

The Art and the Science of Fundraising

筹款的艺术与科学

2018 CAFPA Annual Forum, Shanghai
2018公益筹款人大会，上海

Astrid v. Soosten, CFRE, German Fundraising Association (DFRV)
Astrid v. Soosten,注册筹款人，德国筹资协会

About me

关于我

Head of Resource Development
at European Molecular Biology
Laboratory until 12/31/2018

2018年12月31日前，担任欧洲
分子生物学实验室资源拓展负
责人

01/01/ 2019 Partner at Brakeley
Fundraising Consulting,
Germany

2019年1月1日起，成为德国
Brakeley筹款咨询的合伙人

◆ Active in educational fundraising since 1995

1995年起活跃于教育领域筹款

◆ Work experience in the US and in Europe

拥有美国及欧洲的工作经验

◆ Specialized in major gift fundraising

大额捐赠筹款专家

◆ CFRE since 2007

2007年起成为注册筹款人

◆ Aikido Third degree black belt

合气道三等黑带

◆ Degree in Chinese Studies

获得中文专业学位

◆ Studied at Fudan University 1983-1985

1983-1985在复旦大学学习

Today's talk

今日将分享.....

- ◆ Basics 基础知识
- ◆ A Good Case for Support 一个很好的支持理由
- ◆ The Classical Donor Cycle 经典的捐赠人周期
- ◆ Fundraising Segments & Products 筹款细分和产品
- ◆ Ethics in Fundraising 筹款伦理

Basics

基础知识



Mission & Vision

使命 & 愿景

- ◆ Your best tool to stay on track

是你步入正轨的最佳工具

- ◆ Your best tool to keep your donors on track

是你维护捐赠人的最佳工具

- ◆ Your best tool to keep your leadership on track

是你保持、发挥领导力的最佳工具

OUR VISION, MISSION AND VALUES

Our vision

A world in which every child attains the right to survival, protection, development and participation.

Our mission

To inspire breakthroughs in the way the world treats children and to achieve immediate and lasting change in their lives.

Our values

Accountability

We take personal responsibility for using our resources efficiently, achieving measurable results, and being accountable to supporters, partners and, most of all, children.

Ambition

We are demanding of ourselves and our colleagues, set high goals and are committed to improving the quality of everything we do for children.

Collaboration

We respect and value each other, thrive on our diversity, and work with partners to leverage our global strength in making a difference for children.

Creativity

We are open to new ideas, embrace change, and take disciplined risks to develop sustainable solutions for and with children.

Integrity

We aspire to live to the highest standards of personal honesty and behaviour; we never compromise our reputation and always act in the best interests of children.

救助儿童会

使命愿景价值观

愿景

一个所有儿童都能享有生存、保护、发展及参与权利的世界。

使命

推动全社会在对待儿童方面取得突破性的进步，为儿童的生活带来及时和持久的改变。

价值观

负责—我们每个人都有责任善用资源，并用得其所，对我们的支持者及合作伙伴负责；特别是对儿童负责。
抱负—我们要求我们的员工制定远大的目标，并致力于改进我们为儿童所做的一切。
合作—我们尊重彼此的价值，鼓励多元化，与合作伙伴携手合作，共同凝聚全社会的力量改变儿童的生活。
创新—我们接纳和鼓励创新的理念，与儿童一起探索可持续的解决方案。
诚信—我们坚守最高标准的诚信和自律，坚决捍卫我们的声誉，永远以儿童的最大利益为本。

Strategic Plan

战略计划

- ◆ Your best tool to stay on track

是你步入正轨的最佳工具

- ◆ Your best tool to keep your donors on track

是你维护捐赠人的最佳工具

- ◆ Your best tool to keep your leadership on track

是你保持、发挥领导力的最佳工具

We Believe that World Change Starts with Educated Children.®

We envision a world in which all children can pursue a quality education that enables them to reach their full potential and contribute to their communities and the world.

Room to Read seeks to transform the lives of millions of children in low-income communities by focusing on literacy and gender equality in education. Working in collaboration with local communities, partner organizations and governments, we develop literacy skills and a habit of reading among primary school children, and support girls to complete secondary school with the relevant life skills to succeed in school and beyond.

[Download our Strategic Plan](#)

Invest in a Child's Education

Room to Read invests in the future of nearly one million children each year. Help us reach more children more quickly.

[Donate Now](#)

我们相信改变世界始于受教育的孩子。

想象这样一个世界：所有的孩子能够追求有质量的教育，帮助他们探索自己的潜力，并对他们所在社区和世界做出贡献。

Room to Read通过聚焦文化和性别平等教育，改变数以百万计的低收入家庭孩子的生活。通过跟当地社区、伙伴组织和政府的合作，开发小学生的听说读写能力及阅读习惯，支持女生完成中学教育，帮助其获得相应的生活技能支持学业和今后生活。

The Art and Science of Fundraising, Astrid v. Soosten, CFRE, 2018 CAPF Annual Forum, Shanghai

Institutional Support/Readiness

机构支持/准备

- ◆ Clear and transparent financial processes

清晰透明的财务流程

- ◆ Fundraising guidelines

筹款指南

- ◆ Leadership takes fundraising seriously

领导层重视筹款

A Good Case for Support

一个很好的支持理由



What is a good case for support?

