

Empowering Your Board to Succeed in Fundraising!

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ABOUT Pursuant Group

- Founded in 2001
- More than 150 employees
- Acquired:
 - Ketchum and RSI in 2009
 - Charitable Partners in 2008
- We serve:
 - Faith-Based Organizations (Churches and Parachurches)
 - Higher Education
 - Health and Human Service Organizations

Known for thought leadership in innovative fundraising, donor intelligence, and major giving consulting.



DONOR DEVELOPMENT

Planned Giving

Emerging Giving

Annual Giving

Prospecting

Major Giving

Recurring Giving

Participation, Volunteer, Advocacy



ENGAGEMENT CHANNELS



Social Media | Mobile | Email | Web | Mail | Telephone | Events | Face-to-Face

MARKET SEGMENTS



Higher Education | Healthcare | Sports | Cultural | Church | Parachurch | Ministry

Pursuant / Ketchum

Pursuant / RSI

WHAT WE DO

Consulting Services

- Integrated Fundraising Strategy Studies
- Capital Campaign Counsel
- Feasibility / Planning Studies
- Managed Services
- Outsourced Mid & Major Gift Solicitation
- Social Media Strategy
- Strategic Analytics
- Communications Audits
- Technology Consulting
- Board Development

Agency & Creative Services

- Video Production
- eSolicitations
- Interactive Annual Reports
- Online Magazines
- Web Design & Development
- iPhone Apps
- eNewsletters
- Print/Mail



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Client Snapshot

- Our average client can do very little cherry-picking
- Our typical clients are organizations that are not fully staffed
- Most of our clients are on the verge of significant growth, and have limited recent successful campaign experience
- For many of our clients, their leadership is willing but perhaps inexperienced, not yet maximizing their involvement or has yet to enjoy fundraising
- Our clients cannot afford to fail

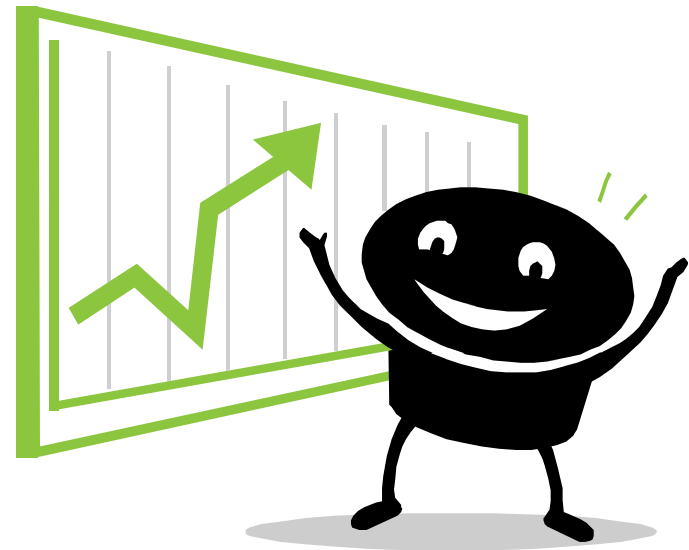
Route Map

- **Best Practices**
- **Attitude Shift**
- **Board and Staff Responsibilities**
- **Assessments**
- **Focus Board Attention**
- **Q & A throughout**



Shift the 'Tude

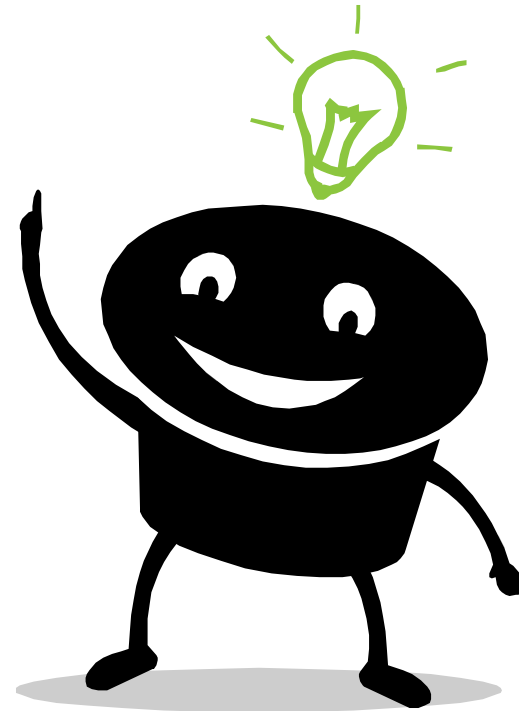
- ❑ **Board members are our friends**
- ❑ **Board has good intentions**
- ❑ **Board has resources and skills**
- ❑ **I am responsible for the Board I have**
- ❑ **Create win-wins**



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Revelation or Fact?

