

# Think Beyond the Gala: Where is the Money in My Small Community?

Presented by:

Brittany Kirk, Cloudbreak Collective



It is So  
Nice to  
Meet  
You!

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cloudbreak  
COLLECTIVE

A scenic view of a small town street at sunset. The street is lined with brick buildings, many with green awnings. American flags are visible on poles. In the distance, a church with a tall steeple is visible against the sunset sky. The overall atmosphere is warm and peaceful.

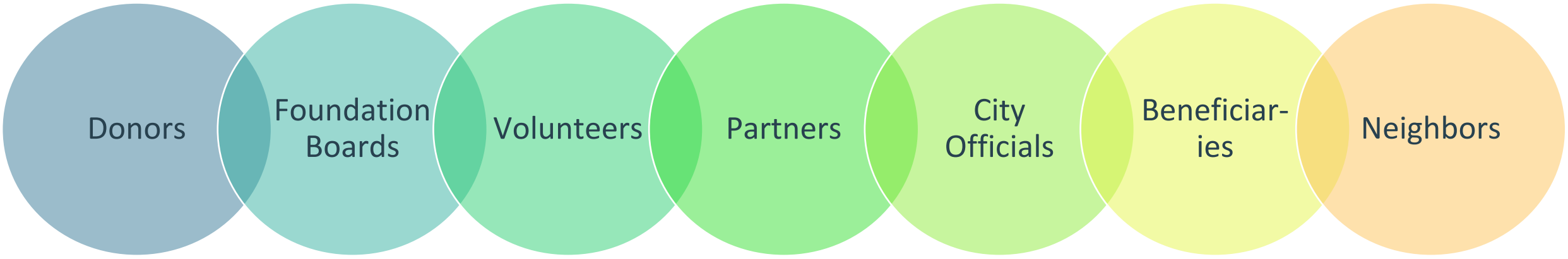
# Fundraising in Rural and Small Town Communities...



