

IE♥**HP** Foundation

IE VIBRANT HEALTH FORUM

Building Bridges to Big Gifts

Unlocking the Power of Individual Donors

Welcome!



Who's Here!

IE VIBRANT HEALTH FORUM

- About Families
- Advantage Public Institute
- Agape Legal Services
- Alzheimer's Coachella Valley
- American Heart Association
- Asie and Learn4life
- Autism Heroes
- Autism Society Inland Empire
- Barstow College Foundation
- Big Brothers Big Sisters of Orange County and the Inland Empire
- Boys & Girls Club of Southwest County
- Boys & Girls Clubs of Greater Redlands-Riverside
- Boys Republic
- Brown Sugar n Coffee Inc
- Building Resilient Communities
- CA Health Collaborative - Black Infant Health
- Caring and Concerned
- Carol's Kitchen
- Catholic Charities San Bernardino & Riverside
- Cedar House Life Change Center
- Centro del Inmigrante CDI
- Chaffey College Foundation
- Children's Fund
- Chino Valley Chamber of Commerce
- Christian Development Center
- City of Riverside, Parks Recreation Community Services
- CityLink Water of Life
- Civil Rights Institute of Inland Southern CA
- Community Access Center
- Community Action Partnership of San Bernardino County
- Community Health Action Network
- Community Health Systems, Inc.
- Community Settlement Association
- Corona-Norco Family YMCA
- Creative Excellence
- DHCS-Maximus CA HCO
- Dignity Health
- Dignity Health Foundation - Inland Empire
- East Valley Community Health Center
- El Sol Neighborhood Educational Center
- Families Achieving Success
- Family Service Association
- Feeding America Riverside | San Bernardino (FARSB)
- Fifth District Supervisor Yxstian Gutierrez
- First 5 San Bernardino
- Friends of Family Health Center
- Giving 365
- Gonser Gerber
- Goodwill Southern California
- Greater Hope Foundation for Children, Inc
- Green Parakeet LLC
- Growing Outreach Growing Opportunities
- HARC
- Health Career Connection
- Healthy Valley Foundation
- High Desert Community Foundation, Inc.
- Hope Through Housing
- Hope through Housing Foundation
- Human Migration Institute
- I.E. CEEM INC.
- IEHP
- IEHP Foundation
- Independent Living Partnership
- Inland Counties Legal Services
- Inland Empire Breastfeeding Coalition
- Inland Empire Community Health Initiative
- Inland Empire Prism Collective
- Inland Empire Rebound

Who's Here!

IE VIBRANT HEALTH FORUM

- Inland Empire Ronald McDonald House
- Inland Equity Community Land Trust
- Inland Housing Solutions
- Inland SoCal United Way
- Integrity Barbering
- ISCH Collective
- Ives Torres Foundation
- Junior Achievement of Orange County and Inland Empire
- Keep Riverside Clean and Beautiful
- LaunchPad Collective
- Leap for Joy Foundation
- Learn4Life
- Linden Oaks
- Loma Linda University Children's Hospital Foundation
- Los Angeles Mission
- LW Consulting
- Major Change Youth & Adult Support Services
- Major Change Youth and Adult Support Services
- Mary's Mercy Center
- Michelle's Place Cancer Resource Center
- Microenterprise Collaborative of Inland Southern CA
- Mission Hope
- MLGC
- Moses House Ministries
- Mrs. B's Table
- Nehemiah Charitable Fund
- Neighborhood Healthcare
- New Life Fellowship Church
- Ontario-Montclair School District
- OPARC
- Operation New Hope
- Out of the Ashes Organization
- Pacific Clinics
- Parenting Education Center
- Project Boon
- Project K.I.N.D. (Kids in Need of Doctors)
- Providence St Mary Medical Center Foundation
- Purpose And Zeal
- Reach Out
- Riverside County Medical Association
- Rainbow Pride Alliance
- Riverside Unified School District Foundation
- RMC Charitable Foundation
- Rock'n Our Disabilities Foundation
- Rolling Start, Inc.
- RUHS Foundation
- SAC Health
- Samaritan Counseling Center
- San Bernardino County Medical Society
- San Bernardino Valley College Foundation
- Savvy Speech Therapy
- SBX Youth and Family Services
- Service Center for Independent Life (SCIL)
- Smile Unto Him
- The City Center SB
- The Happier Life Project
- The Heart Matters Foster Family Agency
- The International Rescue Committee, Los Angeles
- The Love Program
- The Way Resource Center
- UCR
- University of La Verne
- Vivian Stancil Olympian Foundation
- Vocational Rehabilitation Services
- W.I.N.G. Foundation
- Water of Life Community Church/CITYLINK
- Wellness Ranch Equine Assisted Therapy
- WonderLab
- Young Visionaries Youth Leadership Academy