**Treat Board
members like you
treat major
donors!**



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Staff to Board

Board members are our friends.



- Training
- Support
- Engagement
- Empowerment
- Success



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Board to Staff



- ❑ **Committed**
- ❑ **Responsive**
- ❑ **Engaged**
- ❑ **Involved**



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All About Style



- **Communication**
- **Cultivation**
- **Caring**

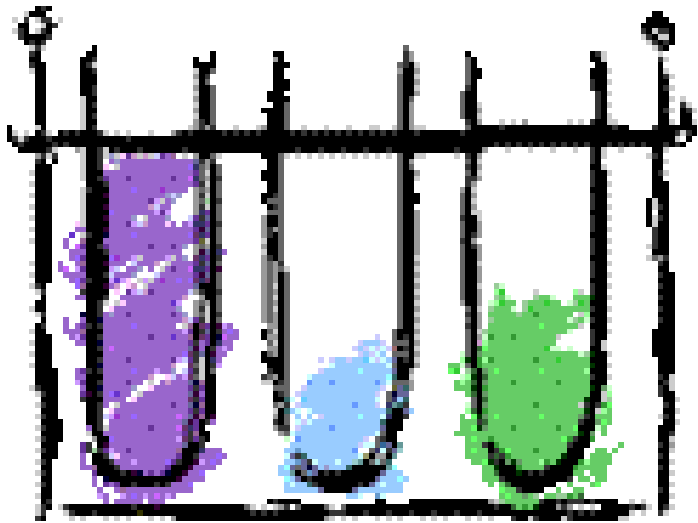


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Assessments



- **Use the tools**
- **Self Assessment**
- **Board Assessment**



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On Boarding Process



- ❑ **Nominations**
- ❑ **Application**
- ❑ **Twice a Year**
- ❑ **Orientation**
- ❑ **Peer Program**



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Focus Attention



- **Agendas**
- **Board Materials**
- **Communication**



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Fundraising and the Board



- ❑ **Strategic List Development**
- ❑ **Partner with the Board**
- ❑ **Training**
- ❑ **Tools**



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BENEFITS of ISS



Prioritization of objectives & resources

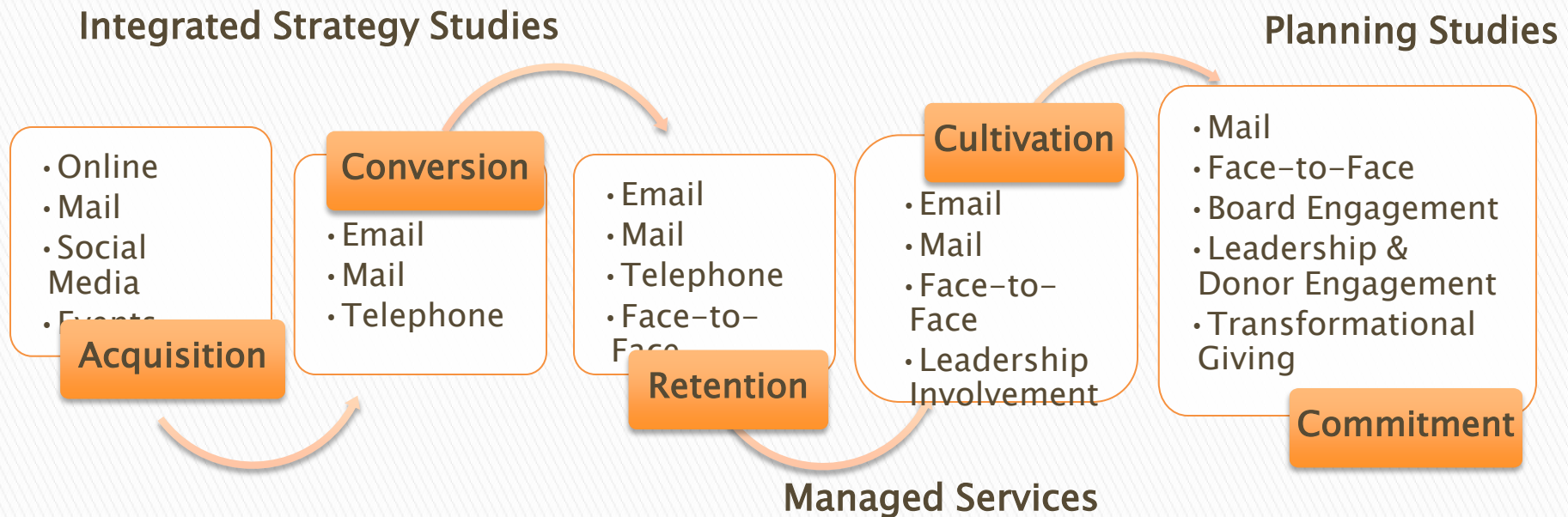
Insight into current donor behavior, including metrics and past results