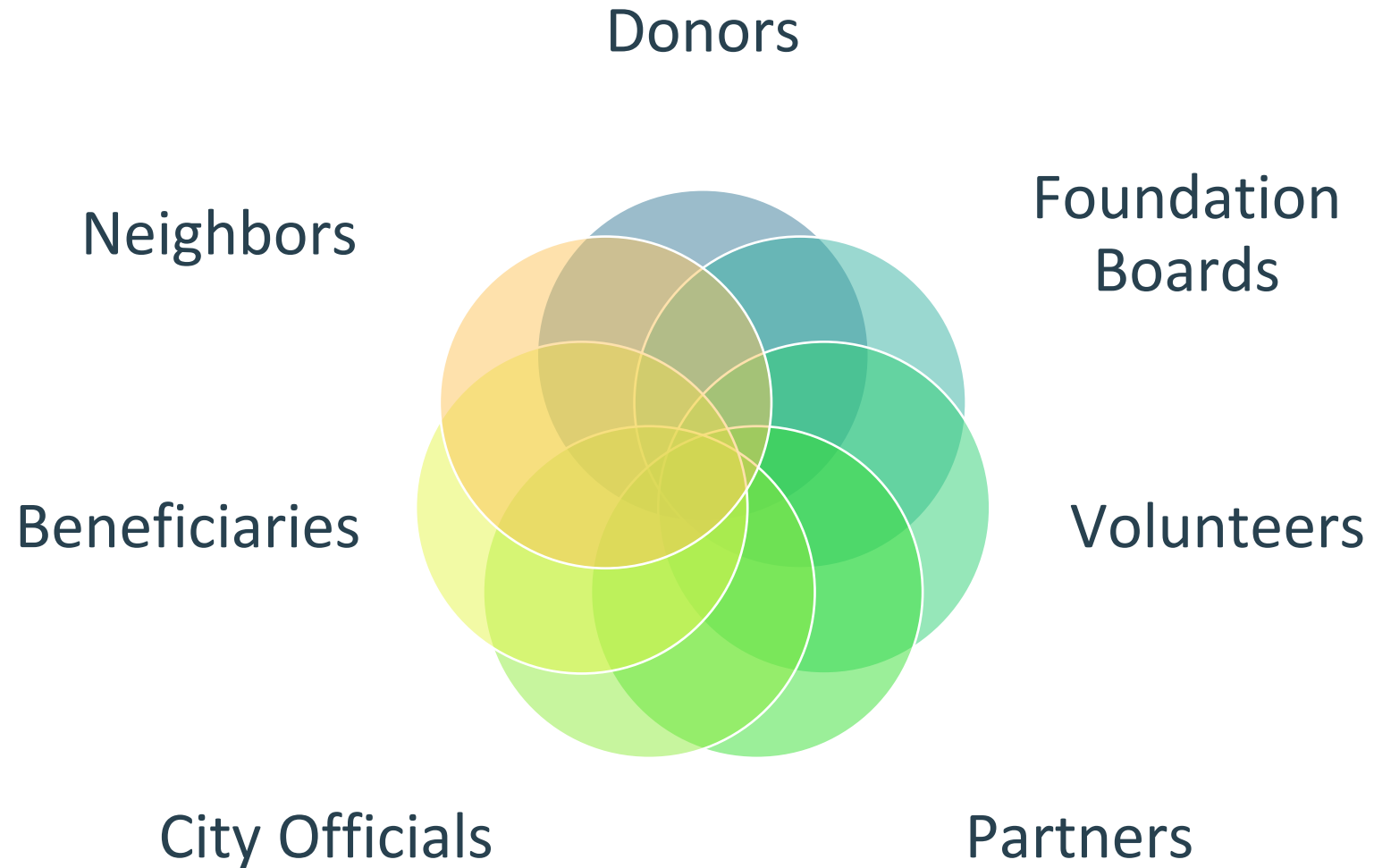
**1 in 5**  
**97%**  
**19%**



# Everyone is Connected...



... even more so in small communities





# The Usual Suspects

Can the local church / school do a drive?

Can our board call some friends with money?

I don't know where to start!

Who knows how to write a grant application?

I guess we should host an event?

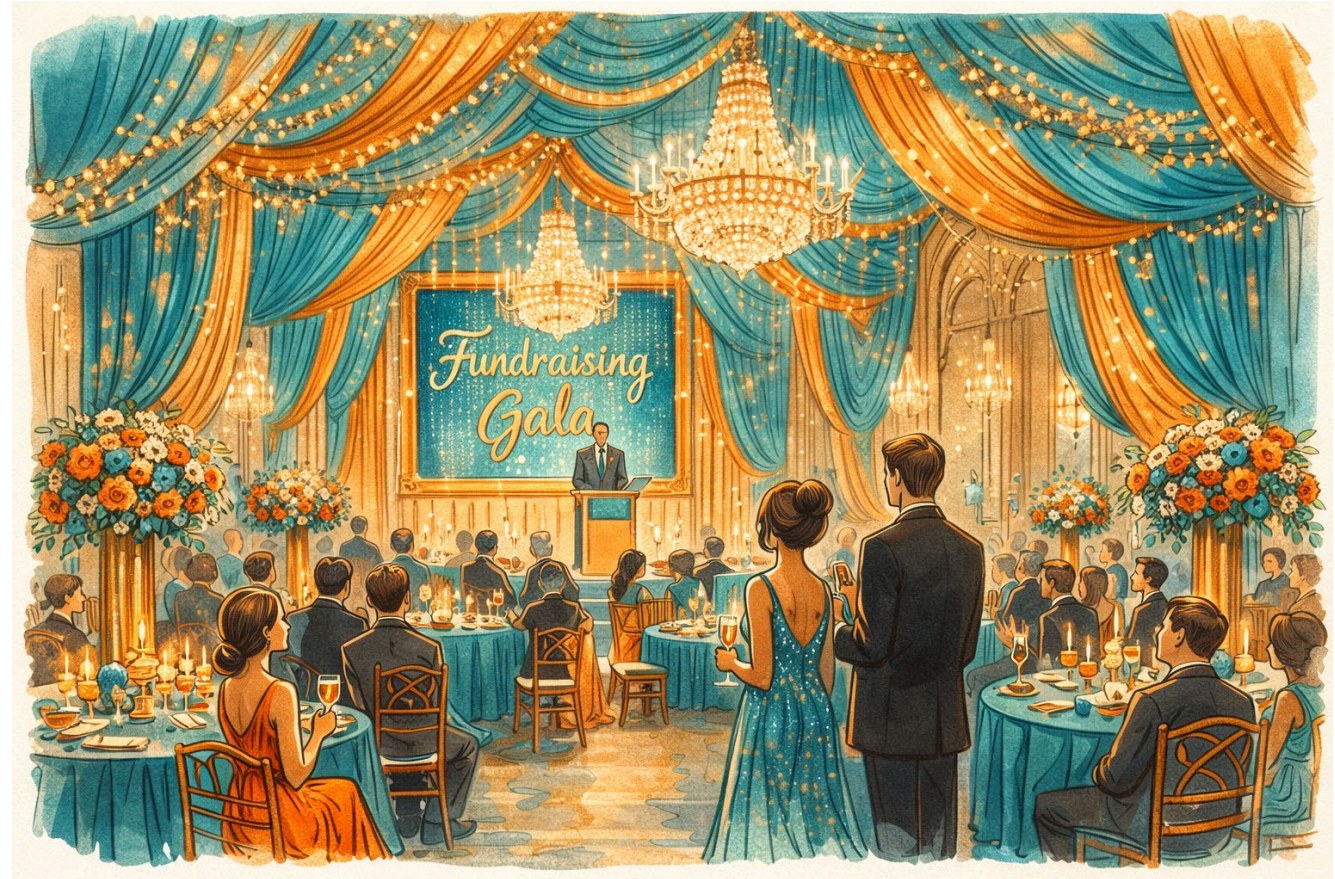
Maybe someone can call the Gates Foundation!



