MONEY IS THE ROOT OF ALL EVIL

In for a dime, in for a dollar

Money makes the world go round

A fool and his money are soon parted

Money doesn’t grow on trees

I want money, that’s what I want

Money is the mother’s milk of politics
Strategic Fundraising

Fundraising Strategy Session
NJNJN Conference
July 25, 2016

Beth Grupp
President
Beth Grupp Associates
Fundraising Strategy

1. WHAT are we doing - **Impact and Program**
2. WHERE are we going – **Goals**
3. WHO are we asking – **Target Donors**
4. WHY will donors give – **Message**
5. HOW will we ask – **Fundraising Tools**
6. WHO will ask – **Messenger**
7. HOW will this get done – **Infrastructure**
8. WHEN will it happen - **Time Line & Action Items**
CURRENT STATE OF GIVING
Percentage of US Households Giving Philanthropically 2016
Average Household Contribution:

Average Household Contribution in 2016: $2,240

- Give 94%
- Non Give 6%

Source: Giving USA 2017
Giving in 2016: $390.05 Billion
(8.1% increase from 2014; 2.7% increase from 2015)

- Individuals: 72%
- Corps: 5%
- Bequests: 8%
- Foundations: 15%

Source: Giving USA 2017
Giving in 2016: $390.05 Billion

- Individual: $280.8 Billion
- Foundation: $58.5 Billion
- Bequest: $31.2 Billion
- Corporation: $19.5 Billion

Source: Giving USA 2017
2016: Breakdown by Recipient
(#s in Billions of Dollars)

- Religion: $124.82
- Education: $58.51
- Human Services: $46.81
- Gifts to Foundations: $39.00
- Health: $31.20
- Public-Society Benefit: $31.20
- International Affairs: $23.40
- Arts, Culture, and Humanities: $19.50
- Environment/Animals: $11.70
- To Individuals: $7.80

Source: Giving USA 2017
Percentage of Discretionary Income Given to Charity

$50,000 – 75,000: 7.6%

$100,000–199,000: 4.2%

$200,000+: 4.2%

Source: Chronicle of Philanthropy, August, 2012
Percentage of Discretionary Income Given to Charity

- White: 6.4%
- African Amer.: 8.6%
- Hispanic: 5.7%
- Asian: 3.9%
- All: 6.4%

Source: Bureau of Labor Statistics; Chronicle of Philanthropy, May 1, 2003
Fundraising MYTHS
Fundraising Myths

It is easier to do low-dollar fundraising than high-dollar fundraising.
Fundraising Myths

It is easier to do low-dollar fundraising than high-dollar fundraising

Fundraising is hard because there is fierce competition for limited dollars
Fundraising Myths

Fundraising is hard because there is fierce competition for limited dollars

Only the rich give
Fundraising Myths

Only the rich give

Good fundraising is good schmoozing
Fundraising Myths

Good fundraising is good schmoozing

Good fundraising is good arm-twisting
Fundraising Myths

Good fundraising is good arm-twisting

All we need is a story in the New York Times
Fundraising Myths

All we need is a story in the New York Times

All we need is Oprah
Fundraising Myths

All we need is Oprah

Once someone has given, it's rude to ask for more
Fundraising Myths

Once someone has given, it's rude to ask for more

People will give if the cause is worthy enough
Fundraising Myths

People will give if the cause is worthy enough

People are motivated by charity and altruism
Donor Self-Interest

“What’s in it for me?”
Donor Self-Interest

WHAT’S IN IT FOR ME?

Individual Donor

Work
Friends
Community
Family
Attitude
Values
Identity
Donor Mapping

Based on a model Developed by Dee Ertukel
Fundraising Attitudes

“A Fool and His Money are Soon Parted”

“Money makes the World go Round”

“Money is the root of all Evil”
Growing Your Donor Base
“I can’t raise money. I don’t know any rich people!”
Growing Your Donor Base
Strategy #1: Connectors
## Networking from the Core

<table>
<thead>
<tr>
<th>People in Your Circle</th>
<th>Prospects</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jane Smith - Board Member</td>
<td>Ima Riche</td>
</tr>
<tr>
<td>Susan Chu - Donor</td>
<td>Sharm I. Windfall</td>
</tr>
<tr>
<td>Maria Estevio - E.D. of allied org.</td>
<td>Spend Now Fund</td>
</tr>
<tr>
<td>Milton Johnson - Investor</td>
<td>Hava Centavos</td>
</tr>
</tbody>
</table>
Connectors Model

