

Basic Elements for Effective Donor Communication

- Determine your goals in communicating with donors. Make certain that the corporate culture is conducive to these goals, including the commitment of human and other resources to the process.
- Based on past (if applicable) successes and frustrations, determine the methods you will use to communicate with your donors. Include donors as one of your most important publics when developing more general communications plans.
- Gather and maintain as much information about each donor as possible. This ensures appropriate and individualized communication.
- For major donors, develop a strategy for each donor, including personnel assigned, other resources required, and timelines.
- Involve volunteers as you can. Make sure that volunteer training is included, and that duties and boundaries are clearly stated.
- Ensure systems for quality control, communications tracking, follow-up (including financial accounting and receipts), and donor recognition.
- Keep in mind that donor communications are a long-term need and function within your organization. A strategy should be approached from this vantage point. Success will result from the ability to work the plan on a consistent and on-going basis.

A Summary of Pointers...

- ⇒ Know yourself, be the one that/whom others want to know, know your donors
- ⇒ Get organized
- ⇒ Strictly limit the number of messages you attempt to convey
- ⇒ Keep your writing short and simple; make sure it is easy to read
- ⇒ Be sure to use logic and emotion effectively
- ⇒ Be compelling; set yourself apart (differentiate yourself from the competition)
- ⇒ Use visual images to powerfully convey what words cannot

- ⇒ Choose the right mode of communication to carry your message
- ⇒ Always provide your donor with an answer to the question, “So what?”

Making the Ask

Your job is to ask for and secure contributions from your list of prospects. This job has four important components.

1. **Inform the prospect** - Know the campaign story and convey to the prospect the importance of the campaign to you and to the future of the organization and the industry.
2. **Cultivate the prospect** - Listen to your prospect and establish an atmosphere of shared concern and constructive communication.
3. **Raise the prospect's sights** - Inform the prospect of recognition levels and named gift opportunities, tax benefits, ways of giving, and other factors that influence a gift.
4. **Ask for a thoughtful, appropriate commitment** - When you determine the time to be correct, invite the prospect to commit to an amount.
- 5.

Points to Consider When Soliciting Gifts

- See your best prospects first. Start with the prospect you believe will respond most favorably. See your prospects in person. Phone personally to set the date and time for your visit.
- Plan to engage in ongoing cultivation, and two or more visits for the solicitation. You must convey the attitude that you are committed to this project, and that it is very important to you to involve the prospect in this community of giving.
- In order to secure major gifts, you must ask! You also must believe in the evaluated figure to be solicited. This “considered amount” is an estimate of what prospects will contribute when they are sufficiently motivated. It is only a measure of potential, not a price tag or what they should give.

I hope you'll consider a gift of \$X over a period of three to five years.

I hope you will join me as one of the \$X gifts this campaign requires.

I saw myself at the \$X level. Is that where you see yourself?

Others will stretch only if we, as leaders, stretch first.

- Our goal is to never offend the donor. In some cases we may have to accept a “substandard” gift, but always leave the door open to come back at a later time.
- In a nutshell: Be prepared to articulate a sound case. Make a brief, clear and concise presentation. Ask for a specific, reasonable and challenging gift. Listen. Demonstrate your own commitment Fundraising by the Board of Directors

Why do Leaders Serve on Boards of Directors?

- The right person asked
- Pride of association
- Responsible concern for community
- Your organization's cause

Attributes of a Good Fund Raising Board

- Influence
- Affluence
- Credibility
- Respect
- Outreach
- Business Expertise

The Board Role in Fund Raising

- Planning
- Outreach and Advocacy
- Recruitment
- Charitable Giving
- Committee Work
- Solicitation

Practical Ways to Engage the Board in Meaningful Fund Raising

- Treat as You Treat Other Volunteers
- Provide Structure
- Create Environment for Success
- No Unnecessary Meetings
- Have and Clarify Expectations
- Make Sure That Members Know the Product/Benefits
- Provide Effective Training
- Provide Effective Tools

Keep in mind that 88% of people are willing to volunteer for our organizations, yet half turn away because they do not feel welcome, that their work is not meaningful, that there is no structure for their involvement, etc.

Note: Modify to list the specific areas of fund raising activity with which your organization is involved.

