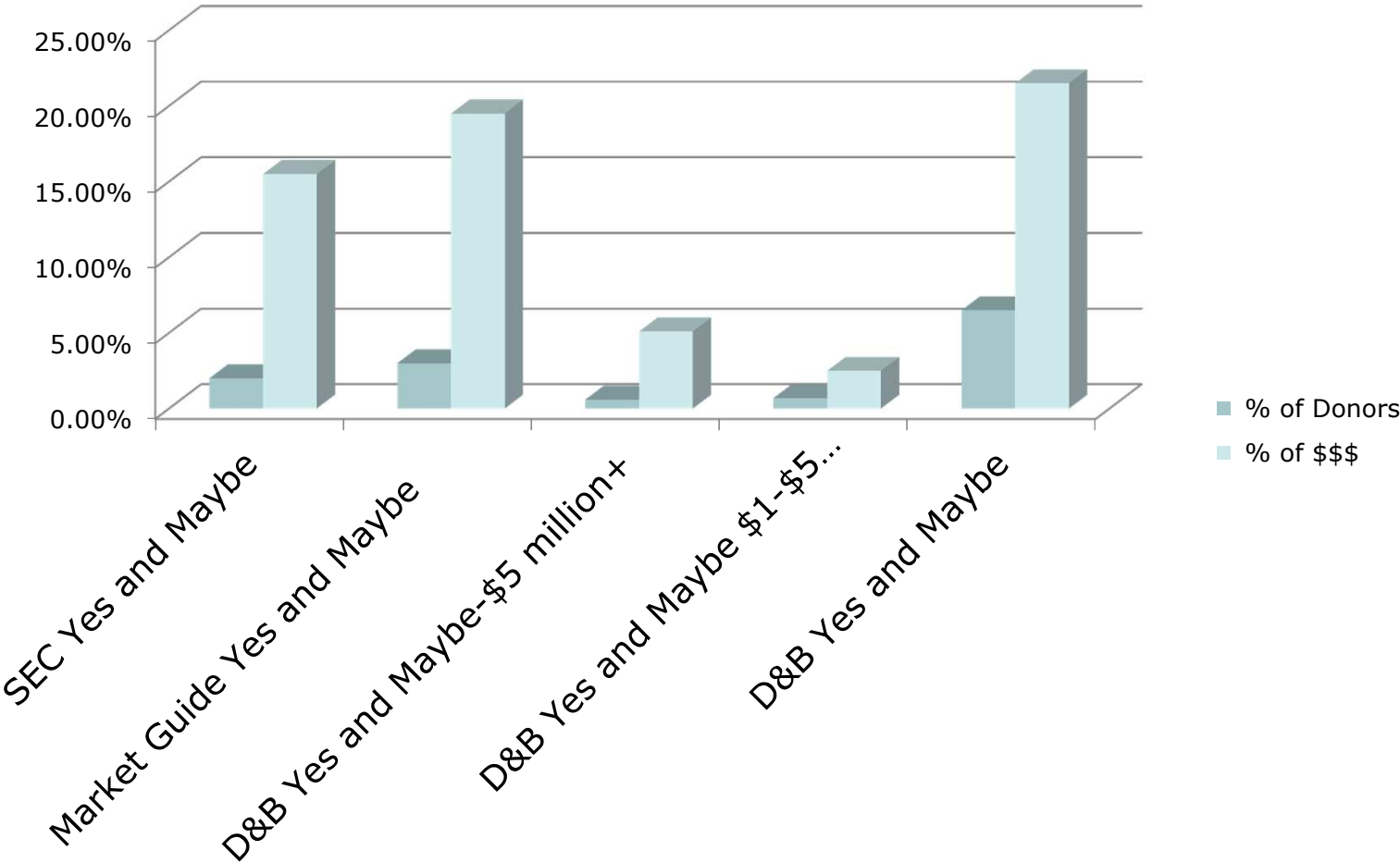
# DonorSearch: We Start With Proven Philanthropy

## Data Marker 6 *Business affiliations*

Back Testing Database	% of Donors	% of \$	Predictive Strength
SEC Yes and Maybe	2.0%	15.5%	7.76
Market Guide Yes and Maybe	3.0%	19.5%	6.56
D&B Yes and Maybe \$5+ million	0.6%	5.1%	9.04
D&B Yes and Maybe \$1-5 million	0.7%	2.5%	3.53
D&B Yes and Maybe	6.5%	21.5%	3.32



# DonorSearch: We Start With Proven Philanthropy



# JB+A Criteria for Success<sup>SM</sup>

## Commitment from Leadership

- Board
- Staff
- Volunteer leadership
  
- Inner Family sets the tone and example
  
- Report Inner Family success

# JB+A Criteria for Success<sup>SM</sup>

## Prospective Donor Development

- Quantitative and qualitative analysis
  - Research/screenings
  - Prospect Review Committee
- Appraise
- Prioritize
- Clear strategies for each prospect
- Assign soliciting team

# Best Practices - Major Gifts

- Internal and external leadership is critical
- Staff, volunteers and donors work together
- Knowledge is the foundation of good decision-making
- Relationship Building is long-term
- Identify and segment potential donors (A-list, B-list...)





# Contact Us



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