Agenda

Lunch and Networking

Welcome, Table Introductions & Program Overview

Greg Bradbard, CEO, IEHP Foundation

Regina Weatherspoon-Bell, Vice Chair, IEHP Foundation

Opening Remarks

Dr. Yxstian Gutierrez, Supervisor, County of Riverside & IEHP Governing Board Chair

Building Bridges to Big Gifts - Interactive Session

Erin Phillips, Gonser Gerber

Lisa Wright, CFRE, Green Parakeet

Launa Wilson, LW Consulting

Closing Remarks

Greg Bradbard, CEO, IEHP Foundation

IE VIBRANT HEALTH FORUM

Building Bridges to Big Gifts



Greg Bradbard
Chief Executive Officer
IEHP Foundation



Regina Weatherspoon-Bell
Vice Chair
IEHP Foundation

IE VIBRANT HEALTH FORUM

Building Bridges to Big Gifts



Welcome & Opening Remarks



Dr. Yxstian Gutierrez
Supervisor, County of Riverside
Board Chair, IEHP Governing Board

IE VIBRANT HEALTH FORUM

Building Bridges to Big Gifts

Meet the Speakers



Erin Phillips
Gonser Gerber LLP



Launa Wilson
Launa Wilson Consulting



Lisa Wright
Green Parakeet
Consulting



Today's Goals

- 1. Understand** the opportunity individual giving presents to your organization's mission.
- 2. Identify** how you can build on what you are already doing so that you can capture more of this opportunity.
- 3. Walk away** with tangible strategies and tactics that you can put into play this year.

Who You Are!

- In your table, please elect a conversation leader. Conversation leaders will help get conversation going, equalize the amount of time people are sharing, and keep the group on time.
- Please do intros (name and organization) as well as elect a leader. Less than 5 minutes.
When you hear us clapping, that's your cue to come back.



Individual Giving

Menti Polls with Giving USA Data

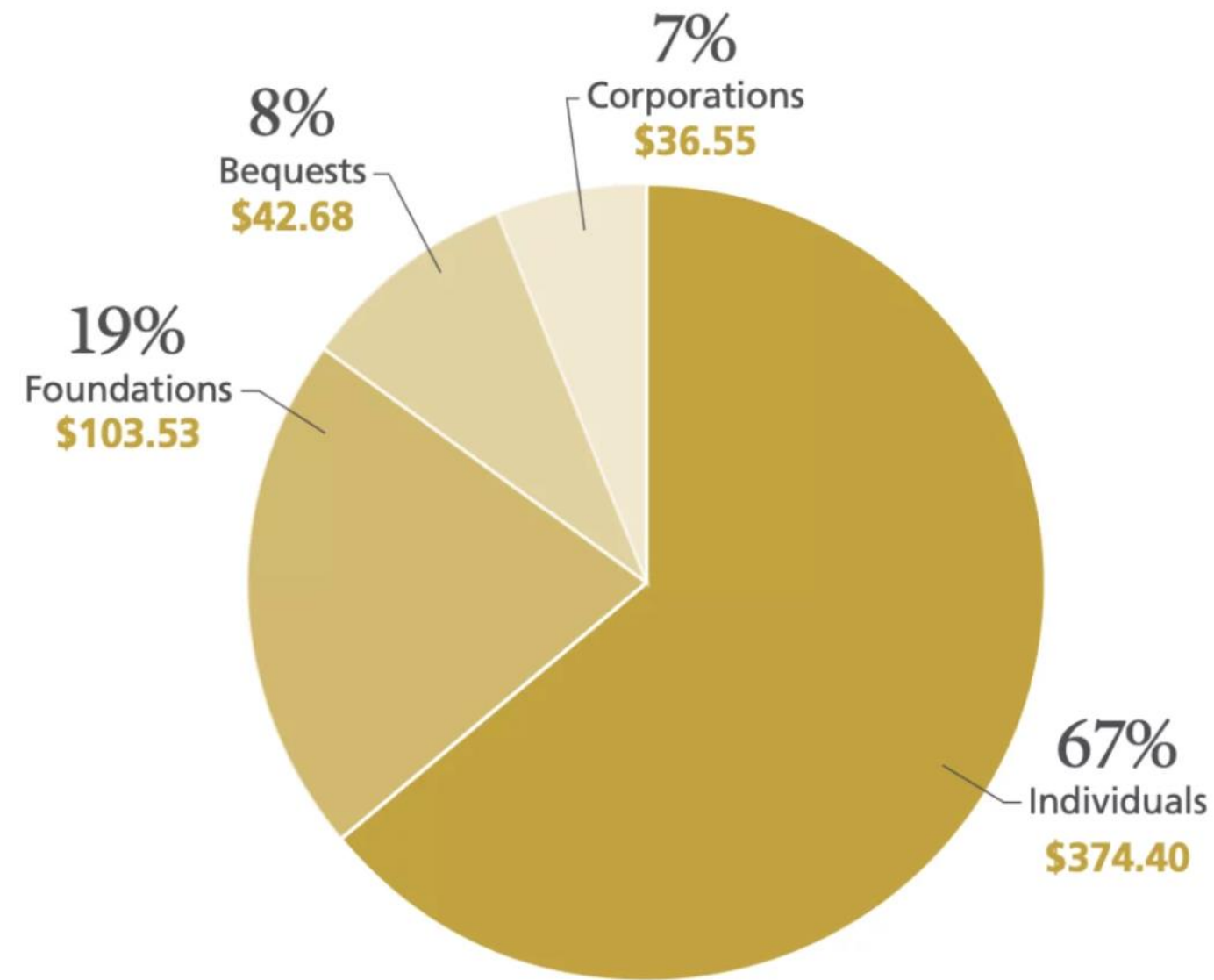
- In the most recent report from Giving USA: what percentage of contributions were from individuals (tip: it was on the invitation for this workshop!)
- What percentage of your organization's donations are individual gifts (non-events)? - approximate
- What percentage of time do you spend with individual donors (non-event)?

