

# Nine Steps to a Successful Fundraising Campaign

# IMAGINE WHAT IS POSSIBLE



**Lori L. Jacobwith**

For more information or to order a copy of the book visit: [www.lorijacobwith.com](http://www.lorijacobwith.com)

Nine Steps to a Successful Fundraising Campaign - Copyright © 2010 by Apporté LLC. All rights reserved.

For more information, contact..... Lori L. Jacobwith, Communication & Fundraising Strategist and Trainer [lori@lorijacobwith.com](mailto:lori@lorijacobwith.com)



## ABOUT LORI

Communication & Fundraising Strategist and Trainer **Lori L. Jacobwith** has spent more than 20 years helping people and organizations increase visibility & communicate boldly to generate more individual fundraising dollars. Over the last nine years Lori has coached, trained and consulted with hundreds of individuals and organizations across North America. Her fundraising and communication strategies have helped organizations to collectively raise nearly \$90 million.

From 2001 to 2006 Lori delivered numerous workshops in the US and Canada as a senior instructor with Benevon (*formerly Raising More Money*). A high energy speaker who has presented to thousands worldwide, Lori has a mission of creating an environment for people to find ease and joy in fundraising. In 2006 Lori established her training and consulting company Apporté LLC (*ah\_pour\_tay – French for to bring*) to bring people together to dramatically shift communication habits.

Lori has a BA in Political Science and Speech-Communication from the University of Minnesota and additional training through the Fund Raising School at Indiana University. She lives in Eden Prairie, Minnesota and is an active volunteer with organizations supporting women and children.

You may have noticed the definition of the word “with” here and on my web site. My ancestors were given the name Jacobwith when they arrived at Ellis Island, and I have come to see the value of my unique name and what it says about me and who I am for you.

Our work together will help you connect **WITH** the core of your organization’s mission. New ideas can bring powerful transformations, and I pledge to bring you new ideas. Connections come through shared stories, and I will help you share those stories with authenticity and clarity. I am committed to working with you to ensure your success. Together we can make a difference.

So what’s in a name? A lot, as it turns out.

with:

accompanied by:  
*I will go with you*

in relation to:  
*connect with your vision*

having or showing:  
*a woman with ideas*

by means of:  
*transform with new insight*

*"A good coach has you show up in the best way,  
in the best frame of mind, and success flows from there."*

— Lori L. Jacobwith

## **Table of Contents**

About Lori.....	3
Introduction .....	6
Communication.....	7-8
Step One: Leadership .....	9
Story One .....	10
Step Two: Staff .....	11
Story Two .....	12
Step Three: Board Members .....	13-14
Story Three .....	15
Step Four: Goals, Timelines & Urgency .....	16
Story Four .....	17
Step Five: Telling Your Story .....	18
Story Five.....	19
Step Six: Keeping Donors Engaged .....	20
Story Six .....	21
Step Seven: Money Conversation .....	22
Story Seven .....	23
Step Eight: Be Specific .....	24
Story Eight .....	25
Step Nine: Donor Data Management .....	26-27
Story Nine .....	28
List: Nine Steps to a Successful Fundraising Campaign .....	29
Source List & Recommended Reading .....	30

## **Nine Steps to a Successful Fundraising Campaign**

### **Introduction**

Are at least 80% of your annual contributions coming from individual donors?

Are you raising all the funds you can from those types of donors?

Do you have many individual donors who each contribute more than \$10,000 annually to your organization?

If you answered “yes” to these questions, you can stop reading. You don’t need these steps—you’re already living by them! And you are likely generating plenty of contributions from individual donors, even in a challenging economy.

Most social profit organizations I encounter answer “no” to some or all of those questions. The years I’ve spent fundraising myself, and coaching and training organizations to fundraise, have taught me what works and what doesn’t. Of course, there are far more than nine steps for how to keep supporters happy and giving at their full capacity, but the nine steps that follow have been derived from my own personal checklist when deciding to work with an organization. These are critical steps to get your campaign or individual fundraising off the ground and realizing its full potential. These steps will help shift your focus from fundraising as a mundane task that gets left on the back burner to an activity that has you and your entire organization fully engaged—AND generating considerably more dollars from individuals.

I’ve kept the information in each step brief. I know you’re pressed for time—who isn’t? So read on for my short “soapbox” messages on the key areas of fund development that I find are often ignored, forgotten, or simply not being worked thoroughly.

Use these steps as a topic of conversation with your staff and your board. These are important topics—add them as part of meeting agendas, and devote time to discussion and implementation. There are many workshops, books, and coaching opportunities to help you fully flesh out *how* to better work these steps—both my own workshops and coaching, and from others. Some of my favorite source books are listed in the final chapter, and I encourage you to check them out to learn more.

*THE common theme through all of the steps is: **COMMUNICATION.***

Too often social profit organizations assume everyone knows what they need, in terms of money, time, or staff and board involvement. But too often, those assumptions are wrong (and we all know what happens when someone “assumes” something!). Open, honest dialogue with all involved parties in each of the following areas will generate more individual contributions—and it will generate more visibility, clarity of vision, and connection with your community.

I’ve made lots of mistakes in my fundraising career. Big ones and small ones—and I’m proud of them. The mistakes and challenges have taught me more than any book or seminar ever would have. I suggest that the organizations I coach and train take on the job of making new mistakes—just don’t make the same ones I did.

**These steps were designed for groups that:**

- Are already a 501(c)(3) organization and able to accept tax-deductible contributions.
- Have already identified programming and are clear how they make a difference to clients, consumers, or members.
- Are interested in learning how, and are willing, to make changes to become more effective in their individual donor communication.