- Highly regarded
- Credible
- Well-networked
- Visible
- Trusted
- Have a reason to want to help you
- Will return your phone call
## Matching Connectors with Prospects

<table>
<thead>
<tr>
<th>Connectors</th>
<th>Prospects</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jane Smith - Board Member</td>
<td>B.A. Goodfellow</td>
</tr>
<tr>
<td>Adam Gomper – Celebrity</td>
<td>Mayda Goldbricks</td>
</tr>
<tr>
<td>Maria Estevio – Member of Congress</td>
<td>Charity Allday</td>
</tr>
<tr>
<td>Milton Johnson – Donor</td>
<td>Bea Queath</td>
</tr>
</tbody>
</table>
Scenario: Call Time

You are the Executive Director of a small non-profit and have recently decided to get out of the hand-to-mouth cycle and put time and energy into increasing your donor base.

Your Board Chair, Anita Brake, has collected the names of 50 wealthy individuals and foundations. She feels strongly that the next step should be for you to cold call through the list to see if anyone will give you funding.

Is this a good use of your time? What do you do?
Scenario: Connectors

Your friend, Lotta Eego, is the President of the University and a highly regarded member of the local community. You have known her for a long time and have worked together over the years on youth justice issues.

You know she will not raise money for you directly but you also know she genuinely cares about the unfair treatment of the kids in your community.

How could you use this relationship to raise money?

What could you ask Lotta to do?
Growing Your Donor Base
Strategy #2: Upgrade Model
Developing and Upgrading Major Donors
Fundraising is DEVELOPING Relationships
Ladder of Engagement

1. Point of Entry
2. Development
3. Ask and Close
Recognition and Stewardship: Say Thank You

As the relationship with the donor grows, so does his/her giving. Gifts increase in size the closer the human interaction and involvement. Personal visits generate higher gifts and commitment than phone calls, and phone calls generate higher gifts than the mail.

More human contact and connection, increases the return in fundraising.
Donor Engagement

- Thank
- Praise and Acknowledgment
- Ego - feeling important - a leader
- Ego - feeling important – needed
- Visibility and Recognition
- Making a critical difference
- Competition
- Part of a team
- Feel like insiders
- Professional contacts
- Social
- Fun
Donor Engagement Strategy: Piggy Backing
“Program Officers are People Too!”
The most important part of getting a grant is the grant proposal itself.

True ____  False _____
Scenario: Donor Development

One of your long time supporters, Sasha B. Leever, hosts an outreach party. There is one person in particular who has the potential to be a major donor. You chat briefly with the donor, exchange information, and then the event ends.

The next day, you call Sasha to learn more about the prospect. Sasha insists that the donor is an easy touch and all you need to do is to call and ask for the donation.

Is this a good idea? What would you do?
Scenario: Cocktail Party

You are at a cocktail party at a neighbor’s house. You find yourself in a conversation with a friend of your neighbor’s who turns out to be an extremely wealthy attorney. The conversation turns to your work on criminal justice issues. You very much want to ask this attorney for money but you don’t want to seem inappropriate.

How do you begin to develop this donor? What do you say? What do you do next?
Growing Your Donor Base
Strategy # 3: Donor Centric Messaging
The Case Statement

- Why should I give you my money?

- Problem/Solution

- What is UNIQUE about your organization –
  - What do you have to “sell” than no one else has

- How will the world be different as a result of the donation I give you?

- Why YOU?

- Why NOW?
Message

- Start Where They Are - Their Benefit/Interest
  Begin with the donor's own set of interests, attitudes, and values. Ask questions!

- Impact, not Need
  Talk about what you are doing, not about the fact that you need money.

- Keep it Short
  Be concise and get to the point.

- Speak from your heart
  Use your own passion to set the tone and guide the language.
Message

▪ Ask for a specific amount
  Your ask must include an actual dollar amount.

▪ Ask a question and get an answer
  "Close" the sale by asking a specific question and then waiting until you get a clear answer.