什么是一个很好的支持理由

- ◆ What is the problem we are solving? 我们在解决什么问题?
- ◆ Why does it matter? (Why does it matter to the donor?) 为什么它很重要（为什么它对捐赠人重要？）
- ◆ How are we solving it? 我们正在如何解决问题？
- ◆ Why does it change the world? What is its impact? 为什么它可以改变世界？它的影响力是什么？
- ◆ Why us? 为什么是我们？
- ◆ How can a donor help? 捐赠人可以如何支持？

663 million people in the world live without clean water.¹

That's nearly 1 in 10 people worldwide. Or, twice the population of the United States. The majority live in isolated rural areas and spend hours every day walking to collect water for their family. Not only does walking for water keep children out of school or take up time that parents could be using to earn money, but the water often carries diseases that can make everyone sick.

But access to clean water means education, income and health - especially for women and kids.



世界上有663,000,000人生活中缺乏干净的水
这相当于将近十分之一的世界人口，或者说美国人口的两倍。大多数人生活在偏远的农村地区，每天需要步行好几个小时去为自己的家庭取水。步行取水不仅会占据了孩子们上学的时间，或者占据了大人本可以用于赚钱的时间，而且这些水常常携带病菌，喝了使人生病。

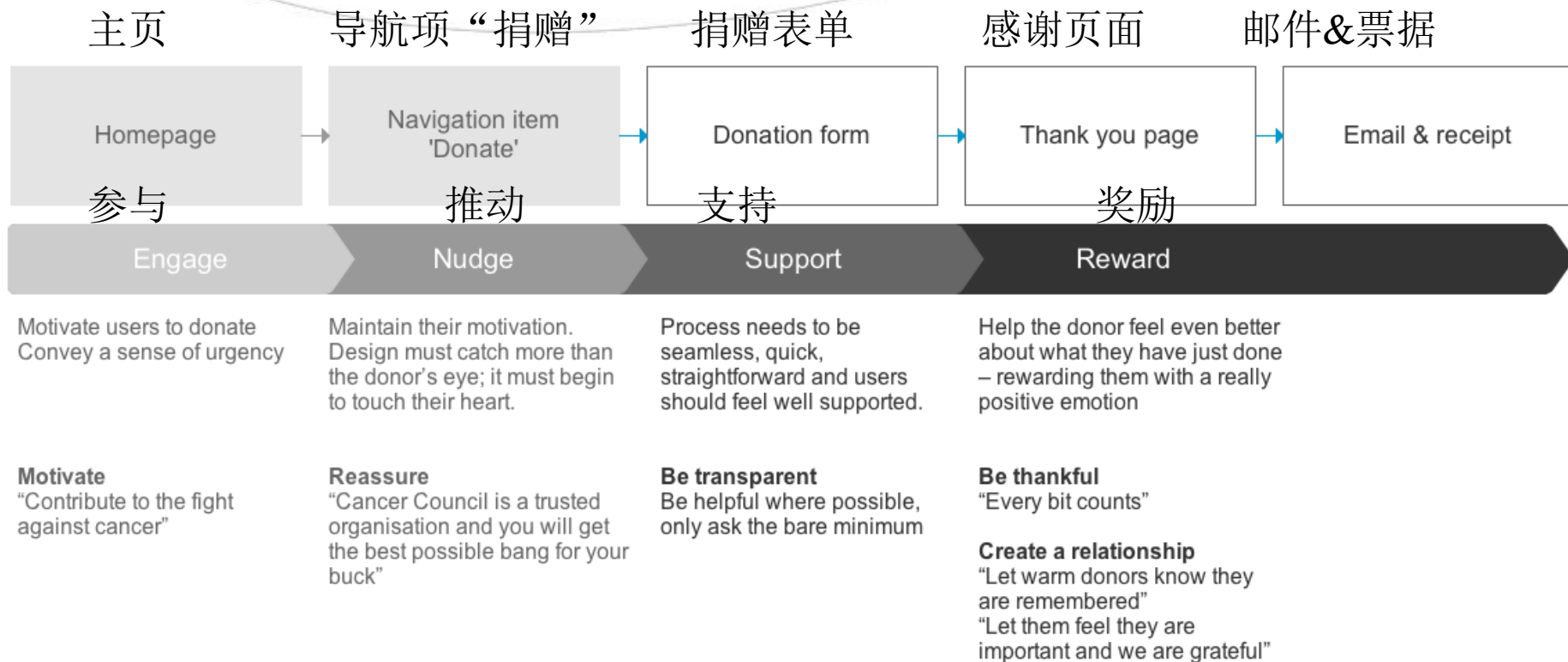
获得干净的水意味着教育，收入和健康-尤其是对妇女及儿童。

The Donor 捐赠人



The Donor Journey

捐赠人的旅程



Donor Centric Fundraising

以捐赠人为中心的筹款



The Donor Cycle

捐赠人周期



Finding your donors

寻找你的捐赠人

How you identify your donors depends on the segment you are fundraising for.