# The Gala (or “big event”) in Small Towns



- High financial cost
- High time cost
- Low financial return
- Changing generational giving trends
- Requires excellent post - event stewardship





# So, Where is the Money??





How do I know if someone wants  
to give to US?

# Think: ABC

A  
Access

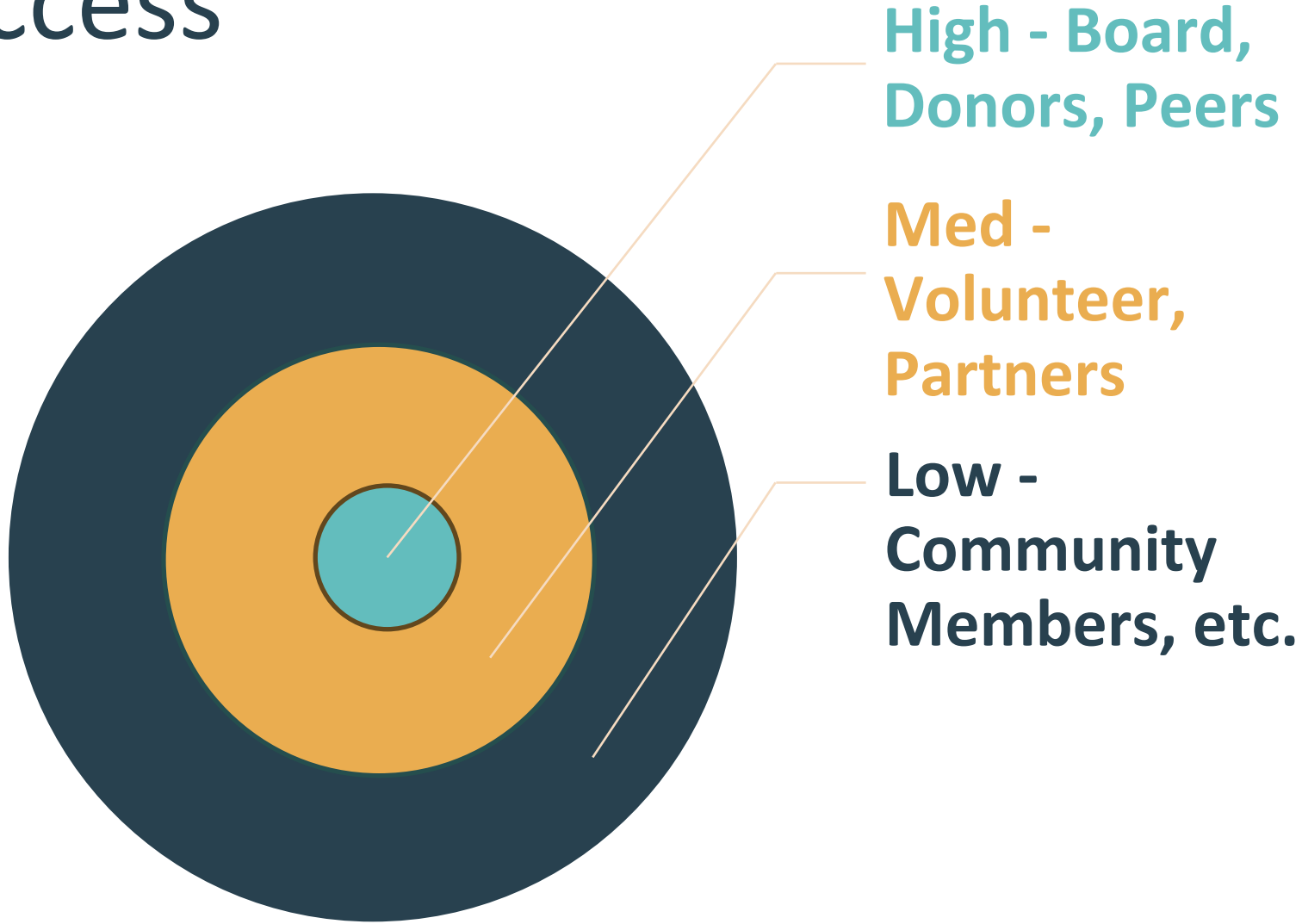
B  
Belief

C  
Capacity



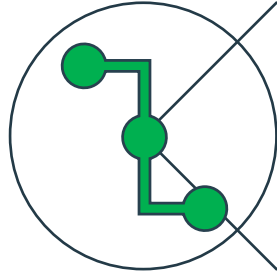


# A is for Access

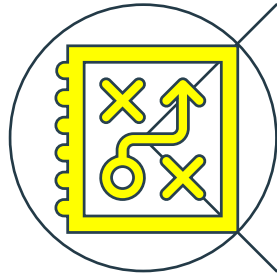




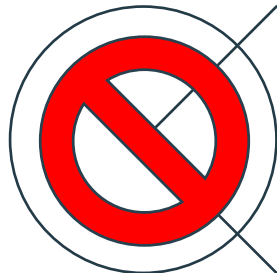
# A is for Access



DIRECT ACCESS relationship with the organization or a board member



INDIRECT ACCESS – someone in your network can introduce you.



NO ACCESS– no clear connection, requires networking

## B is for Belief

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Have they given to similar causes?

---

Do they already demonstrate belief in your cause?

---

Have they expressed public support for related issues?

# C is for Capacity

- Other annual reports
- Convo s and good notes
- Ask them
- Networks, foundations, giving circles
- [wealth screening]





# Think: ABC

A  
Access

B  
Belief

C  
Capacity



# TIPS BY CATEGORY





## Where Do I Look?

### 1. Paid Subscription Databases (or consultants)

- Candid (Foundation Directory)
- Grant Station
- Etc.
- Etc.
- Etc.
- Etc.

USE THE LIBRARY!

### Grants and Fundraising

#### Foundation Directory Online (FDO) Professional »

Foundation Directory Online (FDO) Professional is temporarily unavailable. We are working to restore service.

For fundraisers and grant writers seeking information. Research millions of nonprofit grants, grant maker, and grant recipient profiles. Find information about key decision-makers and leaders.

*Need help using FDO?*

To make an online or in-person appointment with a librarian at the Redmond Library or Federal Way Library:

Email Kirsten Erickson at [kerickson@kcls.org](mailto:kerickson@kcls.org)

Only available at F

F