▪ Stop

▪ No Apologizing
  Remember that you are giving them an opportunity to do something wonderful!
Message

1. State Benefit

2. Prove Viability

3. ASK!
Viability and Credibility

- Polls and Statistics
- Plan
- Team/Staff
- Endorsements
- Media/Clips
- Fundraising
- History of Success
- Direct Experience with Program
- Relationship with Organization
Donor Communications

Systematic: Make a calendar
INFRASTRUCTURE
HOW: TOOLS
Fundraising Tools

- Special Events
  - Auction (silent)
- Structured Giving Levels
- Planned Giving
- E-Mail/Internet
- Website
- Service Events
  - Bake sales, car washes
- Mail
- In-Person Visits
- Phone - Paid/Volunteer
- Government

- Direct Response Marketing
- Merchandising
- Foundations
  - Large, national
  - Small, family
- Corporations
  - National chains
  - Local Businesses
- Work place giving (CFC, United Way)
- Drives
  - Raffle
  - Canvassing/Blitz
  - A-thons
### Matching Targets with Tools

<table>
<thead>
<tr>
<th><strong>TARGETS</strong> (Who)</th>
<th><strong>TOOLS</strong> (How)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lapsed donors</td>
<td>Letter</td>
</tr>
<tr>
<td>Labor staff</td>
<td>Small cocktail reception</td>
</tr>
<tr>
<td>Enviro donors</td>
<td>Phone bank</td>
</tr>
<tr>
<td>Students</td>
<td>Campaign</td>
</tr>
<tr>
<td></td>
<td>Gala</td>
</tr>
</tbody>
</table>
Scenario: Fundraising vs. Outreach

Event #1
- Format: Large cocktail party; wine and cheese
- Location: Downtown Hotel
- VIPs: US Senator, local TV news personality
- Cost: $50 per person
- Invitees: Friends of the organization
- Projected Attendance: 100

Event #2
- Format: Small lunch; catered three-course meal
- Location: Home of board member
- VIPs: Mayor’s Chief of Staff
- Cost: $500 per person
- Invitees: Friends of two board members
- Projected Attendance: 5

Which is the better event?
Fundraising Planning
Dashboard Tool
Projections Waterfall

GOAL: $100,000

Raised to Date (RTD) = $5,000

Still To Raise (STR) = $95,000

HARD COMMITMENTS

SHIN EVENT: $10,000
Labor APPEAL: $5,000

STR: $80,000

GOAL: $80,000

Annual Event: $25,000

STR: $55,000

2 Email campaigns @ $10K ea. = $20,000

STR: $35,000
MICRO-STRATEGIES for Target Prospects
Micro-Strategies for Target Prospects

1. What do you have that the prospect wants (circle)
2. Who is the Connector
3. What is the fundraising message
4. Who is the best messenger
5. Who will hold this relationship
6. Materials needed
7. Implementation – what, by whom, when
Strategy Work

1. Donor Engagement Activities/Piggyback
2. Waterfall dashboard tool
3. Micro-strategies for key donors
4. Micro-strategies for key connectors
5. Case statement
6. Donor Centric Messaging
7. Create a list of connectors
8. Create donor communications calendar
IMPLEMENTATION: Strategies for Success
The Typical TO DO List

Real Work

✓ Organize coalition meeting

✓ Mail media alert re: report

✓ Put call in to supportive legislators re: update on progress to date

✓ Set up meeting with Judges for Justice Council chair to ask if she will join the campaign

Also

✓ Fundraise
Fundraising is MOVEMENT BUILDING
FUNDRAISING = ORGANIZING!
Building Movement Strength

I. Political Capital (Power)

II. Social Capital (Visibility)

III. Volunteer Capital (Time)

IV. Financial Capital (Money)
Full Integration of All Capital

- Political Capital
- Volunteer Capital
- Social Capital
- Financial Capital

MOVEMENT POWER
Fundraising Implementation: Getting to Goal
Time Allocation

<table>
<thead>
<tr>
<th>Important</th>
<th>Not Important</th>
</tr>
</thead>
<tbody>
<tr>
<td>Urgent</td>
<td>Reactive</td>
</tr>
<tr>
<td>Not Urgent</td>
<td>Time Sink</td>
</tr>
</tbody>
</table>
FUNDRAISING is Pro Active Leadership

- Important
  - Re-Active
  - Executive Leadership FUNDRAISING!
- Not Important
  - Time Sink
  - Low Priority

Urgent
Not Urgent
Implementation: Getting It Done

- Setting priorities = Saying No
- Staff the plan
- Set deadlines
- Hold yourself and the staff accountable
- Small, realistic steps
Planning: Models of Pro Active Time Management
Tactics for Proactive Time Management

