



Fundraising Basics Part II

A love story

Part II: Developing an individual giving strategy

Previously in **Fundraising Basics: A Love Story, Part I**, we discussed [donor research and prospecting](#). Now that your organization has identified and courted likely prospects, it's time to make "the ask."

The ask is the element of fundraising when a nonprofit's wooing pays off—it's the proposal in the development love story. The ask should be entwined with a well-thought out fundraising strategy that focuses energy and resources on thoughtful communication. These strategies explore the big picture and provide a road map for focused efforts, enabling all to stay on-task and work toward a tangible goal.

If your nonprofit is ready to pop the question and turn prospects into donors, read on for tips to develop a proposal that they are sure to love.



What's going on?

First things first: Take stock of your nonprofit's current strategy ... if there is one. Gather your development team to reflect on the organization's mission, vision and goals prior to planning any further. Analyze the current state of the nonprofit in reference to funding practices. Try delving deeper by asking questions such as:

- How long has your nonprofit provided its current services or resources to the community?
- Does your nonprofit have documented credibility within the community or cause?
- What kind of programs do you offer? Are these programs attractive to donors?
- Does your nonprofit collaborate with any like-caused organizations, community groups or federal, state or local government?
- Who is your target donor audience? Are there organizations within the community that share this same audience or have a similar vision and mission? Do they have a secure fundraising program in place?
- What is your nonprofit's image within the community with constituents? With current donors? With prospects?
- Has your nonprofit's current fundraising strategy been successful? How often are elements within the strategy updated or rethought? Are donors bored with your strategy's tactics or have they come to expect it?

These analytical conversations serve as the foundation to your entire fundraising strategy. Answering the tough questions should help your nonprofit set goals and develop tactics by identifying needs, strengths and weaknesses, along with opportunities for growth or improvement.

Shoot for the (reasonably attainable) stars!

Next, use the outcomes of your conversations to set goals and objectives. Not only will goals add purpose to your strategy, but they can be the benchmark for gauging the advancement and success of your efforts.

Nonprofit fundraising coach and author Sandy Rees agrees, saying that, in setting goals, "You'll be much more likely to be successful in reaching them and raising the money your organization needs."¹

Rees recommends keeping the acronym SMART in mind:

S – Specific. Be very clear on what you are hoping to do. Use exact numbers and concise phrases. Answer the who, what, where, when, why and how to make your goals quantifiable.

M – Measurable. How will you recognize success unless you measure your efforts? Whether it in dollars raised, new donors obtained or impressions made, make your goals measurable ... and then, measure them!

A – Attainable. Don't set your nonprofit up for failure by working toward a goal that just can't happen. Know the resources you have to work with, and address challenges.

R – Realistic. This one goes hand-in-hand with "Attainable." While it's nice to dream, setting goals that aren't realistic are not going to help your strategy or team morale.

T – Timely. Goals have a timeline—a start and an end. Not only will this aid in measurement, but the progress of your overall fundraising strategy will be based on this timeline.

As you determine your goals, think about what gap the fundraising efforts will fill. Is this an annual campaign, a capital campaign, a holiday appeal or is there a specific program that is in need of funding? Does your nonprofit hope to receive a spike in gifts, or are you seeking a series of gifts from a donor throughout his or her lifecycle? These questions will guide in determining your nonprofits fundraising goals and outlining the overall strategy.



¹ Rees, Sandy. "Make Your Fundraising Goals SMART!" EzineArticles Submission - Submit Your Best Quality Original Articles For Massive Exposure, Ezine Publishers Get 25 Free Article Reprints. Web. 01 Nov. 2009. <<http://ezinearticles.com/?Make-Your-Fundraising-Goals-SMART!&id=2414784>>.

Set a fundraising budget and timeline

Once goals are established, a budget and timeline should follow suit. The budget and timeline should be developed with the action plan and tactics portion of your strategy in mind.

A budget should outline the anticipated expenses for covering the costs of your strategy, and from what sources these costs will be covered. Expenses may include:

- Staff time
- Printing, photocopying, equipment and supplies
- Postage and shipping
- Telephone, fax and internet usage
- Travel (for general coordination and to meetings with donors)
- Food and entertainment (during meetings and at special events)
- Professional services or consultants (sponsorship consultants, party planners, etc.)
- Promotional material



The timeline should address what needs to happen, when it will happen, how it will happen and who is responsible for it. Also take into account holidays, staff vacations or potential conflicting community and competitor events.