#### FamilySearch

Search the Family History Library catalog as well as digitized records, which include over 2 million rolls of microform and hundreds of thousands of books and maps related to family history and genealogical research. Account registration required.



#### Flipster online magazine collection

Browse and download full-color, interactive versions of your favorite magazines. No waiting and no limit to the number of downloads you can have. Also available via app.



#### Foundation Directory Online (FDO) - Professional

Search this extensive database of nonprofit grants to locate prospective funders. Gain a deep understanding of a grantmaker's funding interests, motivations and grant sizes in order to identify the best matched funders to approach. Includes Foundation Grants to Individuals. Learn more here: [www.spl.org/nonprofits](http://www.spl.org/nonprofits)

# SPOTLIGHT ON: FOUNDATIONS



## Where Do I Look?

### 2. Comparable Organizations

- Annual Reports
- Websites
- Tax Returns
- Signs

**ACT CONTEMPORARY THEATRE** [Get Tickets](#) [On Stage](#) [Visit](#) [Support](#) [About](#) [Education & Engagement](#) [Account](#)

## THANK YOU TO OUR INSTITUTIONAL PARTNERS!

As the leading voice for contemporary theatre in the Pacific Northwest, ACT is deeply grateful for the support of our donors. Thank you to these Institutional Partners and more who power audacious theatre and bold New Works!

Join ACT in creating bold, relevant theatre while elevating your business and offering your employees and clients exclusive benefits. Our corporate sponsor tiers begin at \$5,000 and provide [unique marketing opportunities](#) that place your organization center stage.

We can find a partnership opportunity that works for you. To learn more, please email Katie McKenna, Development Officer for Institutional Partnerships, at [katie.mckenna@acttheatre.org](mailto:katie.mckenna@acttheatre.org). We look forward to working with you!