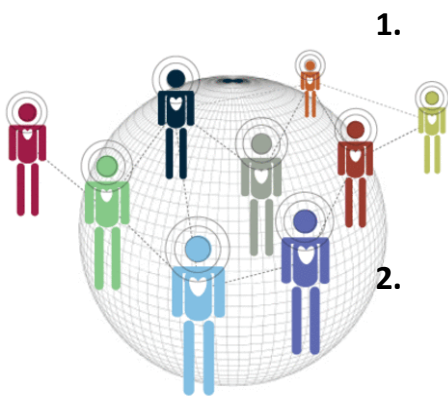
These steps are simple, and you may think you already understand them and are using them. I guarantee that there are subtleties within each one that you can use to strengthen your individual fundraising program and make it even more successful. The most successful fundraising professionals focus on the basics first, then expand into more detailed systems to build their fund development programs—and these steps can be used either as that focus on basics or to move to the next level.

Share this list with your board and your staff, and any other key volunteers at your organization. And please—go ahead, be brave, try things, make mistakes—just make sure they’re new ones!

*One thing, and one thing only, creates a successful individual donor program:  
Clear communication.*

Communication that's powerful and clear is absolutely critical for success.

*I break communication into four key areas:*



1. **1. Sharing Your Story.** You must be able to let the community know who, exactly, your organization serves, and what is missing for you to keep doing your work. Doing this in an emotionally connecting way is what will allow your organization to stand apart from others.
2. **2. Asking.** It sounds simple: Ask people to give their time, talent, stuff or money to support your organization. I consider asking both an art and a science. The person being asked must feel welcome, and they must know what you need. A good “asker” gets a “yes”

often; a great asker rarely has to ask—the other person usually offers before “the ask” is even made. Which are you?

3. **3. Maximizing Relationships.** There are both internal and external people to focus on. External: Communicate with donors with news about your programs and what you’d like to be doing more of to keep them engaged and connected. Internal: Communicate with your board and staff about expectations in terms of supporting your fundraising programs. Take note of how you engage people on your website, what goes into your newsletter and direct mail pieces. No matter how varied the methods, these all ways to deepen engagement and maximize the relationships people have with your organization.
4. **4. Data Management.** Your donor database is as important as the money you have in the bank. How do you track your donor information? Do you have more than one person keeping good records? Is donor communication something everyone is part of? Do you know what your retention and acquisition rates are? Keeping track of donor contacts, whether personal visits, phone calls, board meetings, emails—all of that information is crucial to taking a good development effort and turning it into an extraordinary one.





**Successful individual donor campaigns are led by key volunteer &/or staff leadership.**

*(Board Chair, CEO, Executive Director, President, Pastor, Rabbi)*

I am a firm believer in the power of one person. An effort by one devoted human can make a world of difference in many situations. However, a strong, effective individual donor campaign is *not* a one-person show. To put it simply, the long-term work that must be done to cultivate and maintain individual donors requires a considerable amount

of time. Yes, one person can devote themselves solely to that task—but if the staff, volunteers and board members don't support them with additional efforts, I believe the campaign will not succeed.

If you have the resources for development staff, the CEO/Executive Director and the board chair must be the biggest advocates for that staff. If you don't have a development staff, the CEO and board chair must take the lead in making sure there is a focus on individual fundraising beyond a simple annual appeal and the passive invitations to make a contribution in the newsletter. I believe it is the responsibility of every person within the organization, whether staff, board, or volunteer, to roll up their sleeves and get involved with fund development.

In most of the organizations I come into contact with, nearly everyone shies away from the responsibility of taking care of the donors as thoroughly and carefully as they take care of the clients. Often this is because as a volunteer or staff is brought on board, no one sets expectations for them to participate in development work. Any time someone is brought into the organization—whether as a board member, staff, or volunteer—there should be clear and explicit conversations about what's expected of them.

That might mean soliciting for contributions; it might mean making a financial contribution themselves; it might mean additional volunteer time or in-kind donations; it might mean being on the team that makes personal donor thank you phone calls. Whatever the participation is, that's for your organization to decide. But whatever you decide—make sure everyone knows it.

I've got an example for you. As you read my story examples, don't think I've gone all "Carly Simon" on you; "you probably think this song"—er, story—is about you. It's not. Or maybe it is. These stories are compilations from groups I've worked with, and no real names (human or organization) are used.



### **Story #1: The board supports the programs—in theory**

Beautify the Bronx in New York has a mission of keeping neighborhood streets clean and safe, something they've been doing for 25 years. They're an amazing environmental foundation with a small endowment of \$2.5 million that, like many investments, saw a reduction of 30-40% in the second half of 2008.

Beautify the Bronx has a 13-person board. These are people who love the organization and are thrilled to serve on the board; they're proud to be able to keep their community clean and safe. Recently, a few energetic board members decided that if they could raise an additional \$125,000 annually from the community, the group could nearly double its annual effectiveness. Board members Alicia and Hugh, young professionals in their early 30's, are most in favor of raising additional funds and are not at all daunted by the idea of raising dollars from the community. Sounds like a great idea, right?

And it is. However, no one had ever had a frank discussion with the long-time board members when they joined to outline what the expectations were in terms of them being involved in fundraising. The very mention of the word "fundraising" causes sweaty palms and queasiness for some. In fact, some of the board members have never made a financial contribution to Beautify the Bronx themselves. As far as they were concerned, the organization has an endowment generating interest, so why should they make financial contributions?

