



Face-to-Face Basics: Integrating Individuals into Your Development Plan

Presented by:
Amy M. Eisenstein, MPA, CFRE

September 15, 2011

1:00 – 2:30 p.m. Eastern
Noon – 1:30 p.m. Central
11:00 a.m. – 12:30 p.m. Mountain
10:00 – 11:30 a.m. Pacific
9:00 – 10:30 a.m. Alaska



Association of Fundraising Professionals
4300 Wilson Boulevard, Suite 300, Arlington, VA 22203-4168
800-666-3863 (U.S. & Canada) • 866-837-1948 (Mexico)
www.afpnet.org

Amy M. Eisenstein, MPA, CFRE

Amy M. Eisenstein, MPA, CFRE is the Principal of Tri Point Fundraising a full-service consulting firm. Before creating Tri Point, Amy raised millions of dollars for large and small nonprofits through events, grant writing, capital campaigns, direct mail, and major and planned gift solicitations.

Check out Amy's new book, [50 Asks in 50 Weeks: A Guide to Better Fundraising for Your Small Development Shop](#), for help creating a fundraising plan. Amy is a frequent speaker at conferences and board retreats, and would love the opportunity to energize your board and staff members.

Amy currently serves as the VP of Development for the AFP -NJ Chapter. She received her MA in Public Administration and Nonprofit Management from the Wagner Graduate School at NYU. Amy has been a Certified Fundraising Executive (CFRE) since 2004.

Amy can be reached at her website: tripointfundraising.com.

AFP Web/Audioconference September 15, 2011

Face-to-Face Basics Integrating Individual Giving into Your Development Plan



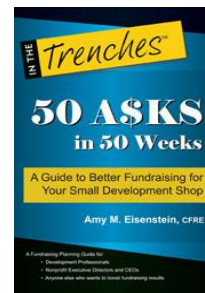
Presented by
Amy Eisenstein, CFRE
TRI POINT FUNDRAISING
TWITTER: @AMYEISENSTEIN



Amy Eisenstein, MPA, CFRE is the Principal of Tri Point Fundraising a full-service consulting firm. Before creating Tri Point, Amy raised millions of dollars for large and small nonprofits through events, grant writing, capital campaigns, direct mail, and major and planned gift solicitations.

Check out Amy's new book, [50 Asks in 50 Weeks: A Guide to Better Fundraising for Your Small Development Shop](#), for help creating a fundraising plan. Amy is a frequent speaker at conferences and board retreats, and would love the opportunity to energize your board and staff members.

Amy currently serves as the VP of Development for the AFP -NJ Chapter. She received her MA in Public Administration and Nonprofit Management from the Wagner Graduate School at NYU. Amy has been a Certified Fundraising Executive (CFRE) since 2004.



Amy can be reached at her website: tripointfundraising.com.



Why Face-to-Face?

More than 80% of donations come from individuals.

Less than 20% come from corporations and foundations combined.



Bored Board?



Start with Your Board



100% Participation



Don't Let this Happen to You!



How Much is Enough?



Board Minimums –
Required amount to
serve on a board.

Stretch Gift –
A large gift for donor's
personal budget.



#1 Charity



Give and Get



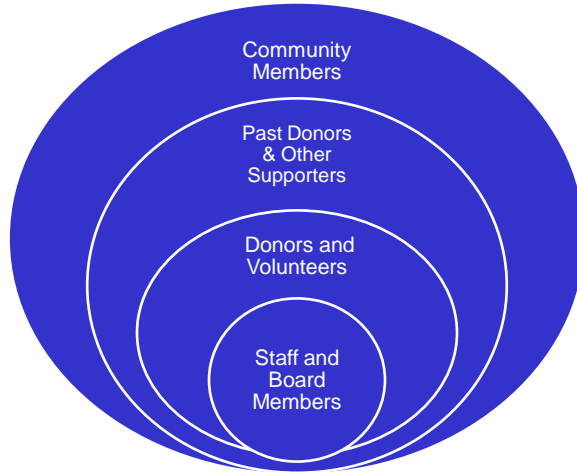
Do You Have a Fundraising Board?