如何识别捐赠人取决于你要为之筹款的细分领域。

- ◆ Your own mailing lists 拥有邮件发送清单
 - ◆ Wealth screening 财富筛选
 - ◆ ZIP Code by wealth 邮编定位财富
 - ◆ Location 地理位置
 - ◆ Interests 兴趣爱好
 - ◆ Education 教育程度
- ◆ Addresses for purchase 购买地址
 - ◆ Of people who are interested in something related to your cause 对你事业感兴趣的人
 - ◆ People of wealth in your region (ZIP Code by wealth) 你所在区域的富人
 - ◆ Lists of other interesting groups, e.g. Luxury Retailers 其他有意思的群体清单，比如奢侈品零售店
- ◆ Be creative 富有创造力



Finding your donors

寻找你的捐赠人

How you identify your donors depends on the segment you are fundraising for.

如何识别捐赠人取决于你要为之筹款的细分领域。

- ◆ Major donor prospects 大额捐赠方预期
 - ◆ Location 场所
 - ◆ History of Philanthropy 慈善史
 - ◆ Your own database 你自己的数据库
 - ◆ Service Clubs 服务俱乐部
 - ◆ Business Associations 商业协会
 - ◆ CEO Clubs 总裁俱乐部
 - ◆ Employer Associations 雇主协会
 - ◆ Think creatively 创造性思维



Finding your donors

寻找你的捐赠人

When you do not have a clue who they might be

当你不知道他们是谁的时候

- ◆ Generate interest 产生兴趣
- ◆ Engage 参与
- ◆ Cultivate 培育
- ◆ Search advocates, multipliers, influencers 寻找倡导者，加速者，影响者
- ◆ Build a network of people interested in your cause 建立一个对你的事业感兴趣的联系网络
- ◆ Be creative, explore new avenues! 勇于创新，开拓新路!



Qualifying your donor

评估捐赠可能性

- ◆ Wealth screening, property records, social contacts, wealth rankings

财富筛选，财产记录，社会关系，财富排名

- ◆ Discovery visit 发现探访

- ◆ **Phase in financial life 财务生命阶段:**

- ◆ Donating from salary 来源于工资的捐赠
- ◆ donating from accrued assets 来源于应计资产的捐赠
- ◆ donating from inherited assets 来源于继承资产的捐赠

Cultivate your prospective donor(s) 培育你的潜 在捐赠人

- ◆ Learn as much about your prospect as possible
尽可能多地了解潜在捐赠人
- ◆ Tailor your approach 定制你的方法
 - ◆ Look at what you can reasonably and credibly offer to a prospect 看看你能给潜在捐赠人合理可信地提供什么
- ◆ Develop a cultivation plan 指定一个培育计划
 - ◆ For a group of prospects 为了一群潜在捐赠人
 - ◆ For individual prospects 为独立的捐赠人

??!!
A five
minute
affair
一件五
分钟的
事情

Soliciting a prospect 🙄 开口征询

- **Preparation, preparation, preparation!!** 做好准备，做好准备，做好准备！！
- Know WHY you ask and what you ask FOR – exactly 清晰的知道你为什么去开口以及你开口要什么
- Know why you ask NOW 知道你为什么要现在开口
- WHO will ask – make sure the right people are sitting at the table 在向谁开口-确保坐在对面的是正确的人

Donor Segments

捐赠人细分

- ◆ Annual Fund 年度捐赠
- ◆ Midsize –Gifts 中等捐赠
- ◆ Major Gifts 大额捐赠
- ◆ Leadership Gifts 领导力捐赠
- ◆ Transformational Gifts 转化捐赠

What to offer your donor (Products)

向捐赠人提供什么产品

◆ **Donation restricted/unrestricted** 限定性/非限定性捐赠

- ◆ Of cash 现金
- ◆ Of stocks, real estate, or other assets 股票, 房产或其他资产
- ◆ In-kind 实物

◆ **Endowment** 基金

- ◆ Unrestricted gift to Endowment 对基金的非限定性捐赠
- ◆ Subject Endowment 专项基金

◆ **Life-time gifts** 终身捐赠

- ◆ Remainder Trusts 剩余信托
- ◆ Real Estate in Trust 房地产信托

◆ **Legacy** 遗产

- ◆ Percentage of total estate 所有遗产的百分比
- ◆ Specific item of estate 遗产的特定明细

给予干净的水

通过捐赠干净的水向你爱的人表达敬意。
你的捐赠将100%用于需要帮助的人，你还可以定制一张电子卡和邮件来分享这份影响力。

Give clean water

Honor the people you love with a donation to clean water. 100% of your gift will help people in need, and you can customize your e-card and email to share the impact.