I was brought on to help this group. Within a few months, we determined that they'd need to do some thoughtful work with the board before launching a fundraising campaign. Part of launching that campaign meant hiring a staff person, part-time, to spearhead the effort. But because so much time has passed since Alicia and Hugh proposed raising funds, they are no longer as excited about the idea, and the endowment has declined to the point that they're now in desperate need of individual donors.

The board is proud of the group's accomplishments—but pride alone will not generate financial contributions to allow the group to continue doing its valuable work. Beautify the Bronx has instead decided to pare back the grants they award for the time being and do some work getting the board more engaged in individual donor fundraising before they launch their \$125,000 annual campaign. They are moving slowly, but they are moving forward to shift internal thinking and fear through ongoing communication.

The good news is: the discussion about fundraising has shifted. New board members are being brought on into an environment where there is a clear expectation that financial contributions are made by the board members, and donors are being kept in touch with at a much more personal level. All of these changes are setting the stage for a successful individual donor fundraising effort – when the time is right.



**Successful individual donor campaigns are supported and managed by at least one staff.**

For a smaller organization, the sole fundraising staff might be the executive director. For larger organizations there may be a team that includes major gifts officers, grant writers, data base managers and other positions.

I work with many smaller organizations that are in the infancy stage of generating gifts from individual donors. In the early stages of developing an individual fundraising program, effective executive directors enlist and encourage board members, new donors, and community volunteers to help with solicitations, letter writing, follow-up phone calls and emails, and any other activities that create more connection and commitment from the donor to the organization.

One of the challenges facing many social profit organizations of any size is the limited lens of sharing only the good news. Being able to provide valuable services and programs to the community never comes free. Many groups I've worked with frequently make the mistake of putting all their resources into programs, even to the point of allocating funds only to that, and none to fund development. The problem with that is clear:

**No funds coming in = no new programs going out.**

If your organization is serious about continuing to provide services, bringing a fund development staff member on board must be one of the highest priorities. Just as clients must have someone managing and delivering the programs that provide services and make your organization so amazing, so must your individual donor program have a person to do the work of keeping your message relevant and visible to the community.

It's tempting during economic downtimes to reduce or cut funding staff altogether. But that very short-term solution will create long-term problems.



## **Story #2: I'll do it. All of it.**

I get to work with visionary, inspiring men and women who are often founders of their organization. I am often amazed by their dedication and their fears. A few years ago I met Martin, founder of a choral group for people of all ages who want to gather regularly to sing. The Song Birds, a dedicated group of 26 people, ages 18 – 80, perform a few times a month for seniors, schools, businesses, anyone who invites them. Their annual budget is less than \$50,000 for costumes, travel, small stipends for the singers, and virtually no salary for Martin.

The Song Birds receive small grants from a few foundations each year and a handful of contributions (from less than 50 individuals) because they have created a musical curriculum for children with autism that has proven highly effective. Now they are being asked to perform more often to work with groups of children with autism by organizations that can't pay anything. With the demand growing and dollars stagnant, the Song Birds brought me in to help develop some systems around raising money from individuals.

The first thing we agreed on is that Martin SHOULD be receiving a salary. Doing all that he does and struggling to make ends meet is a disservice to the amazing healing work. I pointed out that Martin was only telling people about all the great work being done and not sharing what more COULD be done.

He wasn't talking about the size of the budget, nor did he tell people how much it cost per performance. Frankly, he realized he didn't know how much each performance cost. Once we determined performance costs, Martin began, slowly, to share key information. He began to invite support from his community and found people willing to volunteer to send out messages in print and via email that began to raise awareness about the needs of the organization.

Over the last three years the Song Birds have increased their annual budget from less than \$50,000 to nearly \$250,000 from individual donors by talking about money in a clear way. Being more transparent about their needs AND their powerful work has generated more than 300 new donors—an amazing outcome to increasing the frequency and clarity of their communication. They've added more than 100 volunteers to the team.

Now people see a place for themselves and a way to be of help so Martin doesn't have to do it "all."



**Successful individual donor campaigns have *all* board members participating in fundraising in some capacity (*and I don't mean the "Hey, you're doing a great job" cheerleading role*).**

Being a board member is not just an honor to bestow on people who show up at meetings. Board seats are critical to the financial success of your organization.

I can just feel some people squirming as I write this.

I can read your mind, too: “But Lori, you don’t know *my* organization—my board can’t/won’t agree to that!”

Are you sure?

The reality is, without FULL board participation and a clear understanding of the fundraising program, your work as an organization is far more difficult.

How do you get the board to support your fundraising work? Start with an expectation and accountability discussion. When the board members started their term of service, were they told directly that being a part of fundraising and fund development is expected of them? Was their role clearly defined? And do you have one or more advocates on your board who will strongly support your efforts to get all the board members, well, “on board”?

Here’s what I mean: In the interview process, it’s critical that both fundraising (the raising of assets) and fund development (raising of visibility and deepening engagement) activities be thoroughly discussed and outlined. New board members must know beyond any doubt that they will be included in the “doing” as well as the giving.

A frequent mistake that I see is that the development staff doesn’t know—because they haven’t discussed it or created a plan around it—what they want from the board, so the board is left to figure it out on their own. It’s as if you want me to know how to scuba dive because I love being in the water, but no one ever takes the time to teach me to do it.





That's not to say that board members have to spend all their free time directly asking for financial contributions. Here's a short list of things that a board member or key volunteer can do to assist your organization in maintaining deep, connected relationships with donors, and they do not *ever* have to ask someone else for a financial contribution:

- Make phone calls to donors to thank them for their recent contribution.
- Invite donors, volunteers, community members, family, friends, colleagues, and others to your events, including the “get to know us” type of events that are free.
- Take a current or former donor to coffee to thank them for their recent gift. Obviously it's not practical to take every donor out; set a minimum donation goal for this type of activity.
- Make an introduction to the community affairs person at their workplace.
- Give a heartfelt—but short—speech at their church or civic group to invite interest in your organization.