Development of a comprehensive, holistic, and integrated long-term strategy



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CONSTITUENT Relationship Management



Donor Intelligence through observation

Focus on Lifetime Value of the supporter

DEFINING Integrated Strategy Study

in·te·gra·ted stra·te·gy stu·dy

a comprehensive data and communication audit and integrated strategy development that will help inform your priorities against your fundraising goals

Five Key Components

- Technology Audit
- Data Audit (last 7 years)
- Communication Audit
- Staff Interviews
- Strategy Development

Four Distinct Phases

- Pre-Discovery
- Discovery
- Strategy Development
- Program Development

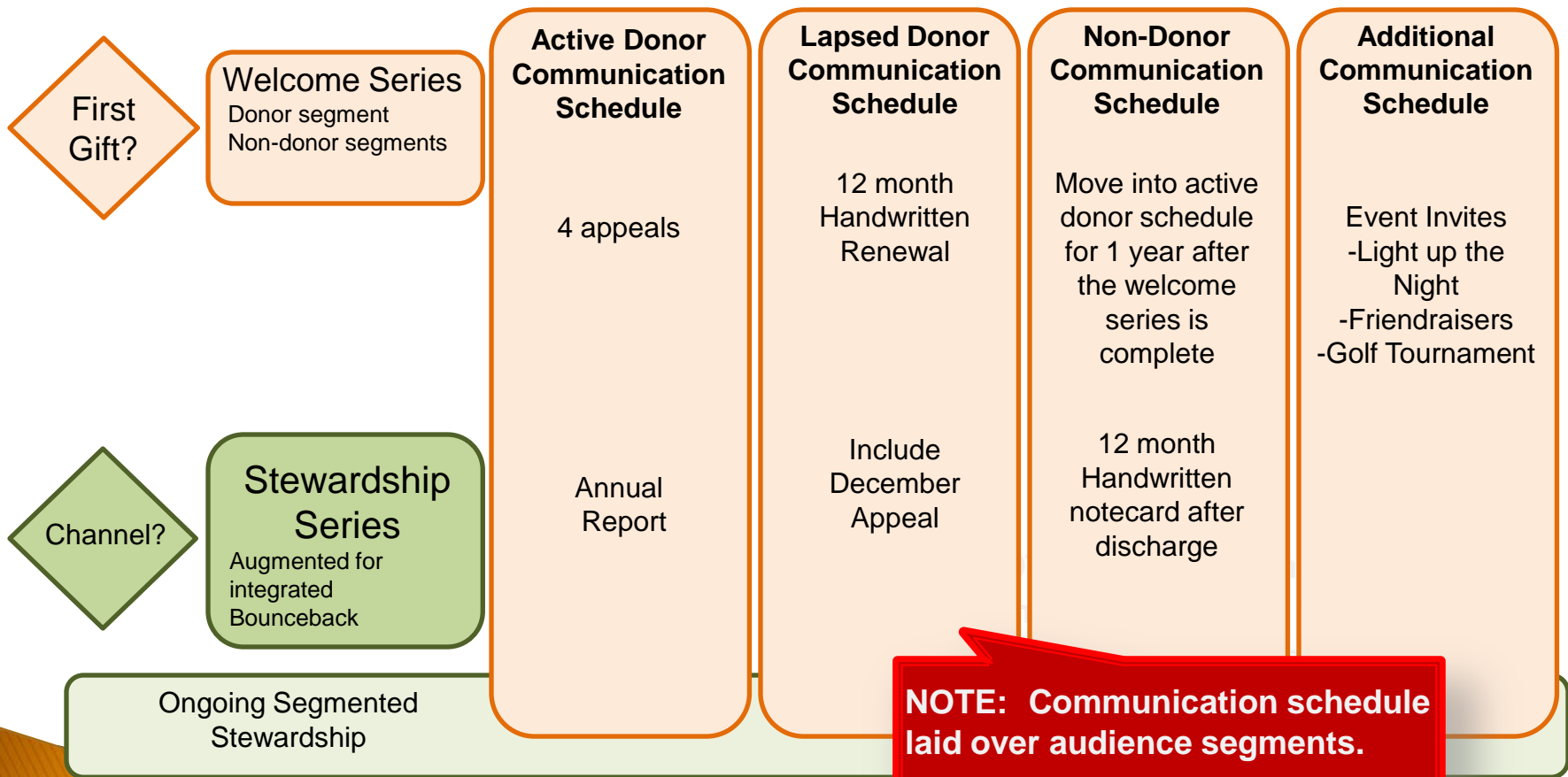


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REVIEW OF Audit/Key Findings

Gift Year	2009	2008	2007	2006	2005	2004	
New Donors	Donors	692	754	805	1420	991	2497
	Total Giving	\$173,539	\$159,643	\$164,415	\$295,395	\$197,518	\$572,177
	Number of Gifts	790	837	923	1481	1045	2778
	Average Gift	\$220	\$191	\$178	\$199	\$189	\$206