Clean water for four people

\$120



Clean water for ten people

\$300

A screenshot of a UNHCR donation page. The page features the UNHCR logo at the top left and navigation icons at the top right. The main content is a blue banner with white text. The text reads: "More suffering for the people of Syria". Below this, there is a paragraph: "The recent escalation of conflict in northwestern Syria has made it even harder for Syrian families to find their homes. They are on a quest for basic services, are struggling to get food, housing, healthcare and other basic essentials for their families. UNHCR is on the ground doing all we can to reach and protect them but we can't do this alone." To the right of the text, there are three donation options: "\$10 could provide medicine to protect a family for 10 days, on the ground.", "\$20 could provide basic medicines to keep 2 children safe at night.", and "\$30 could provide essential medicines to enable 2 families to prepare food." At the bottom left of the banner, there is a yellow "Donate" button. The background of the banner shows a close-up of a young girl's face, looking slightly to the side.

捐赠指南
能改变一切的礼物
在这个节日里，用能改变生命的礼物来致敬你爱的人

GIFT GUIDE

Gifts that Change Everything

This holiday season, honor the people you love with a gift that transforms lives.

Gifts that Give Water

100% of donations bring clean water to people in need.



Give clean water

Honor the people you love with a donation to clean water. 100% of your gift will help people in need, and you can customize your e-



Clean water for
one person

\$30



Clean water for
two people

\$60

Thanking your donor

感谢捐赠人

- ◆ **Make it meaningful to your donor!** 使之对捐赠人有意义
- ◆ **Think out of the box!** 打破陈规!



- ◆ **Personal 个性化**
 - ◆ By name 名字
 - ◆ Handwritten 手写
 - ◆ By video message 视频信息
- ◆ **Timely 及时**
 - ◆ Immediately when online 在线时立刻发出
 - ◆ Within a day when „analog“ 在某个特定日子的特殊时刻

Stewarding your donor 服务捐赠人





Donors of the Week

Each week, we celebrate two donors for their continued support.

本周捐赠人
每周我们会为两个捐赠人的持续支持而庆祝

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**Donor Spotlight | Week of
December 3**

Nov 30, 2018

SickKids Foundation acknowledges Ripley's
Aquarium of Canada and Chatime



**Donor Spotlight | Week of
November 26**

Nov 23, 2018

SickKids Foundation acknowledges Brattys LLP
and SCADDABUSH





Tracking Our Impact and Sharing Results

Literacy Program
Dashboard

Girls' Education
Program Dashboard



The not so secret secret of donor retention

不是秘密的保留捐赠人的秘密

◆ Stay in touch 保持联系

- ◆ Send the occasional letter /SMS/Message via Social Media/ phone call 时不时通过社交媒体或手机发送信件、短信、消息
- ◆ Inform them about impact of their gift 告知他们捐赠所带来的影响



◆ Offer insights/information that others don't get 提供别人无法获得的信息

- ◆ Let them be the first to know of new developments 让他们成为第一个知道最新发展的人

◆ Engage them in activities that others don't have access to 让他们参与别人参与不了的活动

- ◆ Engage them in processes where their expertise may help 邀请他们参与他们专业领域可以提供帮助的事情



◆ Prepare the next larger gift opportunity 准备下一个更大额捐款的机会

- ◆ Inform them about new projects and initiatives early on 尽早通知他们新的项目和计划

Ethics in Fundraising

筹款伦理



- Why does it matter? 为什么重要
 - Credibility 公信力
 - Of the organization 机构的
 - Of the fundraiser 筹款人的
- What does it require? 需要具备什么?
 - Transparency 透明的
 - Clear Rules 清晰的规则
 - Everyone's commitment 所有人的承诺

- ◆ What is the responsibility of the fundraiser? 筹款人的责任是什么?
 - ◆ Promise only what you can actuate 只承诺你能推动的
 - ◆ Be prepared to reject a gift 做好拒绝捐赠的准备
 - ◆ When lines are overstepped 当越线的时候
 - ◆ When the source may be illegitimate 当资源是非法的时候
- ◆ What is the result/benefit? 结果/好处是什么
 - ◆ Trust 信任
 - ◆ Organization's reputation 组织声誉
 - ◆ Repeat Gifts 重复捐赠
 - ◆ Referrals 推荐

Thank you!
谢谢!