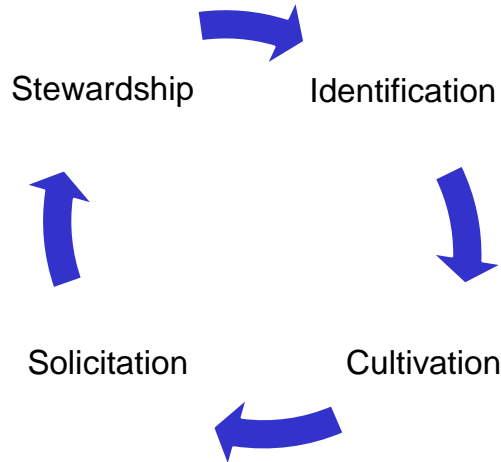
How to Motivate Your Board Members



Donors and Potential Donors



Fundraising Cycle



Identification



What Makes a Good Prospect?

Capacity: Having the money to give.



Inclination: Interest in your cause, mission, or organization.



Your Database is a Goldmine



Bulk Mail (Snail and Electronic)



Largest Donors

Make a list of your largest donors.

Be sure to include one time gifts and cumulative giving.



Make Your Top 10 List



Loyal Donors

Repeat donors:

- 3 of the last 5 years
- 7 of the last 10 years

At any level of giving.



Now Make a Longer List

Make a list of your best prospects.

Include your largest and most loyal donors.
Develop a list of your top 20 - 30 prospects.



Use Current Networks



Friend-Raising



Don't Miss Any Opportunities



Cultivation



Create a Plan



Getting the 1st Meeting



Gratitude



Heart Strings



Volunteerism and Engagement



Pick Up the Phone



Relationship Building



Ask Good Questions

- Open ended
- Lead to next gift

Examples:

- What first drew you to our organization?
- What do you like most about our programs?
- How could we improve?
- Would you be interested in personally supporting these programs and in what way? (Provide options.)



Cultivation Activities

- Meeting at home or office
- Program tour
- Volunteer opportunity
- Serve on committee
- Attend fundraising event
- Attend program event



Cultivation Outcomes



Solicitation



How Much?



Know What You're Asking For



Who Should Ask?



Where to Ask?



Sit Back and Be Quiet



Be Prepared to Respond



Stewardship



Break for Questions

For more information on individual fundraising
and a copy of my FREE eBook:

Simple Things You're NOT Doing to Raise More Money,
4 Simple Secrets to Big Bucks Fundraising

Visit my website: tripointfundraising.com



How to Raise More Money

Start with your board.

Identify your top donors.

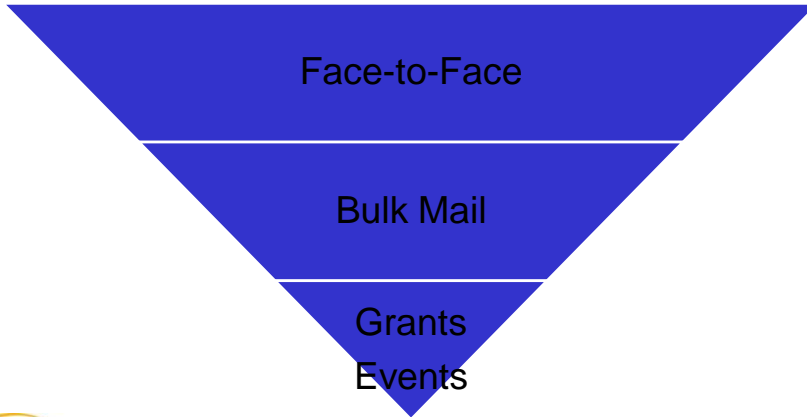
Build relationships.

Ask for a specific gift.

Express gratitude.



Call to Action



If you don't ask, you won't get.



Coming Next....



**September 28, 2011
1:00 – 2:30 p.m. ET**

***Nonprofit Internet Management
Strategies, Tools and Trade
Secrets***

TED HART, ACFRE

For a listing of the 2011 AFP Web/Audioconference Series, please visit our website at www.afpnet.org in the professional development section.





CERTIFICATE OF PARTICIPATION

**I was a participant in the AFP Webconference held
September 15, 2011
1:00 – 2:30 PM Eastern**

***Face-to-Face Basics: Integrating Individuals into Your
Development Plan***

**Presented by:
Amy M. Eisenstein, MPA, CFRE**

Full participation in this session is applicable for 1.5 points in Category 1.B – Education of the CFRE International application for initial certification and/or recertification.

Signed _____

This is for your records only.