### Thank you to our current partners!

4 Culture	Dorsey & Whitney Foundation	Foundation	Giving
Adobe Systems, Inc.	Edward Jones	Merrill Lynch Wealth	The Seattle Foundation
American Endowment	Fidelity Brokerage	Management	Seattle Office of Arts & Culture
Foundation	Fidelity Charitable Gift Fund	Microsoft	Sellen Construction
American Funds	Fox Rothschild, LLP	Morgan Stanley	The Shubert Foundation
Ameriprise Financial	Frontstream	National Endowment for the Arts	Sterling Realty Organization
Ameritrade	Google	National Philanthropic Trust	Sunderland Foundation
ArtsFund	Grousemont	Nesholm Family Foundation	Thrivent Financial
ArtsWA	Hewlett Packard Enterprise	Nordstrom	TIAA CREF
Badgley Phelps Wealth	Foundation	Oppenheimer & Co., Inc.	T-Mobile
Managers	Hoffman Corporation	Patagonia	Transforming Age Foundation



## Where Do I Look?

### 3. Online Search

- Google
- AI

What do you know about the Lilly Endowment, Inc. and how to apply for funding from them? Cite your sources.

Lilly Endowment Inc. is a private philanthropic foundation based in Indianapolis, Indiana. Established in 1937 by J.K. Lilly Sr. and his sons, Eli and J.K. Jr., through gifts of stock in Eli Lilly and Company, the Endowment operates independently from the pharmaceutical company, with its own board, staff, and mission . [Wikipedia +2](#) [The NewsMarket +12](#)

#### Mission and Focus Areas

The Endowment's grantmaking centers on three primary areas: [Lilly Endowment +4](#)

- **Community Development:** Supporting initiatives that enhance the quality of life in Indianapolis and Indiana, as well as compelling causes nationwide that align with the



## Where Do I Look?

4. Newsletters
5. Social Media
6. Friends
7. Your Donor Base!





Not Every **GRANT**  
Opportunity is  
Right for You

# SPOTLIGHT ON: FOUNDATIONS



## Clues



**A** is for  
Access

- Where are they?
- Where have they given?
- Familiar Names
- Contact Info

**B** is for  
Belief

- What do they say they care about?
- What do they show they care about?

**C** is for  
Capacity

- Assets
- Giving Total

# SPOTLIGHT ON: FOUNDATIONS



When in doubt, reach out!

- Is this something your board would consider funding?
- Which of these projects is more interesting to you?
- What should I emphasize or be sure to mention in my application?

# SPOTLIGHT ON: GOVERNMENT AGENCIES

## In 2026:

- Know the odds are more against you than usual.
- Evaluate EXTRA carefully.
- Do not chase money.
- If you apply, be laser - focused on their goals.
- Relationships (always!) matter.



# SPOTLIGHT ON: COMMUNITY GROUPS

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- Tribes
  - Religious organizations
  - Service groups
  - Youth groups
  - Giving circles
  - Schools