	Frequency	1.06	1.14	1.11	1.14	1.04	1.05
	Donor Value	\$233.46	\$218.04	\$197.59	\$228.15	\$197.10	\$217.22
	Attrition Rate	N/A	76.9%	81.0%	79.6%	77.9%	71.1%
2nd Year Donors	Donors	174	153	289	219	721	
	Total Giving	\$67,691	\$44,016	\$75,678	\$82,377	\$284,766	
	Number of Gifts	206	202	361	239	847	
	Average Gift	\$329	\$218	\$210	\$345	\$336	
	Frequency	1.18	1.32	1.24	1.09	1.17	
	Donor Value	\$389.50	\$287.80	\$262.31	\$376.50	\$394.70	
	Attrition Rate	N/A	42.5%	58.5%	46.1%	39.4%	
Multi-Year Donors	Donors	88	120	118	437		
	Total Giving	\$23,391	\$31,433	\$49,482	\$200,645		
	Number of Gifts	139	163	142	569		
	Average Gift	\$197	\$193	\$348	\$353		
	Frequency	1.57	1.35	1.20	1.30		
	Donor Value	\$311.06	\$262.09	\$418.64	\$459.60		

STRATEGY Roadmap



Final Thoughts

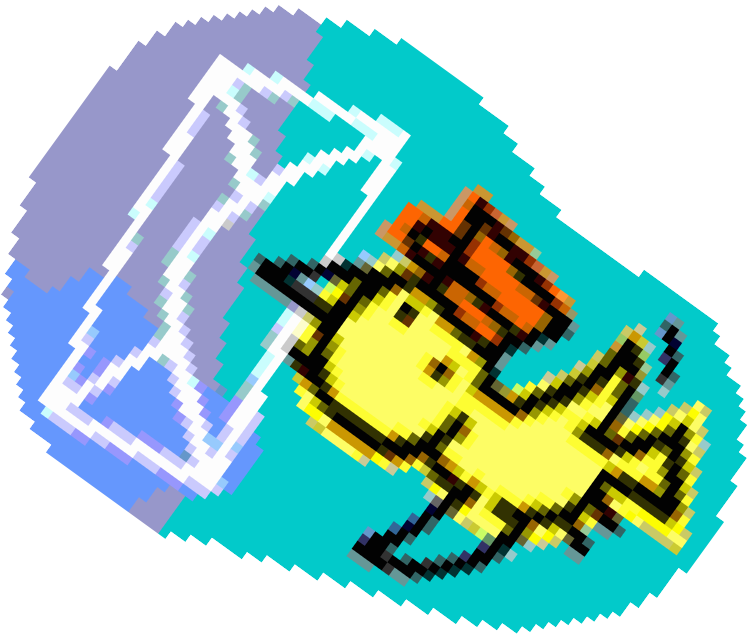


- ❑ **Commitment**
- ❑ **Ongoing**
- ❑ **Use the Tools**
- ❑ **Engage others in the process**



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Thank you!



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