Association of Fundraising Professionals

September 15, 2011

Face-to-Face Basics: Integrating Individuals into Your Development Plan

You may use this form to capture your immediate impressions.
Please complete the evaluation online by **September 22, 2011** at:
<http://www.surveymonkey.com/s/VTXF73H>

	EXCELLENT			AVERAGE		POOR	
	(7)	(6)	(5)	(4)	(3)	(2)	(1)
1. OVERALL RATING	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. CONTENT	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. HANDOUTS	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. AUDIO QUALITY	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. EASE OF REGISTRATION	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. SIMILARITY OF ACTUAL PROGRAM VERSUS ADVERTISED CONTENT	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. VALUE	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

PRESENTER: OVERALL EFFECTIVENESS

8. Amy M. Eisenstein, MPA, CFRE

MY SITE PARTICIPATED AS: A WEBCONFERENCE AN AUDIOCONFERENCE

WOULD YOU PARTICIPATE IN ANOTHER VIRTUAL SEMINAR? **YES** **NO**

WHAT WAS YOUR OVERALL IMPRESSION OF THE EVENT AND THE VIRTUAL SEMINAR FORMAT? ANY ADDITIONAL COMMENTS?

NAME (OPTIONAL): _____

SITE LOCATION: _____

YOUR FEEDBACK IS IMPORTANT! YOU MAY COMPLETE AN ELECTRONIC EVALUATION AT
<http://www.surveymonkey.com/s/VTXF73H>



Association of Fundraising Professionals

2011 WEB/AUDIOCONFERENCES

Educating Fundraisers in the 21st Century



- **FEBRUARY 16, 2011, WEDNESDAY**
Planning to Keep Your Donors
John Joslin, CFRE
- **FEBRUARY 24, 2011, THURSDAY**
It's Not About You, It's About Them: the New Imperative in Corporate Fundraising
Jason Saul, Author
- **MARCH 2, 2011, WEDNESDAY**
The Secrets of Consultants
Penelope Cagney, CFRE
- **MARCH 24, 2011, THURSDAY**
Seriously Good innovation... in Practice!
Jon Duschinsky
- **APRIL 7, 2011, THURSDAY**
Strengthening Foundation Relationships
John Greenhoe, CFRE
- **APRIL 20, 2011, WEDNESDAY**
Social Networking and Online Fundraising Success
Ted Hart, ACFRE
- **MAY 4, 2011, WEDNESDAY**
Managing Prospect Relationships and Fundraising Activity in a Campaign
Elizabeth Crabtree, Director of Prospect Development at Brown University
Sponsor: *The Association of Prospect Researchers for Advancement (APRA)*
- **MAY 19, 2011, THURSDAY**
Developing a Planned Giving Marketing Plan
Timothy Logan, ACFRE
- **JUNE 1, 2011, WEDNESDAY**
Campaign Reporting
Elizabeth Crabtree, Director of Prospect Development at Brown University
Sponsor: *The Association of Prospect Researchers for Advancement (APRA)*
- **JUNE 21, 2011, TUESDAY *3:00 PM EASTERN***
How to Raise More by Selling your Impact
Jason Saul, Author
- **JULY 13, 2011, WEDNESDAY**
When Raising Money 10 Legal Matters to Avoid
Marty Martin, JD, MPA
- **JULY 26, 2011, TUESDAY**
Building Relationships that Pay Off
John Hicks, CFRE
- **AUGUST 24, 2011, WEDNESDAY**
Raising More Money From Your Business Community
Linda Lysakowski, ACFRE
- **SEPTEMBER 15, 2011, THURSDAY**
Face-to-Face Basics: Integrating Individuals into Your Development Plan
Amy Eisenstein, CFRE
- **SEPTEMBER 28, 2011, WEDNESDAY**
Nonprofit Internet Management Strategies, Tools and Trade Secrets
Ted Hart, ACFRE
- **OCTOBER 4, 2011, TUESDAY**
Structuring Your Development Office for Success
Monique Hanson
- **OCTOBER 27, 2011, THURSDAY**
From Boomers to Echo Boomers: Giving Across the Generations
June Bradham, CFRE, Rachel Hutchisson & Tucker Branham, CFRE
- **NOVEMBER 1, 2011, TUESDAY**
Donor Centered Planned Gift Marketing
Michael J. Rosen, CFRE
- **NOVEMBER 17, 2011, THURSDAY**
Digital Mobilization on Giving
Marcelo Iniarra
- **DECEMBER 6, 2011, TUESDAY**
Secrets of Success in the Small Shop
Sandy Rees, CFRE
- **DECEMBER 14, 2011, WEDNESDAY**
Building a Major Gifts Program through Integrated Solicitations
Adam Burk, CFRE



Continuing Education **CFRE Approved Continuing Education Provider**

*Please note each Web/Audioconference session offers CFRE points!