In fact, the first item—make thank you phone calls to donors—is not just a nice gesture, but I believe it should be a required part of every board or development committee meeting. It only takes about 10 minutes; give everyone one or two donors to call (make sure a staff member does the first one, so the board can see how it's done). Remind them to take notes for your data management system (more on that later). They might be nervous about it at first, but quickly they'll find it IS fun and rewarding. Donors are always pleased to be singled out for thanks in such a personal way. I've watched people with sweaty palms dial their first call, have a lovely short conversation with a passionate donor, then turn around and ask for more names because they enjoyed it so much!

This is only a short list of the many ways board members can actively participate in fund development activities. Whatever role they play, staff and board must be clear and specific about expectations. Then staff assists by providing data so that board members can hold themselves accountable. Discussion of these metrics may cause great strides in your keeping donors connected and engaged.



### **Story #3: My board won't help with fundraising.**

This is one of the comments I hear the most often. I've become a bit of a skeptic about this statement because when I enter the picture and begin to work with the board what I often see are passionate, committed professionals who are waiting for some direction and specific tasks so they can do their volunteer work better.

The Full Shelf Food Bank invited me to do three board sessions of three hours each with an outcome of more deeply connecting the board and some of the staff with their fund development efforts. The staff assured me that there would be lots of push back and to not have too high of expectations of the board.

I did my "prep" work with the board chair, Todd, and found him to be excited about the upcoming sessions. He offered to be my partner in whatever way I needed. He agreed to move things along at the sessions when there were exercises that required board discussion and he would help to keep people accountable to be on time and show up.

When I asked Todd about what he thought the reason was that the board wasn't helping with fund development and fund raising activities in an engaged way he said, "Lori, we don't know what to do. Most of us don't know how to or want to talk with our friends about money. We are uncomfortable with those types of conversations."

I paused and said, "Todd, I understand that hesitancy. What if there was a way to be involved in keeping donors connected to Full Shelf without having to ask for money?" Now I had his attention. "Go on." He said. "Would you consider making phone calls to invite donors who have made a recent contribution to the Full Shelf Food Bank to help out at your annual Thanksgiving box packing days?, I asked .

Todd's eyes lit up. He nodded and said, "If I could call people who've already made a contribution, I'd feel much better!"

So I took it one step further and asked, "Todd, did you know that the staff makes a personal phone call to every donor who contributes financially to Full Shelf? That's more than 2600 phone calls each year. And if all of those donors actually received a personal thank you phone call their next contribution may be higher?"

Now Todd was really excited about the possibilities. So I asked, "What do you think about taking 10 minutes at each board meeting to have the board make some of those calls? That's the kind of work that can be done to help with fundraising and assist the staff in the work of donor cultivation."

Todd's response was, "Let's start those phone calls right during our sessions with you! I'll explain to everyone why we're making the calls and I bet they'll be as excited to help as I am."



Sure enough, we made two donor thank-you calls at each of the three fundraising sessions. At break time everyone got on their cell phones. Some people left voicemail messages, and others got a real person on the line. The energy in the room was totally different each time we made those calls. Now, at the Full Shelf board meetings each month, the 14 board members make two thank-you calls, which is a whopping 28 donor thank-you calls made in 10 minutes.

This activity generated more contributions and more engaged donors. More board members are inviting people to Full Shelf events, and some of the board members have even offered to meet individually with key donors to engage them more deeply. It's been a total turn-around in the board engagement.



**Successful individual donor campaigns have a well-defined goal, with a specific timeline, creating a sense of urgency.**

#### Set Goals – and Tell People About Them

All organizations have specific financial goals for what they need to raise each year. For some, those dollars come from corporations and foundations, and they have only a tiny amount they raise from individuals each year. Others are totally dependent on hundreds of thousands of dollars from individual donors each year. I've worked with one organization that has more than 50,000 donors giving annually, with donations ranging from \$5 to \$100,000. But they have a retention rate that is less than 25%. I know—you'd like to have their problem. But it is a problem—having to recruit 75% of their donations from new sources each year is time-consuming and costly.

How do you keep your current donors connected so they keep contributing?

It's important to let your supporters know your goal for the year—at the beginning of the year. Then keep that goal visible in a variety of ways: your website, your newsletter, email updates to special groups of "insiders," one-one-one meetings, staff meetings, civic meetings, the board meeting, everywhere. Wherever you can share the goal and timeline, share it in fun, engaging ways.

It can be helpful to breakdown the goal into smaller mini-campaigns to keep the sense of urgency. If you need to raise \$250,000 from individuals this year, by year-end, be clear how much you must raise by June 30. Then keep that message visible for the full six months. Be clear about what you'd like to be doing more of or where there are some budget issues, but share those examples through stories about the real people you serve.

And don't wait until the final quarter of your fiscal year to rush out and tell donors that you have not met your goal. Let your stakeholders know throughout the year how things are going. Tell them what you don't have enough of, which is usually money. But if you're talking only about money and not the people whose lives you are changing, donors tune out.

It's amazing what a difference giving specific dollar amounts will make, especially when combined with the stories of real people.

And key to all of this is keep your messages clear and concise. For email my recommendation is 250 words or less. I didn't just make that number up. It was the guideline used by the Obama presidential campaign for many of their email fundraising campaigns. The campaign raised more than \$700 million and is a good indication that shorter is better.