Formalize your purpose

After budgets and timelines come the case statement. This is the script for your proposal—a brief explanation of your nonprofit's purpose and need for funding. Ultimately, it's the wording of case statements that make it evident to prospects and donors why they should give. In various reincarnations a case statement may be used in all communications of your fundraising plan and will guide board members, staff and other advocates to be consistent in messaging when speaking to prospects or members of the community.

A few tips for creating your nonprofit's case statement:

- Involve everyone—staff, board members, volunteers, donors and those benefitting from your nonprofit's work.
- Keep it simple and concise—one to two short paragraphs at most.
- Base it on your nonprofit's strengths and the differences your mission is making in the lives of others, as opposed to focusing on the need for funding.
- Project into the future—an ask is not the annual report; don't look back, look ahead!
- Be donor-oriented—present the case from the prospect's point-of-view.

- Be an investment—demonstrate what a gift to your nonprofit means.
- Be timely—make it clear why a gift is needed *now*.

Remember to consistently update your case study with new fundraising appeals or campaigns to ensure that your nonprofit is providing fresh and interesting content to keep donors hooked.

Develop an action plan that explores a variety of tactics

Now, the fun part—developing your nonprofit’s fundraising action plan! You read that right; fundraising is more exciting than ever these days. With the internet and social media, in addition to traditional fundraising tactics, the possibilities really are endless and the opportunities to engage prospects and donors are unlimited.

The following tactics should be executed in accordance with a timeline and a communications plan. Many of the tactics are also the methods of communication—but, keep in mind that your nonprofit will be better poised to raise funds if you employ a variety of tactics and promote these tactics through a variety of channels. Don’t discount press releases and paid advertising to help spread the word.

Tailor your efforts to your target audience, considering the communication preferences and patterns of the donors or prospects being courted. Varying demographics and giving ability of your audience will affect the ways in which they best respond to asks. Therefore, your action plan may be highly targeted or incorporate a variety of tactics and channels to appeal to everyone.

1. Direct mail packages

Direct mail is the go-to fundraising tactic for many nonprofits. Why? Because packages are relatively easy to create—often using a new letter with already created and printed collateral—and can be assembled in-house by staff or volunteers. Donors and prospects of older demographics often prefer this method of marketing, and donors with an already established history of giving to your cause are more likely to respond to this tactic in that they are likely more familiar with your organization than those not previously contacted.



Meanwhile, younger demographics or new prospects that have not been fully cultivated may require upward of five mailings before an appeal will elicit a response. This should not deter your nonprofit though, as studies show the costs associated with these mailings is recovered in future donations within two to three years.²

² "Idealist.org - The Nonprofit FAQ - How should we use direct mail?" Idealist.org - Welcome to Idealist.org - Imagine. Connect. Act. Web. 23 Oct. 2009. <<http://www.idealists.org/liflilen/faq/349-48/339-311>>.

Your nonprofit's direct mail packages may include:

- **An appeal letter:** Mary Ellen Barnes, a contributor to Idealist.org, recommends drafting these on board letterhead, keeping sentences short, using the first few paragraphs to illustrate the differences your nonprofit is making, and waiting until at least the third or fourth paragraph to make the ask. Additionally, write with urgency and skip the despair.³
- **A personalized reply form:** This form allows prospects and donors to make a gift or pledge support in a non-monetary way. It should capture contact information, payment options, special directions (i.e. if they would like to specify how their donation is used) and the opportunity for donors to request addition or removal from a mailing list.
- **A reply or remit envelope:** This envelope should be pre-addressed with attention to development staff. Some nonprofits also choose to include return postage.

Direct mail packages sometimes also include:

- **A lift letter:** These, explains Kristen Cici, author of the Nonprofit S.O.S. Blog (www.nonprofitsos.blogspot.com), are letters, "designed to 'lift' the response rate of your mailing." Typically, these are written by a donor, volunteer, program participant or supporter (then edited by your organization), and they help to compellingly build your case and add credibility. It is usually paired with the standard ask letter.⁴
- **A brochure, newsletter or other collateral:** These explain your cause or strengthen the case for donations.