*Web/Audioconferences will be held at 1:00-2:30 p.m. Eastern / 12:00-1:30 p.m. Central
11:00 a.m.-12:30 p.m. Mountain / 10:00-11:30 a.m. Pacific / 9:00-10:30 a.m. Alaska (*except on June 21, 2011)*

FEES: \$159 (U.S.) per member session; \$295 (U.S.) per nonmember session

Special AFP Member Bundle - \$99 per session when registering for 10 or more programs at one time!



AFP 2010/2011 WEB/AUDIOCONFERENCE SERIES

- February 16, 2011 John Joslin, **Planning to Keep Your Donors**
- March 2, 2011 Penelope Cagney, **The Secrets of Consultants**
- March 24, 2011 Jon Duschinsky, **Seriously Good Innovation... In Practice!**
- April 7, 2011 John Greenhoe, **Strengthening Foundation Relationships**
- April 20, 2011 Ted Hart, **Social Networking and Online Fundraising Success**
- May 4, 2011 Elizabeth Crabtree, **Managing Prospect Relationships and Fundraising Activity in a Campaign**
- May 19, 2011 Timothy Logan, **Developing a Planned Giving Marketing Plan**
- June 1, 2011 Elizabeth Crabtree, **Campaign Reporting**
- June 21, 2011* Jason Saul, **How to Raise More by Selling your Impact**
- July 13, 2011 Marty Martin, **When Raising Money 10 Legal Matters to Avoid**
- July 26, 2011 John Hicks, **Building Relationships that Pay Off**
- August 24, 2011 Linda Lysakowski, **Raising More Money From Your Business Community**
- September 15, 2011 Amy Eisenstein, **Face-to-Face Basics: Integrating Individuals into Your Development Plan**
- September 28, 2011 Ted Hart, **Nonprofit Internet Management Strategies, Tools and Trade Secrets**
- October 4, 2011 Monique Hanson, **Structuring Your Development Office for Success**
- October 27, 2011 June Bradham, Rachel Hutchisson & Tucker Branham, **From boomers to Echo boomers: Giving Across the Generations**
- November 1, 2011 Michael J. Rosen, **Donor Centered Planned Gift Marketing**
- November 17, 2011 Marcelo Iniarra, **Digital Mobilization on Giving**
- December 6, 2011 Sandy Rees, **Secrets of Success in the Small Shop**
- December 14, 2011 Adam Burk, **Building a Major Gifts Program through Integrated Solicitations**

This order is for Live Event, Download, CD (\$5.00 for shipping in the U.S., \$20 for International orders)

*Webconferences will be held at 1:00-2:30 p.m. Eastern / 12:00-1:30 p.m. Central
 11:00 a.m.-12:30 p.m. Mountain / 10:00-11:30 a.m. Pacific / 9:00-10:30 a.m. Alaska (*except on June 21, 2011)
 FEES: \$159 (U.S.) per member site per session; \$295 (U.S.) per nonmember site per session
 Special AFP Member Bundle - \$99 per session when registering for 10 or more programs at one time!*

Four ways to register:

Online: <http://afp.peachnewmedia.com>
 Fax: 781-723-0433
 Phone: 770-805-6292
 Mail: Peach New Media, 153 Prospect Street, Suite 330, Marshfield Hills, MA 02051

Please print clearly (especially the email address)

Name _____ Member ID# _____ Title _____
 Organization _____
 My Site is sponsored by an AFP Chapter Chapter Name _____
 Street Address _____
 City _____ State/Province _____ Zip/Postal Code _____ Country _____
 Phone _____ Fax _____ Email _____

Can't make a Webconference? Purchase the recorded session as a download or on CD.
 Call 877-728-3904 or visit our website at <http://afp.peachnewmedia.com>

(Payment must accompany registration and must be paid in U.S. funds)

Method of payment (check one):

Check enclosed payable to *Peach New Media*
 MasterCard VISA Am. Ex. Discover

Card # _____ CVV Code _____ Exp. _____ Signature _____

3-digit code on back of card

Billing Address: _____ City _____ State _____ Zip _____