#### **Story #4: We Need Money NOW**

In April 2008 a great organization, Ready Set Go, working to provide employment training for people who've lost their jobs, found themselves in an economic crisis. Their cash reserve had been dissolved while waiting for some grants to get approved. When the grants were declined, there simply was not enough money for more than a month's payroll.

At a fundraising meeting with key leadership and staff I asked the question: If we need money that badly, why are we not asking? As it turned out, Ready Set Go had never done a spring appeal, nor do they reach out via email to invite their supporters to make a financial contribution other than in December at year-end. Their emergency goal was to raise \$40,000 to get them to the fall when more dollars would be coming in.

We cooked up a plan: Four email messages, one direct mail letter, a phone bank, and a follow-up email message to report on how the campaign had done. This communication was spread out over 2 ½ months from the end of April to mid-June.

The good news is Ready Set Go has more than 4000 supporters in their database. They had current names and email addresses for many of their volunteers, community partners, donors, vendors, community leaders, family members of clients, and so on. In short, they had a great list.

##### **Our rules were:**

- Short, 250-word or less email messages that would include a short story about a real client.
- We provided specific examples of how a contribution would make a difference.
- The communication was sent out every other week.
- Each message had more than one link to Contribute NOW on their website.

The first email message generated a few hundred dollars from four people.

The second email message generated nearly \$6000 more.

The third email message brought the total to over \$11,000 and much of this was from new donors.

In week six, the direct mail message dropped and money was flowing in. Small amounts and not so small amounts. In week seven the phone bank was conducted, the totals reached nearly \$80,000 – double the original goal! Cash flow was no longer an issue.

The last report I heard was that the organization reached more than \$100,000 in contributions and nearly 75% of that was “new” money. The plan is to never go back to only asking for individual donor contributions in the fall but to always have a spring appeal that is “multi-channel,” which means using multiple forms of communication to make sure donors and volunteers don't miss the message. AND the organization is making strides in keeping their goals about what their vision is for the future front and center in their communication.



**Successful individual donor campaigns create an emotional connection – making it personal for people to participate.**

**Make Me Care**

This is where storytelling comes into play. And by storytelling, I mean using real life examples of the impact and value of your work. Your goal is to cause the person listening or reading to feel something. And that feeling may translate to having them care enough about what you are doing that they realize they can't sit by the sidelines watching and doing nothing. You can share pages of statistics about the increase in

homelessness due to the economy OR you can tell share a short example about Marcus, a 52 year-old man who got "downsized" from his sales job who now works as a cashier at SuperAmerica. He can't pay rent any longer and has nowhere to live. Sometimes he uses a homeless shelter, but if they're full, he sleeps in his car. He uses the sink at work to keep himself clean, but it's a strain and he always feel ashamed about his current circumstances and barely looks people in the eye at work each day. Then tell how your staff and volunteers have helped him find some dignity and are working with him to find a place to live and a better job.

Which approach will be more successful, the statistics that will make their eyes glaze over, or the haunting story of a man trying to make it in a tough world? Someone they might see when they stop for gas?



Where do you share the stories? Everywhere.

Start each staff meeting with someone sharing a two minute example of why you are all proud to work at your organization.

Begin board meetings with a board member sharing a story that they learned from phoning a staff person or visiting one of the sites where you provide care. Make sure though that the board members know in advance of joining your board that they will be called on in a rotation of all board members throughout the year to share a real story.

I'm amazed at how many organizations don't share a story on the contribution page of their website. A photo and short example of a how life is different for someone in your community because of your work WILL generate a deeper connection and may generate a larger gift.

Newsletters, at special events, at donor stewardship meetings, at volunteer recruitment gatherings, the list goes on.

People are looking to "feel" something and you've got the magical opportunity to cause them to feel something whenever you are in contact with them. Remember, your board, volunteers and donors do not regularly come into contact with real life examples of the children, men and women you serve.

## Nine Steps to a Successful Fundraising Campaign

The very best way to share a story is for the person who it's about to tell it. But live testimonials don't always fit into the agenda or timeline. So start strengthening your story telling muscle to tell and write short, compelling examples of your work.

An important note: Use the two minute rule. Minds start to wander quickly so keep your story telling and real life examples short and packed with an emotional punch.

No matter how large your goal is—whether it's to stop hunger in Africa, lobby for more education funding, educate poverty-stricken children all over the U.S., or preserve crumbling artworks in a small-town museum—drill down to the story of one: one person, one animal, one saved masterpiece—one specific instance. With just one, you've got far more opportunity to build that emotional connection, because your supporters can then visualize the example you are sharing.



### Story #5: Real Stories

Here are a few examples of varying length stories that cause me to feel something. Do you?

*"John's home has a steering wheel."*

~

*"This ad is getting more attention than 5 year old Jacob."*

~

*"Adhel is a 32 year-old mom who recently moved to Minnesota from Sudan. She is grateful that her 4-year old twins, Emanuel and Patience, can attend our preschool while she learns English right down the hall. Her entire body beams when she describes how her twins show off their knowledge of letters and numbers at dinner recently."*

~

*"In her early thirties, Danita left a physically violent situation with two young children ages 3 and 7. She took with her only a few items of clothing, a broken arm and a black eye. Her son, LaShawn and daughter, Malika, didn't understand why they couldn't take their toys or why they had to rush out of the house. When I first met Danita, she whispered words that described her shame and her feeling of utter failure of living in an empty apartment with her children huddled on the floor sleeping with only their coats to cover them. Knowing there was no extra money in the immediate future to purchase furniture even from a thrift store Danita was near tears when someone at a nearby church referred her to us.*

*With the furnishings they were able to pick out on their one-time only shopping expedition to our "store" Danita and her children now share meals at a table, organize their clothes in a dresser and use the sleeper sofa to gather for Friday night movies. **HOPE for a better future** has become part of Danita's vocabulary.*



## **Keep donors and interested parties informed and engaged.**

In other words: Don't stop Communicating!