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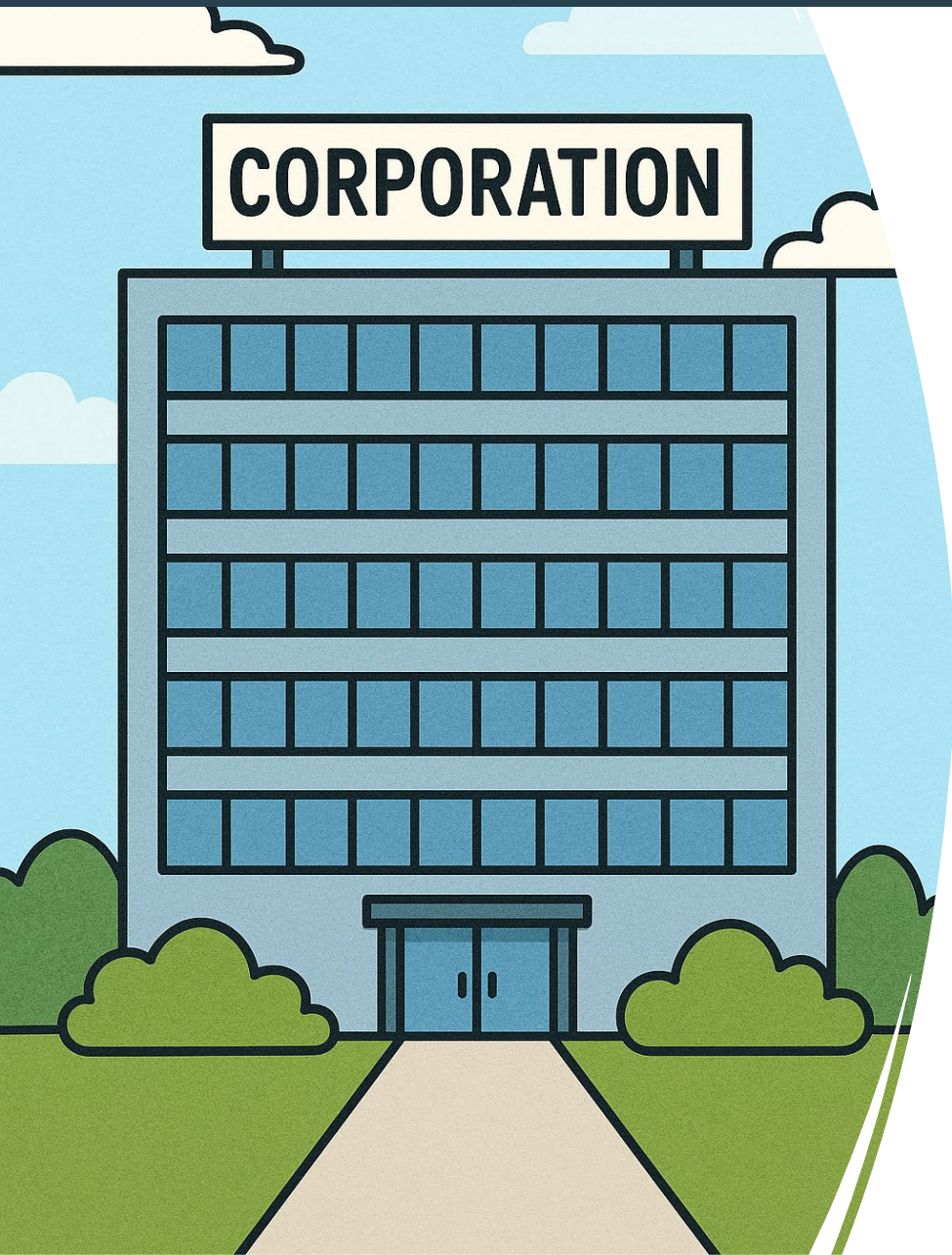
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## Why Do Corporations (and Small Businesses) Give?

- Brand reputation
- Advertising
- Employee retention and satisfaction
- To enter new markets
- Generosity?

# SPOTLIGHT ON: CORPORATIONS



## Ways Businesses Partner with Nonprofits

- Corporate Grants
- Marketing Budgets / Sponsorships
- Volunteers
- In- Kind Gifts
- Employee Designated Gifts
- Matching Gifts

# Want More on Grants?

Session 3 –  
Future Proof  
Your Grants  
Program  
1:30pm





It is **FAR** easier to  
retain or reengage  
than acquire!

# SPOTLIGHT ON: INDIVIDUAL DONORS

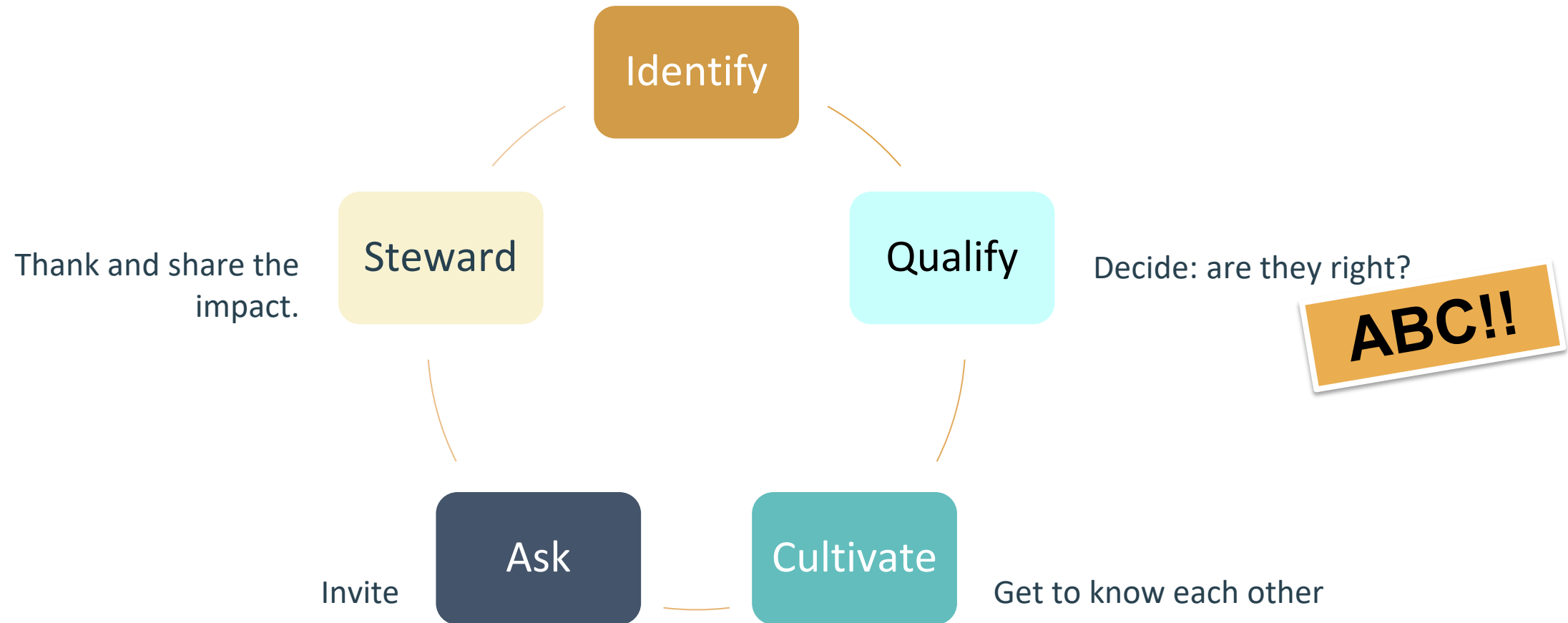
- Current Donors
- Lapsed Donors
- **New Donors**
  - People who talk publicly about your cause
  - People who give to other similar causes
  - People who have benefited

