

Liaison Fundraising Guide

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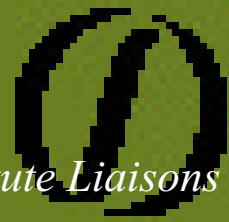
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Introduction to Fundraising

A brief description of the Fundraising process for ADHA Institute Liaisons



The three identifiable roles of the Institute Liaison are: 1) to solicit donations, 2) to expand and reinforce name recognition of the Institute, 3) and to recognize donors for their contributions. Because of the length of this article, each topic will be described only briefly. For further information and ideas, please contact the Executive Administrator of the Institute at (800) 243-ADHA.

The fundraising aspect of the Liaison position also takes on three different roles: **individual solicitation, Component solicitation, and Constituent solicitation.** Because the main responsibility of the Liaison is to raise funds for Institute programs, she or he must be able to identify the persons or groups to be solicited. Automatically, all ADHA members and Constituent and Component organizations should be solicited. However, it is the task of the Liaison to decide which members and organizations to solicit individually.

The typical methods of solicitation for individuals are by letter, phone, or meeting. Each method provides a different level of personalization, and can be tailored to the individual. Generally, a Liaison will group her or his fundraising prospects in this order: 1. **Will receive a letter** - Individuals who are likely to donate a small amount (\$25-75) and require little personal attention; 2. **Will receive a phone call** - Individuals who are likely to donate a larger amount (\$75-250) and should get more personal attention; and 3. **Will meet personally** - Individuals who are likely to donate a large amount (\$250+) and should receive the most personal attention.

The past giving history of donors will provide a hint into which category an individual will fall. Also, all Constituent and Component Board members should receive either a phone call or personal visit.

The concepts to stress in these solicitations should be: 1. The ADHA Institute is a non-profit organization dedicated to advancing and improving the dental hygiene profession; 2. Donations are tax-deductible; and 3. Research Grant and Scholarship recipients that are from the area. (*Consult page 6 of this guide for examples of publications to distribute to potential donors.*)

When soliciting a prospective donor one-on-one, it would be helpful to have a monetary amount in mind. Utilize the donor's past giving history or an average of what other donors are currently giving. By suggesting an amount, you enable the donor to picture something that is concrete rather than an abstract donation which they may or may not make.



One final suggestion for individual solicitation is to begin by setting goals. ("I will obtain 25 new donors, and increase total individual giving by \$2,000.") If the Liaison has fundraising goals set, it enables

her or him to more easily decide who to solicit and how to accomplish it. Further, it provides the Liaison with another incentive for donors: "Please help us to meet our goal for this year."

Constituent and Component solicitation is much different from that of individuals. To effectively solicit organizations such as these, begin with a solid proposal such as that found on page 5: to challenge the organization to donate \$1.00 per member. Present to the Constituent/Component Board of Trustees members the mission of the Institute and its effects upon the profession. After you have shown why the Institute is important to them, propose the fundraising strategy. Encourage the organization

to add the Institute as a line item in its annual budget, and to consider an annual donation. Provide examples of other constituent or component organizations who have donated as well as their reasons for donating. Ultimately, a Liaison's goal is to have every dental hygiene organization in her or his state donate to the Institute.

Name Recognition

A function of the In hand with fundraising is ensuring that all members recognize the name and purpose of the Institute. Presentations at constituent and component meetings as well as fundraising letters help to advance this process. So, however, do Liaison-sponsored events (pages 4-5).

Whenever a company or organization wants a product or service to be well known, they advertise. As a volunteer fundraiser, Liaisons are also responsible for creating and promoting public awareness of the Institute. Promote the Institute by setting up an informational booth at each meeting you attend. Further, use the Institute publications as handouts and advertisements.

To help the Liaison add this personal touch, the Institute has designed and distributed official "Thank You" cards. These cards are to be signed by the Liaison and sent to Institute donors as the second level of the recognition process. For donors who either require or deserve special consideration, such as a large gift donor, further personalization of the thank you card or a phone call are logical next steps.

The key to proper donor recognition is to find out why an individual gave and then to thank her or him in a manner that reflects that reason. Thus, if a person gives to the scholarship fund because she or he believes in education, enclosing both an edition of the *Benefactor* newsletter and a listing of the scholarship recipients in her or his region with a personal recognition letter can go a long way toward getting the person to repeat as a donor and even increase her or his gift.

Further more, by coming to understand why certain individuals donate to the Institute, a you will also learn how to better solicit future donors.

The three identifiable roles of the Institute Liaison are as follows: to solicit donations, to expand and reinforce name recognition of the Institute, and to recognize donors for their contributions.

Because individuals who recognize the name and purpose of the Institute are also much more likely to donate, name recognition is an important responsibility of the Liaison, and one which makes fundraising much easier.