Join by scanning the QR Code or
Go to [menti.com](https://www.menti.com) and use code **1597 0507**



2023 contributions: \$557.16 billion by source of contributions

(in billions for dollars – all figures are rounded)

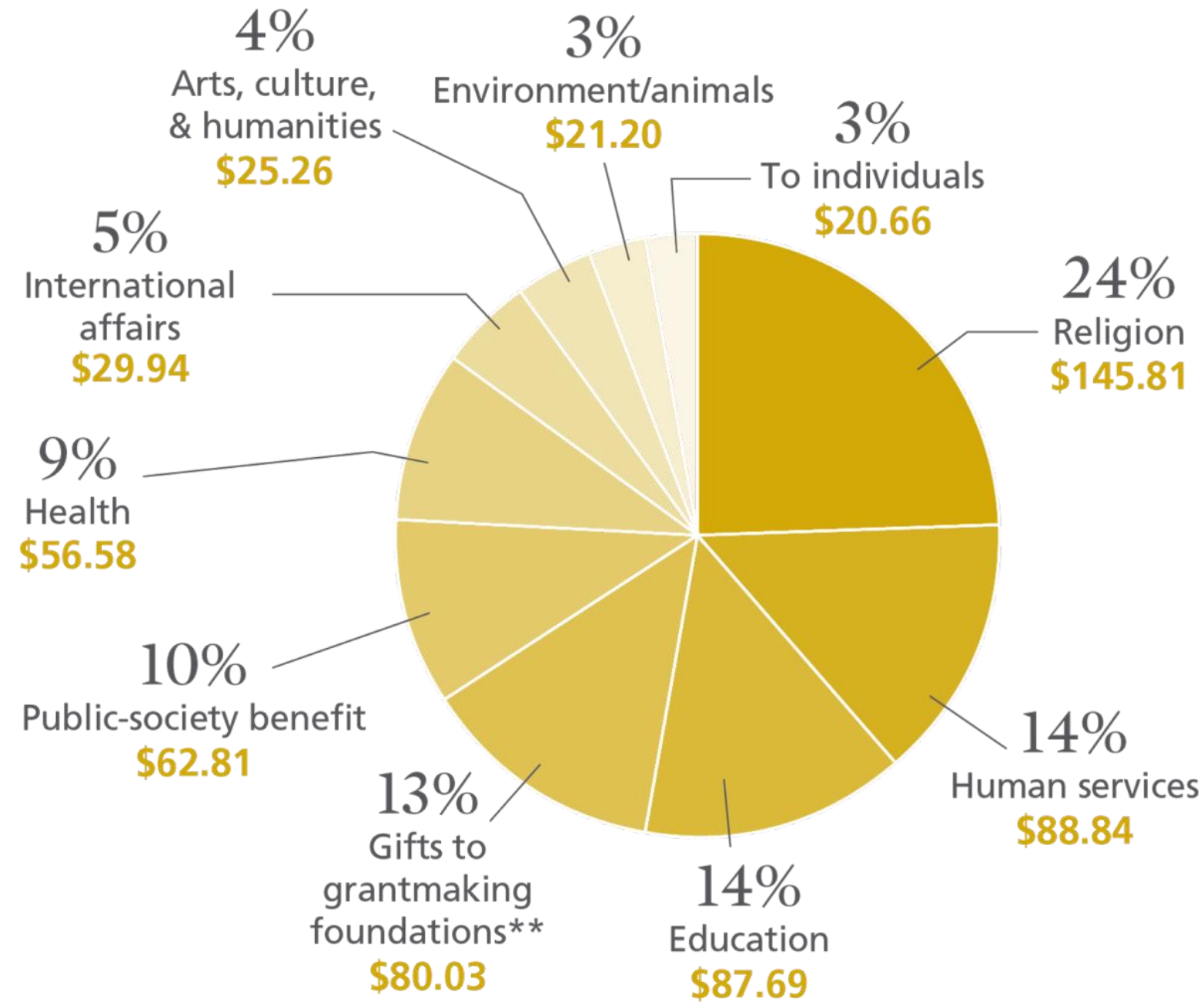


Source: GivingUSA.org



2023 contributions: \$557.16 billion by type of recipient organization*

(in billions for dollars – all figures are rounded)



* Total includes unallocated giving, defined as the difference between giving by source and recipient categories. Unallocated giving totaled -\$61.66 billion in 2023.

** Estimates developed by Indiana University Lilly Family School of Philanthropy using data provided by Candid.



Let's Talk about Events

Question for YOU?

Why we are starting here but we really don't want to.

What you will learn from this section:

1. How major money is raised from both local and other Southern California Event - Shhh, the inside secrets.
2. How to quickly gain more individual donors from your events - post event.
3. How to transition event attendees and/or event sponsors into larger donors (including but outside of your events).





LAUNA

Before you embark on another special event

- What is your goal?
- Are there other, more efficient ways to accomplish it?
- Who is your intended audience?
- How will you attract them?
- Do you have existing corporate relationships?
- Do you have enough staff to execute?
- Will you be able to have a volunteer event committee?



Are you externally ready for individual donor conversations?

Let's look up your Candid/Guidestar, Charity Navigator, CA Secretary of State, and CA Attorney General Charity Registry Tool, IRS

- <https://www.guidestar.org/search>
- <https://www.charitynavigator.org/>
- <https://bizfileonline.sos.ca.gov/search/business>
- <https://oag.ca.gov/charities> (far right side - Registry Search Tool)
- <https://www.irs.gov/charities-non-profits/tax-exempt-organization-search>



Elements of a Case for Support



A Case for Support lays out

- Who we are and why we are an essential, trusted partner
- The need/the problem
- Why we are uniquely equipped to meet this need and why this matters right now
- Our plan for addressing the problem
- What we need/how you can help

Individual Giving & Big Gifts



... how to get there

- » Individual gifts are key to building a long-term sustainable fundraising
- » Requires long-term relationship maintenance & engagement
- » Annual gift donors lead to major gifts
- » Major gift donors lead to planned gifts