You've told your story about Danita to the community. You struck a chord, and donors have sent generous contributions (for which you promptly thanked them in a heartfelt way). Now what? Are you finished?

Of course not. You know you have their interest—now it is up to staff and key volunteer leadership to keep that supporter connected to your organization. But how do you keep them engaged and wanting to know more?

As a staff person, think about how many times a day you hear about a client and what they need or how someone's life is better because of your organization. Did that family finally get to adopt the child they have been waiting five years for? Was Sonia able to get a job because your staff has been supporting her and assisted her with child care during the day?

The truth is, the outside community and even some of your key leadership do not hear all of those updates throughout the day. They are removed from the day-to-day connections with the real stories of real people being served.

Our job as staff is to help keep the impact of our work and our real life stories visible and near the top of people's minds. There is always something to share. Ask yourself, what's changed? Has some new crisis occurred? Is a call to action needed? Even if it appears that nothing has changed on the surface, dig deeper. Maybe the incoming contributions have helped expand homeless services so Marcus no longer sleeps in his car. That's huge news! Tell people. Lots of people! Or maybe through an unfortunate bit of economic timing, a large employer has shut down, and now you have more people lining up for your services. Let people know that too.

The key is to keep the information flowing—direct mail, email, phone, websites, Facebook, Twitter. Staying in touch has never been easier. And yet, some organizations still just end out their annual appeal, one follow-up thank you letter, and they're done for the year. Meanwhile, the people who have invested their dollars in your work are no longer engaged. Your work is not top-of-mind for them and in fact, they forgot why they ever thought your work was important. They may have forgotten why their contribution was important in the first place.

Keep in mind that frequent communication doesn't mean lengthy communication. Short, punchy monthly messages that tell specific stories or news events keep your work relevant and top of mind. Your messages must share the fact that you're actively working on your mission.

If you haven't been communicating regularly, it's OK to start now.



Keep in mind two things with your communication:

1. Make sure people FEEL something when you communicate.
2. Make sure people learn something new about what you do and how you use the contributions they give you.



### **Story #6: Keeping Donors Informed & Engaged**

In the last quarter of 2009, I received nearly 20 appeals for year-end contributions. I'd already made a contribution to seven of those organizations earlier in the year and wasn't sure I'd give more, but was considering a gift to some of them. I was surprised to receive appeals from the others; I hadn't contributed to them for years—and I hadn't heard anything from most of them since the last holiday appeal.

I was disappointed to find that I was not moved, inspired, or informed by much I read in those appeals. One especially frustrating experience I had was when I was sent three separate emails in the last week of the year, pleading for a year-end gift. Since we had no previous relationship, and I had no idea what their goal was or how close they were to achieving it I simply deleted each message. They told me three times that they really “needed my help” but not why. Nor did they connect me with a real life example of a person who received their services to compel me to give.

The gifts I made at year-end weren't large, but they were a stretch at the end of a year when I'd done more charitable giving than I've done in a long time. I received the typical form thank-you letters, but I also received one heart-warming phone call and special handwritten message. You can bet those two more personal contacts made a deep impression—and a positive one—on me as a contributor.

After really thinking about these appeals, I decided that in the future I will be very conscious about where my gifts go. I've decided to give to organizations that keep in touch with me and let me know how their programs are doing. I've reduced the number of organizations I support so I can give more to the ones who keep me informed and remind me I'm making a much-needed difference.

I'm certain I'm not alone in the changes I'm making in my giving.



**Keep the money conversation visible: in print, on website and via multiple forms of communication to allow transparency and encourage widespread participation.**

Keep All Eyes on the Goal

As I shared in Step #4, you want to set your goal and make sure everyone knows about it throughout the year. But just as overall communication needs to keep flowing, so does the progress—or lack thereof—towards your goal. This is not just about communicating with financial contributors, but with everyone connected to your

organization: board, staff, volunteers, corporate and foundation funders, elected officials, vendors, civic groups, media, former staff and board, the list should be long.

Once you've created your annual fund development plan for the year and set your fundraising goals, report on your progress as agenda items for staff and board meetings, with short fun updates in newsletters, at other gatherings and even one-on-one meetings with stakeholders.

The goal should be publicized everywhere you can, whether it's through a direct-mail campaign, email campaigns, your website, your Facebook page, Twitter updates – use every channel of communication available to keep your goal and progress visible. As you receive financial contributions, be sure to continually update the goal so those who have made a gift can feel great about seeing the goal shrink. If you're having trouble reaching your goal, please talk about it. Be honest, clear and share updates about the status of your campaign. Make sure your donors see there is a place for themselves.

It often helps to break down a goal into bite size chunks each month or quarter. Sharing both the goal for the number of donors AND dollars will help you actually reach the goal.

If you are falling short of the goal, let people know what steps you've taken to reach it. Be honest about how far you are short, and invite people to help. Don't assess blame, but don't hide what's happening. You'd be surprised how many people who have already contributed will step up again when they know what's at stake.



### **Story #7: Money Conversation**

You learned about the organization Ready Set Go in Step #4. The success they created with their multi-channel effort is largely due to the fact that they kept their goal AND the results they were experiencing in front of their audience throughout the campaign. And most importantly they invited help when they needed it.