Recognize Donors

Following name recognition and solicitation, the most important way to retain donors is to make sure that they are recognized for their contribution. The saying "A happy donor is a thanked donor" is particularly relevant. All donors, and particularly those at the higher giving levels, should be thanked both by the Liaison and the Institute.

Staff members of the ADHA Institute automatically send out a confirmation and thank you letter for gifts that are received throughout the year. Because of the total amount of gifts, each letter cannot be fully personalized. Thus, the job of thanking donors in a more personal way becomes that of the Liaison.

The ADHA Institute for Oral Health is one of the only organizations dedicated to improving the dental hygiene profession, and is one of the only sources for scholarships and research support for students and practicing dental hygienists. The role of the Institute Liaison is very important to the success of the organization, and is relied upon to aid Institute staff in solicitation, name recognition, and the thanking of donors.

As the Institute grows, and donations to its funds increase, the Liaison will assume an even more vital role in helping to manage a donor base of thousands of dental hygienists. The future for the Institute is bright, for it is lighted by the fundraising efforts of a set of very important volunteers: the Institute Liaisons.



Suggested Fundraising Activities

Listing of potential Liaison fundraising events and solicitation ideas

Events suggested by current Liaisons

Raffle or Silent/Live Auction - Used by many Liaisons, a raffle or silent/live auction is an easy and quick way to raise a considerable amount of money. Held at constituent annual sessions or component meetings, raffles and auctions provide Liaisons with a solicitation approach that doesn't sound like "fundraising." By asking members to donate an item rather than money, you increase your chances of securing a donation. Further, people are often more willing to bid on an item or purchase a raffle ticket than to sign a check for a donation.

50/50 Drawing - The fundraising event which requires perhaps the least preparation and time is the 50/50 drawing. The drawing may be held at any dental hygiene event which you attend, and requires only tickets or small slips of paper and a container from which to draw. Tickets may be purchased for a set amount, such as \$1.00. When the pot of money reaches the desired amount, a ticket is drawn, and the money is split between the winner and the Institute.

Dinner Reception - A mini-gala, cocktail reception, dessert event, and continental breakfast are all events which have been held by Liaisons to raise awareness of the Institute while gaining donations. By charging for tickets to the event and personally soliciting attendees, a Liaison can raise thousands of dollars while spreading the name and mission of the Institute.

ADHA Marketplace - Convince your constituent organization to organize a booth for the Annual Session Marketplace and to donate a percentage of its profit to the Institute. Or, organize a Marketplace event for your constituent annual session.

Business Luncheon - In much the same vein as the Dinner Reception, you can organize a business luncheon that involves a speaker and door prizes. By having the speaker pick from topics relevant to the dental hygiene profession, such as how to improve profit in your office or how to start your own business, you can create an educational event that hygienists will want to attend. And, by charging for tickets, you can raise funds for the Institute at the same time.

Additional Event Details

Examples of items donated for raffles and silent/live auctions include: jewelry, wreaths, baskets, wine, trips or vacations, quilts, christmas decorations, dental supplies, electronic items, and tickets to shows or theme parks. Theme raffles and auctions (such as Christmas or Spring) are wonderful ideas that may help to increase donor participation.

Just remember to bring your own hat or box and tickets. Often these can be hard items to find on the spur of the moment.

If your Constituent's Annual Session schedule permits, holding an event of this nature can be both fun and profitable.

Items that have been sold include: mouse pads, pins, books, t-shirts, member directory, calendars, Christmas ornaments, etc.

Could be held at Constituent Annual Session or any large component meeting. The event is both social and educational in nature, and provides attendees with the opportunity to network as well.

Events continued...

3K or 5K Run/Walk - Much like the event held during ADHA's Annual Session, a 3K or 5K Run/Walk can be held at an area park during your constituent annual session. The event costs relatively little, and you can charge a participation or entry fee on behalf of the Institute. Selling t-shirts or refreshments is another way to increase your fundraising.

Fashion Show or Mystery Dinner - Entertainment events such as a fashion show or mystery dinner are easy to organize and very profitable. You can partner with community and high school theaters to "set the stage" for a mystery or dinner theater performance. And, many local businesses would love the chance to display their products to a captive audience during a fashion show.

Pass the Hat - A very unoriginal but functional idea, passing a collection hat during a presentation on the purpose of the Institute can raise a significant amount of money.

Caricature Drawings - An inexpensive and highly entertaining way to raise money during a constituent or component meeting is to hire a caricature artist. By reserving a booth for the Institute at this meeting and charging members for having their pictures drawn, you can draw your own path to fundraising success.