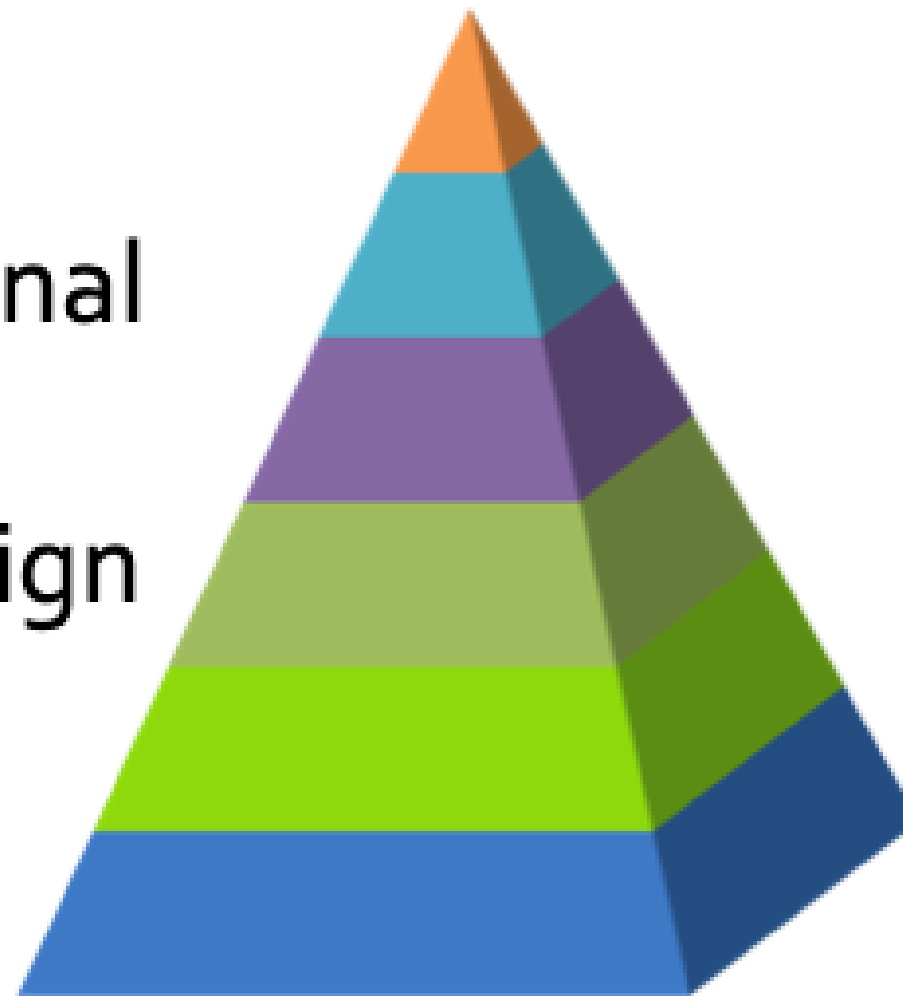


Planned Giving can lead to Major Gifts (Planned Giving type donors are sometimes your long-term annual giving supporters).