Board of Directors Fund Raising Interests Form

	Like/ Will Do	Don't Like	Don't Know Try Me!	I'll Find Others To Help
Constituency Development				
Brainstorm to bring in names	_____	_____	_____	_____
Bring in list of personal contacts	_____	_____	_____	_____
Brainstorm ways to involve my contacts	_____	_____	_____	_____
Help cultivate these relationships	_____	_____	_____	_____
Write letters to my personal contacts	_____	_____	_____	_____
Call my personal contacts	_____	_____	_____	_____
Call donors and thank them personally	_____	_____	_____	_____
Call donors and ask them questions	_____	_____	_____	_____
Write donor surveys	_____	_____	_____	_____
Host donor reception	_____	_____	_____	_____
 Face-to-Face Solicitation				
Organize campaigns*	_____	_____	_____	_____
Recruit volunteer solicitors	_____	_____	_____	_____
Do team solicitation with someone else	_____	_____	_____	_____
Brainstorm prospect names	_____	_____	_____	_____
Bring in my own list of personal contacts	_____	_____	_____	_____
Solicit my own contacts	_____	_____	_____	_____
Let others talk to my contacts	_____	_____	_____	_____
Help determine gift amount to ask	_____	_____	_____	_____
Go to groups and make presentations	_____	_____	_____	_____
Solicit people I don't yet know	_____	_____	_____	_____
 Phone-a-Thon				
Organize phone-a-thon campaigns**	_____	_____	_____	_____
Write solicitations script	_____	_____	_____	_____
Brainstorm names of prospects	_____	_____	_____	_____
Bring in my own list of contacts	_____	_____	_____	_____
Call my own contacts	_____	_____	_____	_____
Call other prospects	_____	_____	_____	_____
Process pledges at phone-a-thon	_____	_____	_____	_____
 Special Events				
Plan event***	_____	_____	_____	_____
Serve on organizing committee	_____	_____	_____	_____
Brainstorm guest names	_____	_____	_____	_____
Invite my own contacts	_____	_____	_____	_____
Sell tickets to my own contacts	_____	_____	_____	_____
Work at the event	_____	_____	_____	_____
Serve as host and mingle at event	_____	_____	_____	_____
 Direct Mail				
Organize direct mail campaigns****	_____	_____	_____	_____
Write letters	_____	_____	_____	_____
Brainstorm names of prospects	_____	_____	_____	_____

Bring in my own list of contacts	_____	_____	_____	_____
Sign letters to my own contacts	_____	_____	_____	_____
Have others write letters to my contacts	_____	_____	_____	_____

*Script writing, research, role playing, setting up the kick-off, etc.

**Get names in database, research phone numbers, prepare materials and pledge forms, recruit volunteers, help with training, etc.

***Determine theme, facilities, food, entertainment, prizes, invitations, thank yous

****Get names in database, address envelopes, write letters, do research, etc.

Outreach Opportunities for Board members

Board members have a unique opportunity to contribute to the success of an organization through formal and informal marketing opportunities. Board members, individually and collectively:

- give credibility and prestige to an organization
- inspire confidence in the services offered
- are the conduit of understanding and interpretation between the organization and community
- focus on social reform, the agency's part in that and the overall benefit to a community

Essential questions that must be answered affirmatively for board members to effectively market the organization include:

- Do board members know and understand the mission of the organization?
- Are board members enthusiastic about the work of the organization?
- Do board members have a plan for the future of the organization, and are they familiar with the direction being taken?
- Are board members knowledgeable about the organization's current programs and services?
- Are board members aware of similar service providers in the community, and the unique niche/role of the organization within this continuum of service providers?
- Have board members been trained in the "major selling points" of the organization?
- Do board members have good promotional materials available for distribution to others?

Opportunities to "sell" the organization to others are plentiful, and are easily taken advantage of when a board member is prepared. They often are not done "solo," but may include another board or staff person. Examples of such opportunities include:

- representing the organization in presentations to/meetings with potential funders
- representing the organization at others' special events
- being part of a speaker's bureau for presentations to service clubs, etc.
- being cognizant of community or media happenings, etc. that could involve exposure for the organization
- telling friends and family about the needs of the clients (not of the organization)
- including information on the organization in other newsletters and publications with which you are affiliated.

Sample Give and Get Commitment Form

Board Member Name _____

My personal "giving" goal:

- I personally pledge \$ _____ to this organization to support our fund raising objective.
- I would prefer to make (please check):
 - _____ one annual payment
 - _____ quarterly payments of \$ _____
 - _____ monthly payments of \$ _____
 - _____ other _____

(Each board member should give what he or she can. Some board members will be able to give more than others. No matter the amount you give, it is important to set a giving example.)

My goal for "getting" donations:

- As a board member, I will personally get (raise) \$ _____ from outside sources, including support from the business community.
- I will solicit \$ _____ for our special fund raising event.
- I will assist in building our donor list by submitting the names of potential new donors.

I will contact
personally (circle)

I believe the following people can give \$100-999/year:

_____	Yes	No
_____	Yes	No
_____	Yes	No

I believe the following can give \$1,000-4,999/year:

_____	Yes	No
_____	Yes	No
_____	Yes	No

I believe the following can give \$5,000 or more/year:

_____	Yes	No
_____	Yes	No
_____	Yes	No

I agree to participate in other fund raising activities as needed. I accept this commitment as part of my responsibilities as a board member.