1. Schedule time on your calendar

2. Physical location
   - Leave the office
   - Work from home
   - Isolation from re-active urgencies

3. Use internal staff as meeting partner to hold time on calendar

4. Find external stakeholder to serve as thought partner
Hands On Practice: The Ask
The ASK: Anatomy of a Major Donor Visit

1. Casual Conversation - Build Relationship
2. Reference points for relationship
3. Introduce Organization
4. Formal Presentation - Macro to Micro
5. Get Feedback – Ask Questions!
6. General Discussion – Explore self-interest; Look for the match
7. The Ask
   - Say a number!
   - Stop!
   - Listen!
Fundraising Ask

8. If No:
   - Negotiate Amount
   - Address Concerns
   - Provide Information
   - Restate their self interest

If Yes:
   - Thank
   - Confirm logistics of donation
   - Follow-up
   - Thank

9. Follow-up
10. Thank, thank, thank
[11. Ask Again!]
Fundraising Ask – Cheat Sheet

1. Ask a question

2. Say a number

3. Stop

4. Listen
END
Fundraising Strategies

1. Board Management
2. High Dollar Programs
3. Sustainer Programs
4. Events
5. Mail
6. Online
7. Multi-Channel Strategies
Event Assessment Questions

1. Who will BUY the tickets? Why?

2. Who will SELL the tickets? Why?

3. Given your target group, where and when should you have the event?

4. Given your target group, what program components would be compelling (e.g. food, celebrity, entertainment, etc.)

5. How much will your event cost? How much will you raise? How much will you net? Is this event worthwhile?
Scenario: *Event* Assessment

You have decided to put on a fundraising event. Cara Lot has gone right to work and found a caterer who will donate the food for free, a hotel who will donate their best ballroom for free, a printer who will donate the costs of the invitations, and she has convinced the Mayor to put the event on her schedule.

In addition, one of your board members has gotten hold of a list of 1200 donors who give $10,000+ to the symphony.

Does this mean you have everything you need for the event?  
What key questions need to be answered?
Scenario: The Event

The staff and board are very excited. Your board chair, John Amazingo, has gotten Stevie Wonder to agree to appear at a fundraising event for you.

What's more, Wonder will be in town the same week that you are releasing a major news story and the timing could not be better.

The board is thrilled. The staff is thrilled. This is the big break you have been waiting for. You are asked to put together a fundraising event.

Is this a good idea? How do you decide? What do you do?
Strategic Use of Event Honoree

✓ Honor Business Leader

✓ Honor Philanthropist

✓ Honor Activist

✓ Select honoree based on target donor groups – work backwards
USE FUNDRAISING MATCH
USE OF SURPRISING MESSENGERS
ON-LINE STRATEGIES
Online Giving 2015

Offline 92.9%

Online 7.1%

Source: Blackbaud Index Giving Report
Online Giving

- Online giving grew 9.2% between 2014 and 2015
  - Higher Education institutions grew their online giving the most compared to K-12 schools and other non-profits
- 7.1% of overall fundraising was raised online in 2015
- #GivingTuesday is the most successful online campaign
  - Has continued to increase 52% each year in online donations

Source: Blackbaud Index Giving Report
Fundraising Tools

1. Donor Architecture
2. Sustainer Programs
3. Events
4. Mail
5. Email
6. Multi-Channel Strategies
BUILD FUNDRAISING ARCHITECTURE
Major Donor Giving Structure

- Provides structure to the ask
- Provides a ‘membership’ program for major donors
- Gives donors a place to ‘be’ within the organization
- Decide what giving levels to establish
- Dare to have a high level
- Decide what benefits can you offer
Fundraising Architecture: High-Dollar Giving Structure

- Define Giving Levels
- Have top level be slightly beyond present donor giving
- Don’t mix high dollar outreach with low dollar outreach
- Create benefits – use piggybacking
Fundraising Architecture:
High-Dollar Giving Structure Benefits

- Visibility
- Recognition
- Insider Information
- Access to VIPs
- Professional Advancement
- A part of the ‘family’
Fundraising Architecture: Advanced

- Brand/Personality
- Leadership
- Parallel structure to board
  (e.g. Advisory Board; Trustee Council, etc.)
Ladder of Engagement

Point of Entry

Development

Ask and Close
Major Donor Program: Create Entry Points

- Conference Calls
- House Parties
- Tours of programs in action
- Open House
Fundraising Tools

1. Donor Architecture

2. Sustainer Programs

3. Events

4. Mail

5. Online

6. Multi-Channel Strategies
Monthly Giving Programs
Sustainer Programs

1. Make it your first ask; your default outreach tool

2. Set a goal
   • By Dollar
   • By Donor

3. Commit resources to it (time, money)

4. Create an identity
   • Name
   • Visual/logo
   • Theme/Tone
Sustainer Programs

5. Develop brochure or other outreach materials

6. Give donors special recognition, visibility, and benefits

7. Develop messaging around ‘why’
   • Green
   • Powerful
   • Sustainable
   • Easier for the donor
Fundraising Tools

1. Donor Architecture
2. Sustainer Programs
3. Events
4. Mail
5. Online
6. Multi-Channel Strategies
Fundraising Tools

1. Donor Architecture
2. Sustainer Programs
3. Events
4. Mail
5. Online
6. Multi-Channel Strategies
FUNDRAISING MAIL
Mail Programs

- Requires upkeep and active management
- Takes investment (time and money)
- 20% of a list goes bad every year

How to acquire lists

- Buy
- Viral
- Friends of friends (with incentives)
- Trade/Barter
Mail Programs: Be Creative

- Different color
- Different sizes
- Different letterheads
- Different signers
- Different tone (urgent, thoughtful, humourous, celebratory, etc.)
- Post Card
- Lift Letter
- Creative inserts
Alternative Messengers

- Consider use of alternative messengers
- Known and trusted by your members
  - Not necessarily an expert
- Go up the scale
  - High-profile, high-visibility names
- Go down the scale
  - Real-world constituency that you serve and defend
Writing Fundraising Text
DO’s and DON’T’s of Written Text

✓ DO make your letter look like a personal communication.

✓ DO make the opening line an attention-getter.

✗ Don't be overly wordy - use a short and punchy writing style.

✓ DO ask for a specific amount.

✗ DO NOT apologize.
DO’s and DON’T’s of Written Text

✓ **DO** create a sense of urgency.

✗ **Don't** confuse fundraising text with persuasion text

✓ **DO** include a P.S. that restates the ask.

✓ **DO** have a specific and clear action step

✗ **Don't** put off your outreach because the letter or email is not “perfect”. 
Dear Friend of Youth:

We are writing to you today because we are hoping that you may be interested in supporting some of the important work that our wonderful organization does.

As you may know, we very much need your help. Due to increasing costs in our yearly overhead, and our need to expand our staff, our budget has nearly doubled in the past two years and yet the income we receive from our regular members is actually shrinking! So the support of every potential member is very important to us.
We are working hard on a number of exciting initiatives and, with the support of friends like you, we can put together an important and effective program - - but only if you help.

I know that times are hard and the demands of family are many, so we’re only asking you to send whatever you can, whenever you can. No amount is too small - - just remember that every little bit helps.
Sample Fundraising Text

We’d like to thank you in advance for what could be a valuable surge of support to keep our programs out of debt and our organization strong.

Thank you,

The Fundraising Committee

P.S. If you would like to volunteer, please call Dana at 515-234-4444.
Fundraising Tools

1. Donor Architecture
2. Sustainer Programs
3. Events
4. Mail
5. Online
6. Multi-Channel Strategies
ON LINE FUNDRAISING 2012
7% of All Gifts
11% Increase from 2011

Source: Blackbaud Index
2012 Charitable Giving Report
company could be formed to buy the line. In response to this, in July of 1979, the Wolfeboro Steam Railroad Corp. was formed and stock sold. Again the State was asked to purchase, allowing the new Corporation to lease and operate.

The NHTA was sympathetic to the cause, but, their interest was in freight traffic. As the WRR only had two infrequent customers, they were powerless to act. They did, however, offer a sizeable grant toward the purchase of the line by the WSRC, but, because of legal reasons, had to later withdraw the offer.

In the meantime, a group of businessmen from the New York area had become interested in the branch.

After long negotiations, the line was sold and the new owners planned to resume operations in the spring of 1980. For the second time, the Wolfeboro line had been saved. The future was looking a little brighter.

During 1979, while the line was idle, the motive power roster was depleted somewhat. #9, the line’s first locomotive, had been out of service for some time and was the first to go. It was sold to a scrap dealer, for use in his yard. #10, having been on the WRR through a lease, was returned to the Strasburg R.R. Probably the most important loss was #405, and trailer unit #501. They were sold to the Old Colony & Newport Railroad in R.I.

Methodology

I tested eight Bluetooth headsets ranging from $39.99 to $149.95. Because I found charging times, talk/standby times, and devices on design, comfort, stability, value. I tested them first using a T-Mobile phone, then a Verizon Blackberry. I placed both ears and when speaking, cocked exaggeratedly up, down, and side to side intolerant older gentleman (my father’s roommate, and a professional movie assistant in the testing.

1) Form and Function (10 possible points) Does a device look cool? Does it have any design that improve its performance? I also considered stability: Did the Bluetooth stay put when I shake my head, or rush down the stairs? Were there options for different device pinches, dangle, poke—or did I was wearing it?

2) Sound Quality (10 possible points) Headset from four locations: inside my wind-whipped 24th-floor rooftop, behind and across from a construction zone. I asked myself, and the person on the other end of the line, the same questions: How well can you hear me? How well

Subject: Come work with us

Dear MoveOn member,

Have you ever read one of our emails and thought "I could do better"?

Well, now's your chance! For the first time, we're hiring MoveOn fellows: five-month paid positions working alongside our top campaigners and organizers on the most important issues of our times.

Whether you're a recent college grad or a movement veteran looking for a change, we're looking for a few great folks who are passionate, innovative, and ready to move progressive politics. If this is you, just click below to fill out the application by September 21st. Or be sure to pass on to family and friends who might fit the bill.

http://www.moveon.org/fellowship?id=11240-1204997-p7422C&t=4

It's a great trade—if you share your ideas and time with us, we'll teach you all we know about online organizing.

We're looking for a diverse group of applicants, united by their passion for a more progressive America. Maybe you've spent years working for progressive organizations. Maybe you haven't even finished school. How you got here isn't important; where you're going is.
M+R Strategic Services:
FOUR KEYS TO A SUCCESSFUL EMAIL

1: Clarity: Is what you’re saying absolutely clear?
   *(If they don’t know what you’re saying, how could they possibly care about it?)*

#2: Engagement: Is what you’re saying of compelling interest to the reader?
   *(Remember, it’s about what matters to the reader, not what matters to you.)*

#3: Emotion: Have you reached beyond intellectual arguments?
   *(Will your message grab its readers on a gut level?)*

#4: Urgency: Have you made a case for the need to act right now?
   *(If not, they might just close your message and forget all about it)*
M+R Strategic Services:
Things to Avoid

- Typos, bad grammar
  - Multiple “asks”
- Policy “wonk” language
  - Insider jargon
- Stiff or formal language
  - Long sentences
- Big blocks of text without spaces
  - Confusing language
  - Boring text
M+R Strategic Services: MAKE THE SUBJECT LINE COUNT

• Include personal info, specifics, dates, deadlines (first name, town/city, profession, etc.)
• Be creative, keep it fresh
• If it’s urgent, say so!
• Keep them shorter. Try not to use more than 40 characters because…
M+R Strategic Services:
EXAMPLES: GOOD SUBJECT LINES

- Howard Dean’s Campaign
- **Subject: Unbelievable**
- **Subject: The best photo you’ll see all day**

- MoveOn.org
- **Subject: Best. Ad. Yet.**

- TrueMajority
- **Subject: We Want to Tell You, But We Can't!**
- **Subject: JUST IN: Rumsfeld Out! Seize this moment.**

- HRC
- **Subject: URGENT: Block this nomination!**

- Oxfam America
- **URGENT: Please Help Tsunami Survivors!**
On-Line Text

- Personalize
- Use every day language
- Ask
- Be Someone
- Write to someone
On-Line Formatting

- Watch white-space-to-text ratio
- 2-3 sentences per paragraph
- Do not start with a photo that might not appear in some email programs
- Use readable fonts
On-Line Formatting

Readable Fonts:

- Verdana 9-10 pt
- Arial 10-12 pt
- Times 12 pt
- Georgia 10 pt
It is good to embed links to youtube clips or other news sites in your email. It makes your email seem more substantial, lends credibility to your message, and increases the likelihood that donors will engage more with your message.

True _____  False______
DO’s and DON’T’s of Email Appeals

✓ **DO** use short sentences

✗ **Don't** use policy wonk language or insider jargon

✓ **DO** have small blocks of text with spaces in between

✓ **DO** ask early on and more than once

✗ **Don't** use stiff or formal language.
DO’s and DON’T’s of Email Appeals

x Don’t imbed links that take the reader away from your page

✓ DO write in the first person

x Don't ask for more than one clear action

✓ DO make the subject line count
Beth --

Will you add your name for the chance to meet me for dinner on the campaign trail?

Here’s what’s on the menu: Wonderful food (I’m still thinking about the cauliflower pizza from last time!), great conversation, and maybe even time for a selfie (I’m getting pretty good at them!).

We’ll fly you out, and you can obviously bring a friend. I’d like to see you and thank you before we move into the biggest phase of this election yet -- just add your name today:

Hope to see you there,

Hillary

Chip in $250 to join more than 1.2 million grassroots donors standing with this campaign and be automatically entered for the chance to win dinner with Hillary:
Beth --

In just 13 days, this campaign will face our biggest test yet: Super Tuesday. A dozen contests in a single day with more than 800 delegates on the line -- if we win big, we'll be well on our way to the nomination. But if we continue to be outraised and outspent as we were in New Hampshire, the results may be disappointing.

Beth, I'm so grateful to the thousands of people who've chipped in to support our Super Tuesday Fund -- including you! This campaign was never going to be easy, and in a fight this tough, there's no one I trust or depend on more than you. You are the backbone of this campaign, and when we win, you will be the reason why.

So today, show me you're with me. Thank you so much for your recent contribution — all it takes is another $5 to say you're ready to win on Super Tuesday, win this nomination, win the White House, and make history.
TO: Worker Safety Supporters  
From: CPWUOGHO Outreach team  
Subject: City Council Res. 10421

Dear Worker Safety Supporter:

We are writing to you today because State Res. 10421 is coming before our state legislature this session. And it is of utmost importance and priority that we work now to bring to a halt this potentially devastating piece of legislation whose impact on our city will be felt for years to come if we don’t work now to stop it. Right now the bill is making its way through the committee that has oversight over all DOJ and OSHA in our city and if it gets just three more votes of support, it will leave the committee and be sent to the legislative floor for actionable
voting and possible passage. This is the worst bill we have seen in decades in this state and it is likely that it will pass unless we work hard to put a stop to it. This bill is the kind of pro-active conservative agendizing that represents the worst of our opposition’s ability to coalesce around a single issue and create a maelstrom of discontent from among the very constituency groups and stakeholders who would not be served by such a bill.

Please help if you can. The bill is going to come up soon and we need your support to fight this. Please click on this link at cspan to see a video of right wing legislator O’Really Scarey speaking out in favor of this disturbing piece of legislative potential.

Thank you for whatever you can do to help.

Sincerely,
the CPWUOGHO outreach committee
Fundraising Tools

1. Donor Architecture

2. Sustainer Programs

3. Events

4. Mail

5. Email

6. Multi-Channel Strategies
Fundraising Tools

1. Donor Architecture
2. Sustainer Programs
3. Events
4. Mail
5. Online
6. Multi-Channel Strategies
Multi-Channel Strategy

▪ Use multiple channels to reach donors
▪ Each channel is stronger together than alone
▪ Coordinate and combine:
  • Mail
  • Phone
  • Email
  • Events
  • Program
Multi-Channel Fundraising*

- Multichannel donors are your best donors
- Multichannel donors are more loyal -- retention rates average 51% compared to 30% for offline and just 22% for on-line
- In one study, median revenue per donor for multichannel donors was $339 -- compared to $88 offline only and $170 for on-line only.

---From Adams Hussey and Assoc.
Channel Awareness

- Donors tend to stay in the channels through which they first gave.

- Segment donors according to their initial gift (i.e. mail donors through the mail, event donors through events, etc.).

- Solicit donors in the channels through which they first gave.
Best Practices
Summary: Fundraising Planning Strategies

1. Know their self-interest
2. Use Multi-channel outreach
3. Segment donors - channel awareness
4. Match Tools and Targets
5. Message: Program, not need
6. Alternative messengers
7. Build the relationship
8. Diversify revenue streams
Building A High-Performing Board
Best Practices: Ten Basic Responsibilities of Non-Profit

1. Determine the organization’s mission and purpose
2. Select the Chief Executive
3. Support the Chief Executive and assess his/her performance
4. Ensure effective organizational planning
5. Ensure adequate resources
6. Manage resources effectively
7. Determine, monitor, and strengthen the organization’s programs and services
8. Enhance the organization’s public image
9. Ensure legal and ethical behavior and maintain accountability
10. Recruit and orient new board members and assess board performance

From Ten Basic Responsibilities of Non-profit Boards, by Richard T. Ingram, National Center for Nonprofit Boards
We need rich people on our board!

True _____ False _____
Board Motivation

Guilt!
Board Motivation

Fear!
Board Motivation

Begging!
Board Motivation

Haranguing!
Board Motivation

No Guilt!

No Fear!

No Begging!

No Haranguing!
Motivating Your Board

- PROGRAM not need
- Culture of accountability
- Recognition for high-performing board members
- Achievable goals/Sense of effectiveness
- Peer pressure
- Leadership
- Create ability to be successful
High-Performing Board Strategies

1. Everyone does something
   A. Consider no Development Committee
   B. No such thing as a “fundraising seat”

2. Set clear expectations
   A. Create a board job description
   B. Set Individual Goals; Set Group Goals
High-Performing Board Strategies

3. Establish alternative structures
   A. Show horses vs. Work Horses

4. Build accountability process - peer to peer
Board Members as AMBASSADORS
Creating a Culture of Accountability

- Recognition for high-performing board members
- Achievable goals/Sense of effectiveness
- Motivate with PROGRAM and IMPACT not need
- Peer pressure
- Leadership
- Create ability to be successful
Scenario: The Board

You come back from the fundraising training ready to get your board motivated around fundraising.

When you bring it up at the next meeting, the board tells you in no uncertain terms that they can’t do fundraising, they don’t know rich people, and you should spend your time looking to fill the fundraising “slots” on the board.

What do you do? How do you respond?
Board Recruitment
Finding New Board Members

- Dare to be choosy
- Devote resources to it
- Assign responsibility
- Target non-traditional communities
- Assess current board skills and needs
Board Recruitment

- Advertise
  - Be picky
  - Be proud
- Network
- Be pro-active: Look for what you want; don’t just accept what you get
- Formalize the process
  - Application
  - Job description
- Be upfront about fundraising expectations
- No apologizing!
Scenario: Board VIPs

Through great good fortune, one of your board members, Starr Struck, knows Danny Glover and thinks that he would be an ideal person to have on the board. Starr insists that you should draft a letter asking Danny to join. She feels his name, his prestige and his ‘blue chip’ reputation are just what the organization needs to take you to the next level of visibility and success.

Is this a good idea? What is the best way to use Danny Glover?
Materials
Fundraising Materials

1. Describe what you do

- Basic outreach brochure
- List of accomplishments
- Goals for the future
  - Specific
  - Concrete, short term
  - Aspirational, long term
  - “Visual”
Fundraising Materials

2. Credentialize

- Bios of staff and leadership
- Quotes from third party credentializers
- List of endorsers
- Clips
- Fundraising success
- Graphic
  - Illustrates the impact of the program
  - Illustrates the challenge of the problem
Fundraising Materials

3. An “Ask”
   • Invitation to join fundraising program
   • Benefits of joining fundraising program
   • Mechanics of contribution (!)
Fundraising Materials in the Internet Age

1. Major Donor Packet
2. Impact Report
3. Palm Card
4. Finger book – alternate sizes
5. Strong visual
6. Powerpoint deck
7. Flash drive
FUNDRAISING STAFF
Fundraising Skills

- Keep track of details
- Good at follow-up
- Passionate about the mission
- Good communicator
  - Writing
  - Verbal
- Like building relationships
- Focus on the bottom line
- Think Strategically
- Manage/Motivate others – up and down
- Ask and close
FUNDRAISING TASKS
Fundraising Tasks

1. Clerical/Administrative
   • Data base management
   • Production (mail, reports, etc.)
   • Filing
   • Budgets
Fundraising Tasks

2. Track donor data and contact
   • Track dates of contact
   • Track materials sent
   • Track previous contribution history
   • Track outcomes and next steps
Fundraising Tasks

3. Manage Logistics and Production
   • Mailings
   • Events
   • Travel
   • Meetings
   • On-line program
   • Foundation proposals
Fundraising Tasks

4. Writing

• Grant proposals
• Grant report
• Letters of Introduction
• Emails
• Correspondence
• Thank you letters
• Requests for a meeting
Fundraising Tasks

5. Project Management
   • Tasks
   • People
   • Time lines
   • Due dates
Fundraising Tasks

6. Plan/Manage

• Think Strategically
• Think Creatively
• Stay on track
• Hold people accountable
• Manage up
• Manage down
Fundraising Tasks

7. Contact with donors
   • Develop the relationship
   • Maintain the relationship
   • Hold the relationship
Fundraising Tasks

8. Ask and Close