Major Gifts Fuel Our Mission

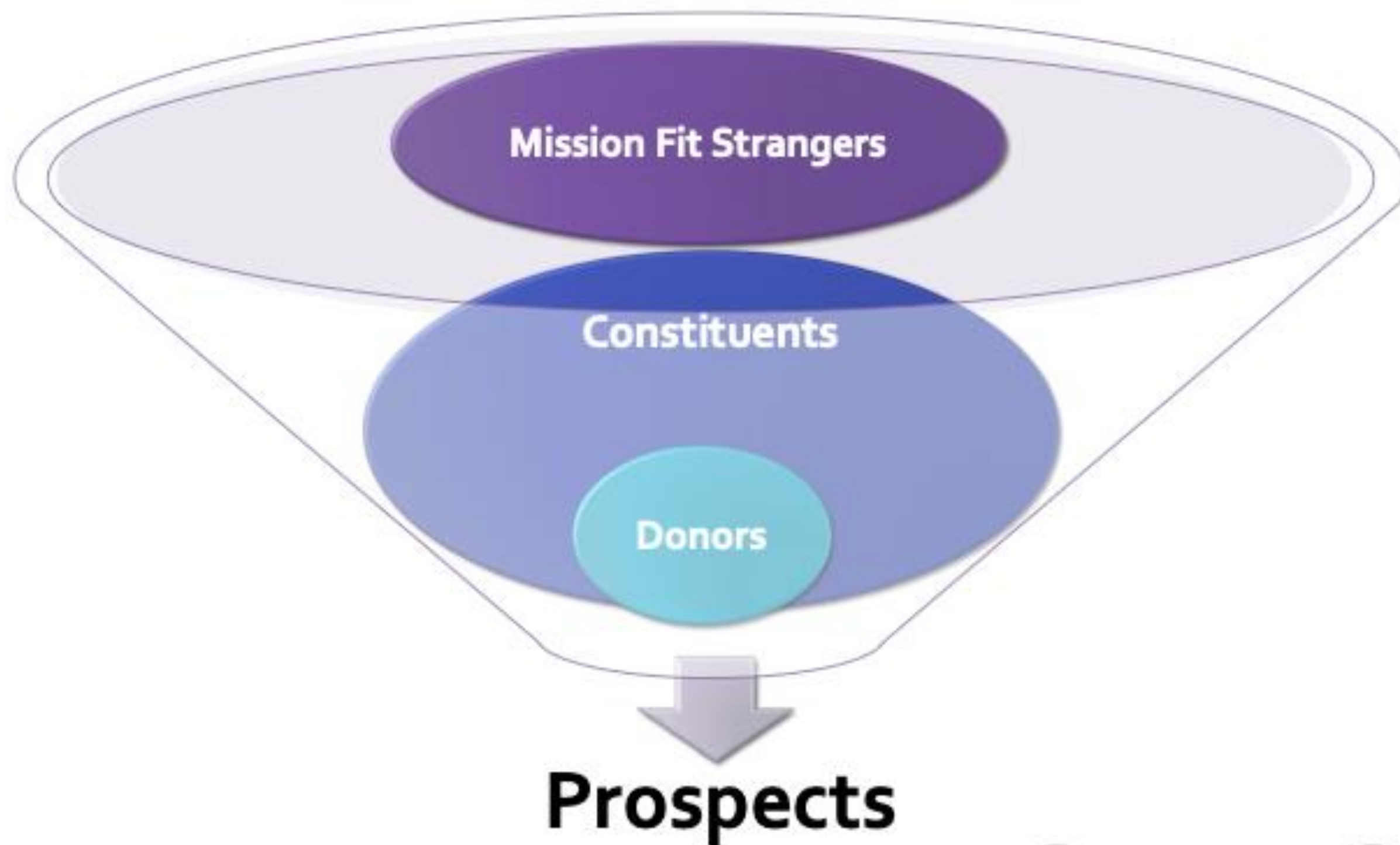
Major Gift Program

- Relies on an individual approach
- Provides transformational impact
- Indicates future campaign success
- Source of volunteer leadership
- Inspires other investment



- Transformational/Ultimate Gift Donor
- Major Donor/Planned Gift Donor
- Mid-Level/Transitional Donor
- Larger, Annual Donor
- Consistent, Modest Annual Donor
- Entry Level Donor/Prospects

Major Gift Prospecting



Tell us about your case for support...

LISA + DAN



Conversation Leaders

- ❓ Who has a case for support?
- ❓ How would an (updated) case for support help you?
- ❓ Do you have individual donors or are you primarily focused on grants and corporate sponsorships?
- ❓ Do you have a donor database, and can you run a report (or know someone that can do that for you)?

Individual Giving... let's try to convince you some more



- How individual giving helps you better serve your organization's mission
- Leveraging Volunteers, Events & Board Members (Who is already in your circle of influence?)
 - Cultivation
 - Building Long-Term Relationships of Trust
 - Trust is key to any sustainable relationship; donors and prospective donors are no exception.
- A caution against always chasing the “new”
- A bit about stewardship + utilize existing opportunities for stewardship & cultivation
- How to “find” individual donors when you do not have many individual donors



Maximize Limited Resources of Time

Use tools to help you move quickly:

- Chat GPT (app) and Gemini (Google / desktop)
- Fundraising Calendar (*This is so important!*)
- Volunteer Committees than help with fundraising

Yearly Fundraising Calendar with Activities Involved

This slide provides the glimpse about the fundraising calendar based on yearly activities, costs, staff needed, estimated income, costs, last year results, etc.