Garden Party - An event to be held during late Spring, a garden party at your local botanical garden or park can be a relaxing and fruitful experience. A light lunch preceded or followed by wine and cheese tasting can be served to guests as they sit on blankets in the grass or on patio furniture. Of course, much of the cost of tickets to this event will directly benefit the Institute.

"Guess the Number" - Like a raffle, you can offer chances to members to "guess the number" of items in a glass container. Can be candy or even dental products such as floss or prophylaxis angles.

Component, Constituent, & Member Fundraising Strategies

- Challenge constituent and component organizations to donate \$1.00 per member to the Institute
- Challenge members to donate at least one hour's salary to the Institute
- Petition constituent and component organizations to include the Institute as a line item in their annual budgets
- Ask your constituent organization to donate a percentage of its profit from C.E. classes

For more information on these suggested events and fundraising strategies, please contact the Executive Administrator of the Institute at (800) 243-ADHA.



Materials Available Upon Request

Materials produced by the IOH for Liaison use in Fundraising

Website - The Institute website, located at www.adha.org/institute, is a perfect resource for explaining the purpose of the Institute to potential donors. It includes scholarship and grant application downloads and a secure online donation form.

Annual Report - The IOH annual report contains the annual financial information for the Institute, such as amount of donations. It also includes a Donor Honor Roll and listing of Scholarship and Research Grant recipients.

Liaison Business Cards - Available to all Liaisons are 2-color business cards with personal information on the front and a fundraising message on the back. These can act as a personal solicitation every time they are handed out.

Benefactor Newsletter - This semi-annual donor newsletter is designed to provide supporters of the Institute with personal examples of how their contributions are affecting the dental hygiene community.

Informational Brochure - A three-paned informational brochure, its purpose is to briefly describe the mission of the Institute for Oral Health to those who have little or no understanding of the organization.

Liaison Newsletter - A “quarterly publication for the grass roots fundraiser,” the Liaison Newsletter provides Liaisons with timely information on the status of the Institute and tips for successful fundraising.

History Booklet - The booklet is a 13-page publication designed to provide a history of the Institute and its programs to beginning Liaisons.

Research Program Fact Sheet - The two page fact sheet provides an overview of the IOH Research Grant Program for members interested in making a contribution.

Gifts by State - Liaisons are provided with semi-annual listings of contributions and donors in their state.



Example Yearly Calendar of Liaison Events & Mailings

Fall

- **Constituent Annual Session**
Hold Silent Auction during all of 1st day
Petition to have Institute included as a line item in Constituent budget
Set up IOH booth beside registration
Make presentation on Institute
Solicit individuals for donations
- Receive *Liaison* Newsletter
- Call, e-mail, or write ## members to solicit for Institute
- Receive report on giving, send thank you notes to donors

Winter

- **Component Meeting**
Hold raffle for quilt donated by member
- Receive *Liaison* Newsletter
- **Component Meeting**
Hold 50/50 drawing
- Receive *Benefactor* Newsletter
- ADHA IOH sends out 1st appeal for the new fiscal year

Spring

- **Constituent Board Meeting**
Attend meeting to make presentation on Institute and solicit Board members
- **Component Meeting**
Make presentation on Institute and pass the hat for donations
- Receive *Liaison* Newsletter

- Receive report on giving, send thank you notes to donors
- Call, e-mail, or write ## members to solicit for Institute

Summer

- Receive *Benefactor* Newsletter
- **Component Meeting**
Hold 3-5K Walk/Run
- **ADHA Annual Session**
Attend Liaison Breakfast
Attend IOH Gala
Help Constituent with Marketplace booth
- Call, e-mail, or write ## members to solicit for Institute
- Receive *Liaison* Newsletter

Annual Goals

1. To ensure that constituent and all component organizations give to Institute.
2. To increase the number of individuals giving and total gift amount by 10%.
3. To attend 75% of constituent and component meetings.
4. To hold at least 2 fundraising events, one during constituent annual session.
5. Write thank you notes to all new donors and to all repeat donors above \$20.
6. Make personal donation to the Institute to show support.

Mission Statement

To encourage and promote professional excellence through scholarship and quality research in collaboration with the American Dental Hygienists' Association.

Vision Statement

Leading the way through professional excellence in dental hygiene education and research.

Values Statement

We treat our donors, employees, and recipients with respect, dignity, honesty, and compassion.

We value new ideas, innovations and a positive response to change.

As good stewards of the resources entrusted to us, we value integrity and observe the highest ethical standards and obey all laws and regulations governing a not-for-profit organization.

We are committed to dental hygiene education, research, and professional excellence and the highest standard of quality in administering our activities.

We understand that the success of our organization relies upon the building and maintenance of effective teams. We value collaboration and innovation.

We will manage our resources to preserve the future of dental hygiene education and research.

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