**ABC!!**





## The Donor Cycle





**Learn about them.**  
**Teach them about us.**



## Moves Management

Month	Move	Lead Person
Jan	Invite to Tour	ED
Feb		
Mar	Coffee Date	ED
Apr	Event Invite	Board Member
May		
Jun	Email Update	ED
Jul		
Aug	Send Annual Report	Staff
Sept		
Oct	Ask Meeting	ED
Nov	Thank You Letter	Board Member
Dec	End of Year Email	Staff

## Create a Moves Menu

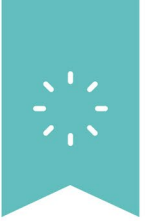




Step Thru



If *you do not ask*, they most likely will not give.



They should already know a  
lot about you, and you about  
them!



## Moves Management

Month	Move	Lead Person
Jan	Invite to Tour	ED
Feb		
Mar	Coffee Date	ED
Apr	Event Invite	Board Member
May		
Jun	Email Update	ED
Jul		
Aug	Send Annual Report	Staff
Sept		
Oct	Ask Meeting	ED
Nov	Thank You Letter	Board Member
Dec	End of Year Email	Staff

# SPOTLIGHT ON: INDIVIDUAL DONORS



You are ready to  
**ASK** if you know:

Why they got involved  
or made their first gift?

Why they care?

Why would they give or  
give you more?

# SPOTLIGHT ON: INDIVIDUAL DONORS

## 6 Tips when making “the ask”


1. **Practice** . Write a script beforehand and practice it.
2. **Lead with Impact.** Focus on how their donation will make a difference for your community, not you as an organization.
3. **Be Direct and Specific.** Make sure they know you are asking them for a gift, and name an amount. If you are stuck, try language like this, “would you consider a gift of \$X this month?”
4. **Stop Talking.** When you are done, be quiet and let them respond.
5. **Make it easy.** If they want to give, remove logistical barriers. Create a card with a QR code to your donation page, have donation forms handy, etc.
6. **Create a reason to follow up.** Don’t leave the conversation without a reason to follow up. For example, “It was great to talk to you – I will email you later this week with that article I mentioned!”



What is the deal with  
**DAFs?**

# SPOTLIGHT ON: Donor-Advised-Funds



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LEADERSHIP > LEADERSHIP STRATEGIES

## Will 2024 Be The Year Of The DAF?

By [David Hessekiel](#), Contributor. 

[Follow Author](#)

Jun 12, 2024, 08:21am EDT

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Created in the 1930's, donor-advised funds (DAFs) are not new, but their growth in the last 30 years has been tremendous. [The most recent tally by the National Philanthropic Trust](#) estimated that \$229 billion resided in just under 2 million accounts in 2022.

DAFs enable donors to make a charitable contribution yielding an immediate tax deduction, but to make grants from the fund over time. DAF distributions topped \$52 billion in 2022, according NPT figures.



## What is a DAF?

- A charitable investment account that allows donors to contribute money and recommend grants to eligible charities.
- DAFs are managed by a public charity, called a sponsoring organization.