	Fundraising Activity	Costs	Staff hours/ Vol Needed	Est. Income	Est. Costs	Net Income	Results From 2022	Other Resources/Notes
Q1								
January	New Donor Survey	Staff:\$334	15/No	\$0.00	\$114.00	-\$335.00		Add Text Here
	Instagram & Facebook Contest	Prize:\$110,Staff \$336,Marketing:\$120	16/No	\$0.00	\$314.00	-\$325.00	107FB,39 Instagram	
	Add Text Here	Staff:\$149	11/No	\$2,400.00	\$140.00	\$1,452.00		
February	Major Donor Recruitment	Staff:\$500Postage:\$130 Materials:\$220Events Space of Food:\$700	30/Yes	\$12,000.00	\$1,500.00	\$9,400.00	4 Major Doners	
	Mail/Email 2022 Impact	Add Text Here	10/Yes	\$1.00	\$467.00	-\$565.00		
March	Add Text Here	Staff:\$675 Fees:\$650	50/Yes	\$24,000.00	\$1,324.00	\$35,485.00	\$17,400	
Q1 Total				\$36,020.4	\$3,859.00	\$36,050		
Q2								
April	Donor Appreciation Phone Calls	Staff:\$149	12/Yes	\$1.00	\$2,400.00	\$140.00		Add Text Here
	Add Text Here	Staff:\$87 Facebook Ads:\$120	6/Yes	\$3,000.00	\$149.00	\$160.00		
May	Recurring Giving Campaign	Staff:\$340	28/No	\$12,700.00	\$165.00	\$2,725.00		
June	Recurring Giving Direct Mail Campaign	Add Text Here	28/No	\$5,000.00	\$700.00	\$12,450.00	12Recurring Doners	
Q2 Totals				\$20,701.00	\$3,41.400	\$15,34.900	10 Recurring Doner	
Q3								
July	Pool Party Fundraiser	Staff:\$500 Space:\$1 Prizes/Games:\$149 Marketing Materials:\$149	50/yes	\$4,000.00		\$3,200.00	6300	

This graph/chart is linked to excel, and changes automatically based on data. Just left click on it and select "Edit Data".

Some Best Practices



LISA

Stewardship Matrix

- ✓ Thank yous within 48 hours

Policies

- ✓ Gift Acceptance Policy

	>\$99	\$100-\$499	\$500-\$999	\$1k-\$5k	\$5k+
Thank you email within 48 hours	✓	✓	✓	✓	✓
Personal note from board member					✓
Invitation to recognition event			✓	✓	✓
Newsletter		✓	✓	✓	✓

Table Discussion

Conversation Leaders



Have one person tell of a time they felt really thanked for their gift to an organization, how were they thanked, how soon after giving and how did it make them feel.



What happened after they were thanked (what was the organization's next step)?



Maximizing Opportunity

- Multi - Year Pledges
- Selling securities
 - QCDs / IRA gifts
- Life Insurance
 - Bequests

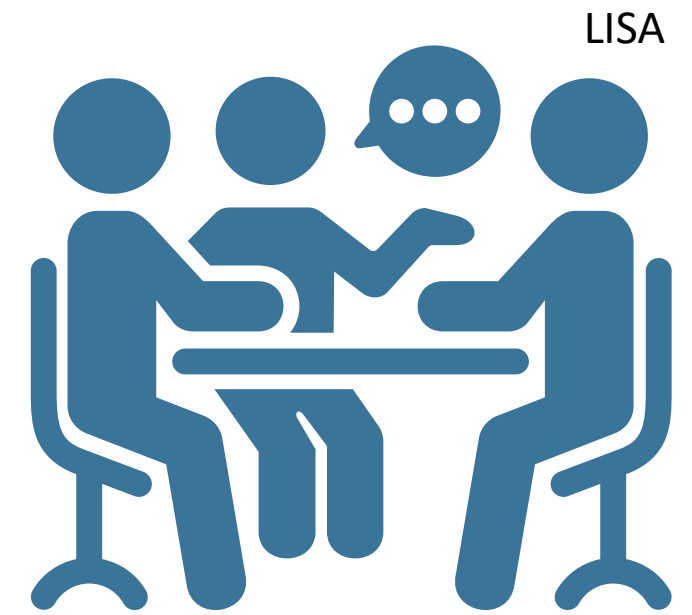
 Ideas: www.llulegacy.org



Bringing It Home

Conversation Leaders

- Circling back on handout, have your table circle items from their notes that they would like to implement at some point.
- After that, star the ones they want to implement - or create a next step - within the next 4 weeks.
- For the starred ones, please share with one another.





Bringing It Home

- Everyone is starting somewhere
- All organizations start at zero
- Events can be built into big individual gifts
- You can start tomorrow!
- Make yourself ready for donors

How will you implement one idea from today?



Do you have questions?!

We (most likely) have some answers ... or ideas for you to consider.





Thank you!

**Save the Date for the next
IE VIBRANT HEALTH FORUM**

**Bridging the Gap: Aligning
Storytelling and Advocacy
Efforts to Advance Vibrant Health**

Thursday, May 22, 2025 | 9 am - 11 am