Each message that was sent via email reported how many people had made a contribution so far. Their communication reminded us of their original goal and what was left to raise. There was information on their website that tracked the success of the campaign and they talked about the progress in person, at meetings, in their newsletter, at volunteer gatherings, everywhere.

When people started to see that they actually might exceed the goal, gifts came flooding in. They raised three times the original goal and learned a valuable lesson: Tell people what you need and why. Humanize the need. Put a face and a name on it and share that information often.

Two surprising outcomes to that campaign: More than 75% of the gifts came from **NEW** donors and many people gave more than once.

Wouldn't you like results like those?



**Invite participants to do very specific things with a deadline for doing them.**

You can't be too specific when it comes to communicating about your organization's needs and goals. Far too many appeals go out asking individuals to "help" an organization without explaining what the "help" can accomplish. That's rather like my niece coming to me and saying, "Please buy a chocolate bar." I'll buy the chocolate bar, because she's my niece—but if she told me that the money raised would help five students be able to afford to attend band camp, maybe I'd buy more than one bar; maybe I'd buy the whole box.

**There are two areas where being specific is necessary:**

- 1. How much.** What do you need? Dollars, yes, but how many? It's true that not everyone will give equal amounts. Let them know your specific goal (an annual campaign to raise \$1 million or an emergency effort that requires \$25,000), then give options and create mini-campaigns within the larger campaign. Shorter timelines can create a sense of urgency.
- 2. How will you use the money?** What difference will it make? Really make? In terms of real live people how will the money make a difference? Be specific. Tell a story to make this real for people.





## **Story #8: Be Specific**

*Dear Lori,*

*As a longtime donor you know that we work hard to ensure our resources go directly to support victims of domestic abuse and we keep our overhead costs low. When the recent thunderstorms produced rain inside some of our rooms where anxious mothers and children meet for group therapy to help them rebuild their lives, we concluded this was an "overhead" expense we couldn't ignore. We are inviting you to help us with this unexpected "overhead" expense.*

*Please help Raise the Roof!*

*Our new roof costs \$25,000. That's 1,000 shingles at \$25 each. If 1,000 supporters each add a shingle, we're snug and dry for the winter! Or, if 250 of you add 4 shingles each. Or.....you get the idea.*

*But, wait! There's more!*

*On Tuesday, November 17, beginning at 8 am, all contributions to our organization through [www.GiveMN.org](http://www.GiveMN.org) will count towards matching funds. So, 2 shingles can become 3. Ten shingles become 15. And your investment will go farther than on any other day!*

In this example people were invited to help in a big way or a small way and help women and children who've been abused receive the treatment they truly need. Any time a vivid picture is painted for what difference a contribution will make interest and connection is created.

No matter how much is contributed, another easy way for people to help is to invite them to forward the information on to others who may be interested. It's likely that if this is an important cause to the person receiving the message, they may know others would find it important. Word of mouth is powerful and FREE! Finally, as more and more people move toward online giving, make your website easy to navigate, and your donation page compelling and easy to use.

The image cannot be displayed. Your computer may not have enough memory to open the image, or the image may have been corrupted. Restart your computer, and then open the file again. If the red x still appears, you may have to delete the image and then insert it again.



**Utilize a web-based donor data management system to allow others to assist with tracking donor contacts and gifts.**

I believe your data is as important as money in the bank.

Some organizations might already be doing the first 8 steps, but they fall apart when it comes to **#9: donor data management**. In the early days, organizations start out keeping contribution information in a spreadsheet or some other homemade system, and for a very small organization, that works for a while.

Eventually, spreadsheets become cumbersome, limited in functionality and you'll have multiple versions of the same data or many spreadsheets that capture tiny bits of information about those investing precious dollars in your work.

You might be thinking, I have plenty of functionality with our lists. If I have a list of the names, contact information and contribution history for my donors, isn't that enough?

Not really. A good web-based donor data management system makes it easy for key staff and volunteer leadership to enter information about their contacts. All of the contacts: in person meetings, phone calls, events attended and more. Allowing more data to be entered creates a depth of institutional data that can uncover thousands if not millions of dollars waiting to be giving to your organization. Being vigilant about entering contact information can allow much more thorough tracking of fundraising prospects and avoid duplication of contacts, such as thank-you calls.

Your system is only as good as the information you put into it.

A system should allow efficient management of pledged donations, interests, groups the donor or volunteer is associated with, relationships the donor or volunteer has with others in your organization.

It's virtually endless what can be tracked once a data tracking system is being used to its fullest potential. As time goes on, you'll begin to see patterns in how people contribute both their time and their financial resources. You'll see whether they prefer once a year, or how they respond to direct mail or emails; if they always donate the same amount, or if it varies (hopefully increasing!); if you send emails with links, you'll be able to see which donors opened the email and which of the links they clicked on, allowing you to better tailor your appeals.

I recommend web-based systems because they make it easy for lots of people to enter information. Say for example: The volunteer team didn't know you were speaking with one of their long-time volunteers about a financial contribution and they may have critical information to help you secure that gift. A system where everyone is trained to enter their contacts is invaluable in mining for deeper commitments from your supporters.



Due to the efficiency of what you know about your data when you use a web-based data tracking system it's almost like adding a part-time person to the team.