Tips and tricks:

- Include teasers on the outside of envelopes to entice recipients to open.
- Donors and prospects like to feel special—hand address envelopes in blue or black ink, and opt for stamps instead of bulk mail indicia. Affix the stamp off center or slightly crooked to imply that a person put the mailing together instead of a machine.
- Code your remit envelopes by numbering them or marking them with a colored dot—this enables you to measure the response rate of different variables ... hand written versus typed addresses, different messaging or different contents.

³ "Idealist.org - The Nonprofit FAQ - How should we use direct mail?" Idealist.org - Welcome to Idealist.org - Imagine. Connect. Act. Web. 23 Oct. 2009. <<http://www.idealist.org/lif/ilen/faq/349-48/339-311>>.

⁴ Cici, Kristen. "What is a lift letter?" Nonprofit SOS. Web. 01 Nov. 2009. <<http://nonprofitsos.blogspot.com/2009/06/what-is-lift-letter.html>>.

2. Special events

Like direct mail, special events are a popular fundraising tactic for many nonprofit organizations. Among many benefits, special events provide the opportunity:

- To obtain donations, or an environment in which to ask for a gift face-to-face.
- For donors to further network with other like-minded donors.
- For prospects to connect to your nonprofit in a way not possible through mail or other tactics.
- Some nonprofits discredit special events, saying that they are just too expensive and time-intensive to plan, and costs are not often fully recovered. But, we believe they can still be well worth the effort, as money is not the only gain from special events. "Events that don't bring in profits can still be valuable," says Ilona Bray, J.D., author of *Effective Fundraising for Nonprofits: Real-World Strategies that Work*. "Particularly if they bring visibility to your organization, mobilize and expand its donor base, or highlight a particular issue to your members and/or clients."⁵

Some special events to consider:

- **Auctions:** Silent and live auctions in conjunction with cocktails and dinner are classic event fundraising tactics. Nonprofits secure donated (in-kind) items, classes or workshops from community businesses and auction them off live (via an auctioneer and paddles), silent (through sign-up forms) or online (via Web sites like eBay®). Each year, the Seattle Humane Society's silent auction raises more than \$400,000 at their annual Tuxes and Tails event (<http://www.seattlehumane.org/tuxes2008/>).
- **Athletic events:** Asks are often more effective when they come from friends or family members, which is why athletic events—when walkers, runners or players are required to raise money in order to participate—are often successful. All you need to do is facilitate, recruit and market the event. Well-known athletic fundraising tactics include the American Cancer Society's Relay for Life (<http://www.relayforlife.org/relay/>) and the Susan G. Komen for the Cure 3-Day Walk (<http://www5.komen.org/>).
- **Gaming or raffles:** These include casino night events, raffles and other contests, usually held in conjunction with a dinner or cocktail party. Prior to pursuing this tactic, be sure your nonprofit is fully aware of gaming, gambling and raffle laws in your state.
- **Dinners or galas:** The constant in most special events, dinners or galas provide a social venue for donors and prospects to express their support



⁵ "Fundraisers Help Nonprofits Engage Supporters: Nonprofit Events Can Raise More Than Money by Building Advocates | Suite101.com." *Non-Profit Management | Suite101.com*. Web. 22 Oct. 2009. <http://nonprofitmanagement.suite101.com/article.cfm/fundraisers_help_nonprofits_engage_supporters>.

and enjoy a fine meal with entertainment. The most successful dinners or galas are themed (holiday, murder mystery, costume, etc.) or provide entertainment such as live music, comedians, theatrical performances or even fashion shows. Every year come Hollywood awards season, the Minnesota AIDS Project hosts its annual local red carpet event, Oscar Night (<http://www.mnaidsproject.org/give/oscornight.htm>). Known to sell out, guests purchase tickets for \$125 apiece well in advance. The night of, they walk the red carpet complete with local celebrities and “paparazzi,” enjoy drinks and hors d’oeuvres while watching the Oscars live on big screens.

- **Board-hosted events:** Often called ‘friend-raisers,’ these events are small, intimate gatherings hosted by your board members in their own homes for their friends, families or colleagues. Usually kept to one hour, friend-raisers are a super opportunity for attendees to engage with your nonprofit through someone they know on the board. Often, these events feature speeches from beneficiaries of a nonprofit’s mission and have collateral material or literature available for takeaway. Afterward, the host then makes an ask.⁶



3. Phone calls

Sometimes called “phone-a-thons,” arming staff and volunteers with a call list and a simple script can be a quick, cost-effective way for your nonprofit to raise money. Another alternative, similar to a friend-raiser, is asking each board member to call five friends and make a personal ask on your nonprofit’s behalf.

There are a few downfalls to phone calling though. Mainly, that many people do not take kindly to telemarketers, so volunteers should be prepared to make the call as friendly and unobtrusive as possible and check all no-call lists in advance. Here are some pointers to get everyone on-track:

- Provide a script for calls, but practice with staff so it isn’t obvious that callers are reading lines. Scripts should contain a brief introduction, an overview of your organization and the purpose of the call—the ask.
- Limit calls between 5:00 and 9:00 p.m. and always ask if it’s a good time to talk. If it’s not, offer to call back at a more convenient time.
- Have people track gifts by entering them and updated contact information into your development database.
- Make sure staff and volunteers have access to plenty of refreshments to keep them motivated!

⁶ “Friendraisers Help Nonprofits Engage Supporters: Nonprofit Events Can Raise More Than Money by Building Advocates | Suite101.com.” *Non-Profit Management | Suite101.com*. Web. 22 Oct. 2009. <http://nonprofitmanagement.suite101.com/article.cfm/friendraisers_help_nonprofits_engage_supporters>.

4. Online and e-mail

Next to your donor database, the most valuable tool your nonprofit has in fundraising is its Web site. Make sure information and links given online are up-to-date and easy to find. If your nonprofit is capable of processing donations online—either on your site or through a third party processor—be sure to also provide links to give on blogs and other social media or online efforts, too.

Look at these nonprofit Web sites for inspiration:

- Achieve Minneapolis (www.AchieveMpls.org) makes it clear where donor dollars are being spent.
- Seattle Humane Society (www.SeattleHumane.org) has a great donation page that explains the different giving options.
- The United Way (www.LiveUnited.org) incorporates strategic storytelling and dynamic content that makes Web site visitors want to give.

Consider utilizing e-mail marketing tactics to distribute an appeal, similar to how you would distribute an appeal in a direct mail package. Sites like ConstantContact.com or MailDog.com offer easy-to-create, customizable templates for tailoring your e-appeal. Keep in mind that a good e-mail appeal does four things:

1. Connects readers with your nonprofit.
2. Clearly states a need for funding.
3. Tells a story of the difference you are making.
4. Relaxes the reader. An e-appeal is written slightly more casually than an appeal letter, like an e-mail to a friend or colleague.

A great example of a winning fundraising appeal through e-mail comes from the Washington Animal Rescue League. In 2005, they sent the following e-mail and garnered more than \$9,000 in individual gifts from a list of 1,300 prospects and donors⁷:

Subject: A Special Request...

Dental Equipment Desperately Needed

My e-mails to you are normally limited to letting you know about special events benefiting The Washington Animal Rescue League and DC's homeless animals.

But today is different.

Right now, our Medical Center is in desperate need of a new dental machine. If you



⁷ "Email Fundraising Success Story." Npadvisors.com - Helping nonprofits Succeed Online: Tips on Internet Marketing, Email Communications, Fundraising, Donor Retention. Web. 05 Nov. 2009. <<http://www.npadvisor.com/NewContent/100480.asp>>.

have ever had a cavity, you know how excruciating the pain can be. Well, many of the cats and dogs we rescue have not been properly cared for and among other things, their teeth are in terrible condition - often, we must pull teeth.

Our current dental machine is ten years old and in constant need of repair. It makes cleaning and especially extraction very difficult, and yet the alternative - leaving an animal in pain and possible risk of infection - is not acceptable.

However, a new dental machine runs over \$5,000. Due to the current construction and the expansion of our shelter, this expense could not be afforded in our 2006 budget.

In response, we applied to a local foundation for a special grant, but they were only able to award us \$1,000 toward the dental machine in their current giving cycle.

So, we are about \$4,200 short of what is needed to purchase this new machine. I have never asked for contributions online before, but I am doing so now.

Will you please consider making a special gift today to help us purchase this machine so we can properly care for the homeless and neglected cats and dogs who we take in every week?

If you can send \$100 or even \$250 today, it will be a big help. Gifts of \$35, \$50 or any amount are also welcome. The important thing is for each person who receives this to respond. We do not have a very big e-mail list but each of you on it has helped the League in one fashion or another.

If you could find it in your heart to donate, just click here <http://lrs6.net/tn.jsp?t=7finotbab.0.0.gty75sbab.0&p=https%3A%2F%2Fwww.warl.org%2Fhowhelp%2FdonationForm.php> to be taken to our secure online giving page. In the memo line, just write in "dental machine" and your gift will be credited to this special project.

I will let you know how we do. I have promised our Medical Director we will find a way to get him the new machine, and I thank you for helping me succeed!

As always, thank you for your continued support of the homeless animals of Washington, DC, and of the League's many progressive programs.

*Respectfully,
Scotlund Haisley, Executive Director
The Washington Animal Rescue League*

Another online tactic includes employing fundraising sites to empower your prospects, donors and advocates to fundraise on your nonprofit's behalf. One such site and 4imprint customer is GiveForward.org, and it allows users to create pages for causes and then processes payment of gifts. Sites such as GiveForward.org are extremely cost-effective while offering maximum personalization in your nonprofit's fundraising efforts. Each page has the capability for storytelling through text, video, photos and calendars and can be easily combined with social media efforts as outlined below.

When pursuing this tactic, Desiree Vargas, president and cofounder of GiveForward.org, recommends these pointers for success:⁸

- Find a group of enthusiastic supporters who are willing to fundraise, but may not have time to be physically involved.
- Train these supporters to fundraise. Prepare them with language, and share your fundraising strategy with them.
- Ask that they be persistent in getting others to donate and join your cause as well.
- Reward supporters—acknowledge them in newsletters or offer prize rewards that make it fun and worthwhile for advocates.



5. Social media

Social media is a hot topic in fundraising right now—and for good reason. Social media fundraising efforts have the potential for huge returns without much of the costs involved in other traditional tactics. Additionally, it plays to the power of the third-party ask: Strangers will be more likely to discover your nonprofit and give if a friend suggests that they do so. When you hear of fundraising campaigns going viral, social media is often the driving force.

Blogging

Blogs can serve as a mouthpiece to demonstrate the efforts of your nonprofit. However, it's not likely that an ask will garner much movement through this channel when used alone. Build your blog with care over time with an overall communicative goal—then, come a specific campaign or appeal, you can refer people there for stories, interviews or guest posts from beneficiaries or other donors explaining why they give. Include a button or a widget on your blog to make it easy for readers to give.

Social networks

Sites like FacebookSM, MySpaceSM, TwitterTM and LinkedIn[®] are considered social networks, and their rising popularity gave way to the concept of micro-gifts. Micro-gifts are short-term fundraisers aiming to receive gifts of \$1 to \$5 from thousands of people. For purposes of this Blue Paper, let's walk through a few ideas for using Facebook and Twitter.

Facebook: On your organization's social profile, post updates on fundraising efforts and links to your Web site, campaign page and blog. If on Facebook, ask 'fans' to share anecdotes, photos and videos of their relationship to your organization. Then, add your organization to Facebook Causes—a part of Facebook devoted to nonprofits and causes attempting to rally support and increase visibility on Facebook. Go above-and-beyond by using a [Chipin](#) widget

⁸ Vargas, Desiree. "GiveForward.org Interview." Telephone interview. 03 Nov. 2009.

to kick off your Facebook campaign, and share donations in real time. Then, call your fans to action with a wall post, note, or message, asking that they and their friends give \$1 or \$5 to the cause.

Twitter: Use Twitter frequently to send quick updates or share news stories involving your nonprofit, its cause or its community. Tools like [Twitpay](#) and [Tweet for Good](#) allow users to tweet their cause and provide a direct link for their followers to contribute—in, of course, 140 characters or less. *Note: For a quick primer on using Twitter, read our [Blue Paper on Microblogging for Business](#).*

Gaming and raffles can also help amp up fundraising efforts through social networking sites. If a Twitter follower re-tweets your campaign-related message, enter him or her in a drawing to win organization- or campaign-specific items like T-shirts or tote bags. Or, give away similar prizes to those who interact on your blog or Facebook page.