## Types of DAF Providers

- Community Foundations
- National For - Profit DAF Providers (Fidelity, Schwab, etc.)
- Religiously Affiliated
- Special interest groups

**DAF donors are probably people already in your database (or community).**

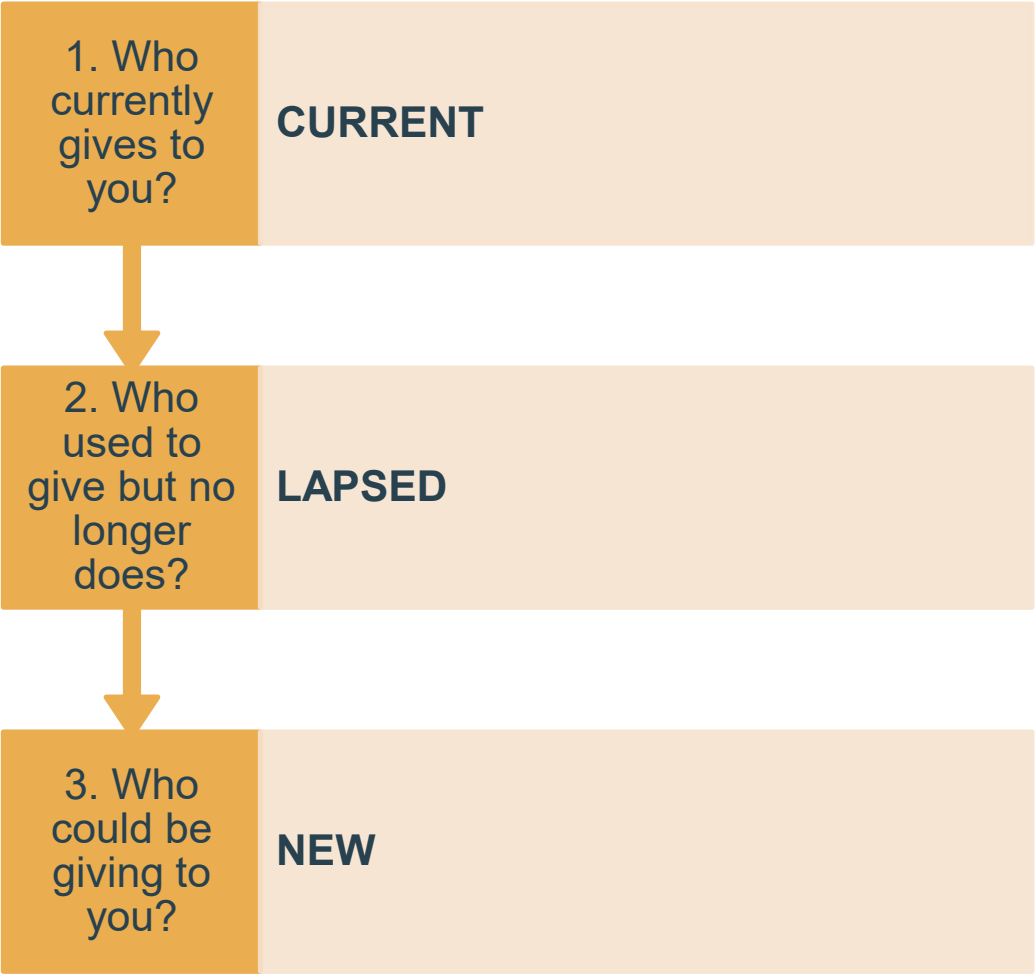


## How do DAFs Work?

- **Contribute:** Donors contribute cash, securities, or other assets to the DAF.
- **Take a tax deduction:** Donors can take a tax deduction for their contributions in the year of the donation.
- **Invest:** The funds are invested for tax-free growth.
- **Recommend grants:** Donors recommend grants to eligible charities.

Give, Grow, and Grant

# Your Homework





# Questions?

[Brittany@cloudbreakcollective.com](mailto:Brittany@cloudbreakcollective.com)



# Sample Ask

Thank /  
Warm Intro

Need

Impact

Specific Ask

Gratitude

**Thank you** for your incredible support of our community (through event attendance, sharing our posts, volunteering, etc.) —your generosity makes a real difference.

Right now, **the need** for food assistance is higher than ever, and our food bank is working hard to ensure no family goes hungry.

With **a gift of \$5,000** this year, you can help provide 20,000 nutritious meals to those in need.

**Would you consider** making this impact today?

We'd love to **recognize** your generosity and show you firsthand the lives you'll be changing."