**Here are a few of the questions about data I ask of the organizations**

**I work with:**

- 
- - Who has given for multiple years?
- Who has given at \$100+? \$500+? \$1000+?
- How many times have you been in touch with those donors by mail? Email? Phone?
- When was the most recent contact and by whom?
- Who at your organization knows those specific donors or volunteers?
- Who gave to you last year but unfortunately not yet this year? (LYBUNT)
- Who gives some years but unfortunately not yet this year? (SYBUNT)

Just asking those questions can often put an organization into the feeling of overwhelm and fear about their data because they don't know the answers or even how to get the answers. Or the one person who has access to the database is on vacation or too busy to pull a report that will provide the answers to those questions.

Segmenting your communication to your community helps them feel connected. Your database can help you appear to remember many details about your supporters that may ultimately cause them to give more.

*"Fundraising is deep profound relatedness"* as Lynne Twist, author of *The Soul of Money* says. The more you know about each other the more meaningful the relationship can be.



### **Story #9: Data Mining**

We sat down with a contribution list of people who had made gifts of \$5000 or more over the last 5 years to the Community Arts Fund in a small community in Ohio. I asked who was the most passionate supporter on the list? Cliff, the executive director said it was a man named James who had passed away a few years ago. We continued to review the contribution list and we came across the name of someone who had given nearly three years ago but not yet this year. (The SYBUNT category.) The contributor, named George, was James' best friend.

George had made his gift because his good friend James had invited him to do so. He'd had a few interactions with staff and board at the Community Arts Fund but events but no one had really spent much time with him. And yes, he continues to be a man of means, retired and supports other arts organizations.

A meeting was set with George. Delightful conversations were had. Advice was sought about how to finish off an endowment campaign that was critical to the Arts Fund. George not only eventually made a \$25,000 gift to the campaign, he agreed to spearhead the efforts to wrap up the campaign. Last count over \$100,000 has been generated by George's efforts. And six months ago he wasn't even on the radar.

All this from simply taking the time to review the contribution data! The Community Arts Fund actually has a web-based donor tracking system that had been well tended with details about the relationship between George and James. Stopping to ask the questions about real people made a huge difference because the information was readily available. Is that kind of information about your supporters available at your organization?

**That's it!** Nine steps to a successful fundraising campaign. I hope you now see ways to shift the communication at your organization.

**My suggestions:** Choose one area to tackle at a time. Talk about the people whose lives are different because of your work. Talk about the MONEY. Please.

Your supporters and those waiting to support you will thank you! I promise.



## **Nine Steps for Successful Fundraising Campaigns**

- 1. Are led and supported by key volunteer and/or staff leadership.**  
*(Board Chair, CEO, Executive Director, Pastor, Rabbi)*
- 2. Are supported and managed by at least one staff.**  
*(Development Director, Dev. Associate)*
- 3. Have ALL board members participate in some capacity.**
- 4. Have a well defined goal, with a specific timeline, creating a sense of urgency.**
- 5. Create an emotional connection – making it personal for people to participate.**
- 6. Keep donors and interested parties informed and engaged.**
- 7. Keep the money conversation visible in print, on website and via multiple forms of communication to allow transparency and encourage widespread participation.**
- 8. Invite participants to do very specific things with a deadline for doing them.**
- 9. Utilize a web-based donor data management system to allow others to assist with tracking donor contacts and gifts.**

## Source Books & Recommended Reading List

### Money

*The Soul of Money*, Lynne Twist, W.W. Norton & Company Inc., 2003.

*The Trance of Scarcity*, Victoria Castle, Sagacious Press, 2006.

*Creating Affluence: Wealth Consciousness in the Field of All Possibilities*, Deepak Chopra, New World Library, 1994.

*The Energy of Money: A Spiritual Guide to Financial and Personal Fulfillment*, Maria Nemeth PhD., Ballantine Wellspring, 1999.

### Fundraising

*Donor-Centered Fundraising: How to Hold On to Your Donors and Raise Much More Money*, Penelope Burk, 2003.

*Yours For the Asking: An Indispensible Guide to Fundraising & Management*, Reynold Levy, President, Lincoln Center for the Performing Arts, Wiley & Sons, 2008.

*Forces for Good: The Six Practices of High-Impact Social profits*, Leslie R. Crutchfield & Heather McLeod Grant, 2009.

*Raising More Money: A Step-by-Step Guide to Building Lifelong Donors*, Terry Axelrod, RMM Publications, 2000. Can be ordered from the Benevon website: [www.benevon.com](http://www.benevon.com)

*The Relentlessly Practical Guide for Raising Serious Money: Proven Strategies for Social Profit Organizations*, David Lansdowne, Emerson Church, 2005.

*The Mercifully Brief Real World Guide to...Raising Thousands( if Not Tens of Thousands) of Dollars with Email*, Madeline Stanionis, Emerson & Church Real World Guides, 2006.

*Asking: A 59 Minute Guide to Everything Board Members, Volunteers & Staff Must Know to Secure the Gift*, Jerold Panas, Emerson & Church, Publications, 2009.

*The Spirituality of Fundraising*, Henri J. M. Nowwen, Upper Room Ministries, 2004.

### Business

*The E-Myth Revisited: Why Most Small Businesses Don't Work and What To Do About It*, Michael E. Gerber, 1995.

*Good to Great and the Social Sectors*, Jim Collins, 2005.

### Story Telling

*Not Quite What I Was Planning – Six Word Memoirs by Famous & Obscure Writers*, Edited by Smith Magazine, Harper Perennial, 2007.

Andy Goodman, 2006 keynote address: *Storytelling as Best Practice*.  
<http://video.google.com/videoplay?docid=-289257716014946841#>

### Donor Database

Trail Blazer Campaign Services, Inc.  
[www.trailblz.com](http://www.trailblz.com)