Case in point: In early 2009, Critical Exposure (<http://criticalexposure.org/>), a relatively small nonprofit in Washington, D.C, set out to encourage donors to become a powerful fundraising force in their short-term campaign. Using e-mail, Facebook and Twitter, Critical Exposure asked for gifts of \$10 in addition to requesting that followers and fans become fundraisers themselves. The nonprofit even provided sample e-mails, blog posts and Twitter and Facebook messages to post on personal pages or send to friends and family on the nonprofit's behalf. Critical Exposure then regularly updated supporters on fundraising progress with real-time engagement. Over the course of three weeks, Critical Exposure had raised \$15,000 from more than 600 donors.⁹

6. Text or mobile messaging

Relatively new to the fundraising game, text messages are another option available to reaching your nonprofit's fundraising goals. It's estimated that some 3.5 billion text messages are sent and received each day. Of those messages, ones that are sent in attempts to sell a product or ask for a donation, 97 percent of them are opened—that's a higher open rate than e-mail and direct mail solicitations combined.¹⁰

The major challenge of text message asks is facilitating them and enticing donors and prospects to follow through. Your nonprofit will likely have to rely heavily on other

⁹ "How a Small Nonprofit Used Social Media & Crowd-Sourcing to Win the 2009 Global Giving Challenge -." Frogloop Home~Care2's blog for nonprofits - frogloop. Web. 03 Nov. 2009.

<http://www.frogloop.com/care2blog/2009/09/07/how-a-small-nonprofit-used-social-media-crowd-sourcing-to-wi.html>.

¹⁰ "The New York Times Log In." The New York Times - Breaking News, World News & Multimedia. Web. 01 Nov. 2009. <http://www.nytimes.com/2009/09/24/business/smallbusiness/24texting.html>.

communications—like your Web site or social media—to get the word out to prospects and donors first.

Case in point: For a subscription fee, sites like mGive.com and MobileGiving.org enable users to send a pre-determined text message from their phone like “ICARE” or “GIVE” to a numeric code that acts as a phone number. But, instead of the message being sent to a person, a donation is automatically billed to the user’s cell phone provider. Once payment is processed, the donation is sent directly to the receiving nonprofit.



For example, by texting “ALIVE” to 909999, \$5 will be charged to your phone bill and paid to Keep a Child Alive (<http://keepachildalive.org/>), a nonprofit organization devoted to providing treatment, care and support services to children and their families living with HIV/AIDS in Africa and the developing world. In 2008, Keep a Child Alive utilized this fundraising tactic and, through mobile messaging alone, raised more than \$450,000 from 90,000 donors during their summer fundraising campaign. Keep a Child Alive used text messages in conjunction with other tactics and promoted this giving option via its Web site, social media sites, traditional media placement and paid television advertisements.¹¹

A word from Ms. Manners

It is often said in development that the surest way to guarantee that your nonprofit won’t obtain a repeat gift from a donor is to not send them a thank you note following each gift. Many online donation processors generate an automatic thank you to confirm payment—this does not count. Donors should be thanked personally either via a phone call or letter to show that their support was recognized and appreciated. Go one step further and include an update of how their dollars are being used. Don’t forget to recognize donors elsewhere, as well, such as a page on your Web site or in your annual report.

Leave for your honeymoon

Can you feel it? You’re almost there! Follow your timeline and begin implementing your plan once your development team has decided on tactics and channels. You’ll watch as gifts begin to trickle in once you’ve popped the question. Not only will your nonprofit move toward reaching development goals, but all fundraising strategies and campaigns can also serve to maintain connections and relationships with donors.

¹¹ “MGive Case Study- Using Mobile Donations at Televised Events | mGive Blog.” MGIVE Blog :: Mobile Fundraising :: Mobile Giving :: SMS Donations. Web. 04 Nov. 2009. <<http://blog.mgive.com/2009/07/07/mgive-case-study-using-mobile-donations-at-televised-events/>>.

Do it right, and do it well, and don't forget to evaluate your progress throughout the campaign by assessing your situation in reference to achieving goals, along with which tactics and channels are bringing in the most gifts. Measure, tweak, repeat, and you're on your way to fundraising gold and "happily ever after."



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