Signed _____

Board Member

Board Chair

Date _____

Capital Campaign Basics

* Primary source material for this handout comes from Kay Sprinkel Grace
www.kaygrace.org

Why do a campaign?

- Bricks and Mortar (because you need a new or upgraded facility)
- Increase the visibility of your organization
- Increase the size of your base of support
- Take your station to the next level of excellence
- Engage established donors and inspire unknown donors
- Provide a concentrated focus for the organization
- Prepare the ground for more sophisticated fundraising
i.e. annual giving, major giving, legacy and planned
- giving, endowments (these are the funding base for ongoing program support over the long haul)

Capital Campaigns have the power to coalesce support, identify new support, refresh, renew, and invigorate your stakeholders and supporters.

Factors for Success:

- Clarity: you must know exactly what you are trying to accomplish, how and why
- Frequent evaluation: navigate based on results
- Leadership
- Adequate time commitment from campaign stakeholders
- Strong case statement
- Deep base of existing support
- Strong volunteer effort

People don't give because you HAVE needs, they give because you MEET needs.

All Philanthropy is based in values, you are developing relationships first, which uncovers shared values, successful fundraising comes from that.....not the reverse.

Challenges of Capital Campaigns:

- Very draining (both human and financial resources)
- Front loaded and rear loaded (extra effort required when you have the least experience in the beginning and when you are the most tired at the end)
- Can erode annual support
- May distract board leadership in areas of governance, policy, and other important issues
- Highs and lows in revenue and morale
- Huge pressure and responsibility for staff and volunteers
- Requires an investment in marketing to pull it off

Possible Road Blocks (bumps in the road to try to avoid)

- Campaign messaging that is overly focused on need
- Campaign messaging that is too long and complicated
- Non compelling messaging (example: federal money is going away so we need)
- Bad timing: toxic issue associated with the organization in the recent past, too many other campaigns happening around you, election years, organizational leadership transitions

Common Mistakes:

- Underestimating the commitment of time and energy among the stakeholders
- Taking too long and then having to jump start the campaign again
- Announcing that you are finished too soon
- Failure to organize and delegate well with volunteers
- Going public too soon
- Unrealistic timelines
- Expecting the lions share to come from grants

Capital Campaigns: Nuts and Bolts

Prepared by Sally Kane , CEO, National Federation of Community Broadcasters

First things First: Internal Readiness for a Capital Campaign

You MUST have the infrastructure to carry it off.

Phase One

- Capacity for handling donor contact AND tracking the stewardship of the donors
- Feasibility Studies
- One on one interviews with primary stakeholders
- Member/listener questionnaires
- Grant funding research

Phase Two

- Evaluate staff needs
- Develop prospectus: develop your case and timeline
- Conduct internal marketing campaign (this must be SOLID)
- Evaluation of consulting needs

Phase Three

- Identify ambassadors and advocates who can put your case forward
And help you handle objections or blow back

Second Things Second: External Readiness for a Capital Campaign

Think of concentric circles, you start from the inside and move outward.

Likewise, start with your biggest donors first and move outward.

- 100% commitment from board and staff
- Make your case to members
- Make your case to listeners
- Make your case to your community

The Ideal Progression

1. Make your case
2. Tailor your case
3. Donors champion your case

Remember that 70% of your campaign happens in the quiet phase and about 30% in the public phase!!

Golden Rules for Donor Communication

Listen more than you talk, give back more than they expect.

Show them that you “know “ them.

People give to people.....it’s personal.

Tell your story.....if you don’t believe it yourself, no one else will.

Concepts to Consider

When you are asking for support you are presenting an invitation for a donor to participate in something of value.....it’s not a hand out or a one way street.

A financial gift is about taking from abundance to create more abundance.....its not robbing Peter to pay Paul.

A gift to your station should be a gift THROUGH you to the COMMUNITY.

There are ongoing benefits that are non financial that come from successful Capital Campaigns such as enhanced organizational excellence, greater community engagement, greater satisfaction among staff, higher morale, exciting program initiatives and increased capacity to achieve program and development goals.

Public Media and Capital Campaigns

Public Media is trusted by it’s listeners. Supporters value your “independent “ voice very highly. Radio itself is a very “warm and intimate” medium. All of these factors are tremendous allies in your fundraising efforts. Try to focus on the idea of delivering a return on the donor’s investment in terms of social capital, community impact, and public service. These are very REAL deliverables. People appreciate them and they want to be part of efforts to renew them and recharge them.

Democratic societies rely on a free and independent press. Your work matters!

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Fund Raising Resolutions for 2015

Three action items I'll take to improve fund raising efforts at my organization:

Three action items I'll take to better raise funds from individuals:

Three action items I'll take to better market our organization:
