

# The Art of Fundraising

A Practical Workbook of Tools and Strategies

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# Acknowledgements

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This resource was prepared as a workbook for a Learning Journey on Fundraising, held in New Delhi, India in April 2016 and re-worked for a Learning Journey on Fundraising held in Cape Town, South Africa in February 2018. It was authored by Neha Broota, Development Manager, EMpower, who served as the lead resource for the Learning Journey, co-facilitating with Nisha Dhawan, Senior India Program Officer, EMpower. The workbook included tools and guidance on fundraising provided by Elizabeth Buck, volunteer at EMpower in the UK, Ciara Masterson, Development Manager at EMpower, Aasha Pai, EMpower Board Director in Hong Kong, and I. Neha and Nisha pulled together all the content into a digestible workbook for all workshop participants.

EMpower realized that the guidance and tools in the workbook had broader applicability outside India, and indeed fundraising is a challenge for many of our grantee partners. And, based on experience, even when the guide is simple, we know that it “takes a village” to produce a practical, user-friendly resource.

This workbook is not intended to be an exhaustive guide to fundraising for small nonprofits. Rather, it is intended to help small organizations overcome their fears about fundraising, re-conceptualize how they can fundraise, think about the most effective approaches given their capacity and context, and have some concrete ideas about how to strengthen their fundraising strategies and tactics. Simple exercises are included to help organizations translate the theory into practice.

We are grateful for the many resources we drew upon to produce this guide.

Cynthia Steele  
Executive Vice President, EMpower

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# Introduction



This workbook provides best practices, useful articles, exercises and references to assist our grantee partners in fundraising, which can be challenging.

This workbook has been used at past fundraising workshops for EMpower grantee partners with the aim to:

- Understand the landscape for fundraising and prioritize the most promising strategies for their organizations
- Gain an in-depth focus on the best way to fundraise in a corporate social responsibility (CSR) environment.
- Recognize the importance of dedicated fundraising capacity (staff, consultant or long-term volunteer, with a focus on fundraising).

This workbook is intended to provide a medley of resources and ideas so that organizations can benefit from the wisdom and ideas of others. We scouted a range of materials to uncover tools and resources that could be useful when thinking about fundraising. Permissions were sought and citations given for all materials in this workbook, as we want to credit the original sources. In some cases, where allowable, materials were adapted.

Each section of the workbook contains:

- Notes from different resources.
- A short exercise to complete.

At the end are some great resources that we recommend for further reading.

# The philosophy of fundraising<sup>1</sup>

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## **Taming the demon - fundraising and transformation**

A big part of the reason we sometimes feel haunted by the fundraising demon is because we lose sight of what fundraising is all about. At the most basic level, fundraising is about asking people for money. That helps explain the emotions we associate with fundraising. Many of us have painful relationships with money. The idea of talking about money with someone you hardly know can feel intimidating.

But is money the focus of your life, your aspiration, your career? It takes just a moment's reflection to realize that money is simply a means to an end. And what is that end? One answer is the particular goal of your organization. The immediate short-term goals may be very specific: to meet operating budget, to create an endowment. But the short-term goal is often subservient to a more ambitious long-term goal: to alleviate hunger, educate more children. Being continually aware of this much bigger reason for the work we do is one big step towards taming the demon.

Asking for money evokes scary, unpleasant emotions, but working to make the world a better place is exhilarating, inspiring and energizing. Fundraising is not just asking for money - it is a vehicle for transformation - personal, organizational, social and even global. Broadening your perspective on fundraising to embrace the need for personal and social transformation can be liberating. It is about making a difference in the world through creative human connections. Fundraising is about energy, creativity, human connections and joy. That means touching the desires, dreams and yearnings that are much bigger than your own goals, ambitions and challenges.

## **The Game Changer – make the conversation not centered on money**

Concentrate on how people want to make a difference with their life - this is the goal of the conversation. Suddenly the conversation is not about money, but the start of an open-ended, unfolding journey. Are you interested in learning what someone really cares about? Their life, their work, their dreams, their passions? The meeting will then be more creative and interesting. When meeting someone - it is about two people sitting down together and having a deep conversation about their lives and about what they can do together that might be creative, exciting, rewarding and fun.

## **Fundraising and the universal quest for meaning – it is EMOTIONAL**

- Why is it that getting people to give money can feel so difficult - even when we have a watertight, logical case to make that demonstrates the importance of our cause, the effectiveness of our program, and the value of our work? It is because people don't give for logical reasons. Research shows that people connect themselves to a cause overwhelmingly for emotional reasons rather than objective, logical ones. This is why fact-based appeals used by many nonprofit fundraisers are generally ineffective.
- People become dedicated to causes that change their self-image and make their lives feel rich with meaning. We should appeal to the innate human meaning for emotional fulfilment on behalf of the world-changing causes we serve. If you want to turn people into passionate partners for your cause, focus on providing a promise of partnerships and personal growth, also with an avenue of achieving them.

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<sup>1</sup> This section was drawn and adapted from: "The Generosity Network: new transformational tools for successful fund-raising" by Jeffrey C. Walker, Jennifer McCreia and Karl Weber (24th September 2013).  
<http://www.thegenerositynetwork.com/>

- People want to make a difference with their lives and with their money. They want to work together and to share their passions with like-minded individuals, and that is why philanthropy grows from deep-seated human needs. That is the only secret. Once you understand that people want to make a difference on the planet - even if they are not aware of it yet - you realize that the act of fundraising is not difficult, painful or frightening but is in fact deeply meaningful work.

#### **Four realities of giving**

**Giving is emotional.** People are inherently generous, and they are driven to give by emotional factors. This familiar truth is often ignored by many who focus on statistics and charts rather than human faces.

**Giving is personal.** Social psychologists tell the story of a tank full of brine shrimp being neglected in an elementary school classroom. The kids ignored the slow deaths of the shrimp until only one survivor was left - whom the kids named, anthropomorphized, and eagerly began to care for. This seems illogical, yet it reflects human nature: people want to help one person, not a mass. The good news -- modern technologies, from social media to mobile communications, make it easy to connect would-be donors to individual recipients and so trigger the instinct to help.

**Giving makes people happy.** When we help other people our brains release endorphins, producing an emotional sensation often called “the helper’s high”. This encourages people to give again -- a beneficial form of addiction that non-profits can help reinforce by providing tangible evidence of the positive results generated by giving.

**Giving is social.** When a clear plastic donation box is displayed in a museum lobby, people tend to make the same kinds of gifts they see. If the box is empty, they give nothing; if it is filled with coins, they give coins, if it is full of bills they give bills. Similarly, public radio stations find that listeners become donors when they hear stories about people like themselves making contributions.

## **Overcoming the obstacles that block the flow of resources**

### **Obstacle 1: Scarcity**

- Many fundraisers are hamstrung by the belief that money is a scarce commodity.
- Yes, we live in economic uncertainty, but the fact is that today we have access to an incredibly vast pool of financial resources, real and potential.
- Did you know that during the first half of the 21st century, individuals are expected to contribute to private foundations more than ten times the amount of money they contributed in the preceding one hundred years?
- There is plenty of wealth in our society, much of it eagerly seeking a positive outlet.
- The same is true for resources: time, networks, creativity, ideas, passion.
- The doctrine of scarcity fosters an attitude of anxiety, fear and needless competitiveness among nonprofit managers. SO not only is it inaccurate, it's also harmful.

### **Obstacle 2: Despair**

- The challenges we face are big - but we mustn't let this fact drive us to despair and inaction.
- Despair is the mind's way of keeping a safe distance of telling itself that nothing can be done.
- Of course it is true that our species faces serious problems that will take enormous efforts to fix. That is one reason so many of us have chosen to devote our lives to addressing them.
- It is also true that humankind has surmounted incredible challenges in the past e.g. eradicating smallpox.
- No one person is saddled with the responsibility of resolving any of our greatest problems alone. Rather, each of us carries the burden of making things better in our own chosen atmosphere.
- Defined in a narrow way, the tasks we face are eminently manageable and the results, multiplied by hundreds of thousands of nonprofit organizations and millions of individual volunteers, can be truly impressive.

### **Obstacle 3: Fear of Unknown**

- Reaching out to make real human connections can be intimidating at first.
- A common reaction is to flee from spontaneity and authenticity into a world of regiment, planning and control. Rather than speaking from the heart and with an open mind, we take refuge in the comforting concept of a thirty second elevator pitch.
- Touting an agreed-upon organizational line does not touch people. It does not establish an emotional bond, it certainly does not offer a promise of personal or organizational transformation.
- When seeking resources for the cause you love, don't be afraid to let go of some control.
- Bring your true self and the stories that encapsulate it to the table.
- Yes, this kind of transparency can make you feel vulnerable. But it is also exhilarating and in the long run it's the only way that you and the organizations you care for are really going to grow.

#### **Obstacle 4: Fear of Rejection**

- It hurts to be turned down, but if you remember that people really do want to make a difference on the planet with their money, you realize that rejection is fundamentally impossible.
- This claim is hard to believe and flies in the face of what every fundraiser knows. But remember our definition of fundraising: it is not about money, it is about transformation.
- If your goal is larger than just directing resources to your own cause- if your goal is to guide people to look inside themselves and discover what they truly care about, as part of their personal journey to a transformed more meaningful existence- then there is no possibility of rejection.
- What masquerades as rejection is really just the flow of resources into a different channel.
- Suppose you are raising money for poverty eradication. It may happen that the person you meet ends up being interested in art. Is this an experience of rejection or failure? If you've entered the dialogue with the attitude – it's all about the money, then you will surely take it that way and you will be on your way to fundraising burnout.
- Instead, learn to take a different mindset to recognize that your acquaintance's self-discovery is positive for the world not the rejection of you and your organization.
- The world needs people mobilizing resources for a wide range of wonderfully important things including art.
- Try responding with a heartfelt, "How wonderful!" and perhaps offer a couple of contacts who might be able to help with her/his quest to become a patron of the arts.
- Scarcity, despair, fear of the unknown and fear of rejection all make fundraising difficult.
- Once you stop allowing these obstacles to stand in your way, you may experience a flow of energy.

### **Exercises to think about the philosophy of fundraising**

Reflect on the following questions:

1. *What is fundraising?*
2. *How do you feel about fundraising?*
3. *What makes fundraising so hard?*
4. *What strategies are you comfortable with and not comfortable with (currently) when it comes to fundraising?*
5. *Which one of the obstacles has the greatest impact on your work and why?*
6. *Think about encounters you have experienced; recall one that was unproductive. How can you re-write it and make it productive based on the results above?*

### **Reflection questions**

1. *What is money's role in my life? Am I comfortable talking openly about it? Why or why not?*
2. *Do I think of money as a scorecard or as a resource to be used for things I care about?*
3. *Is my attitude towards money shaped by my fear of being dependent on others?*
4. *Do I ever use money to control other or to buy their respect or affection?*
5. *Am I willing to redefine what wealth means to me?*
6. *How do you spend your money?*
7. *What does it feel like when someone asks you for money?*
8. *How willing are you to open up to other people?*
9. *What are your deepest beliefs about the meaning of success and failure?*
10. *What are the unspoken values that shape your most powerful drivers?*
11. *Am I willing to take a risk with others – become vulnerable, enter a true relationship with them?*
12. *Am I willing to see my partners and potential partners as fully human?*
13. *Am I willing to allow others to find their own passions, even passions I may not share?*
14. *Am I willing to be the kind of person who finds continual opportunity, growth, and community as part of a team working on a common cause?*

# Guide to Writing a Fundraising Strategy<sup>2</sup>

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## What is a Fundraising Strategy?

A fundraising strategy outlines actions, time frames and resources to meet the organization's key objectives, outlined in a strategic plan (sometimes encompassing a business plan also). A strategy helps prevent wasting time and resources by outlining priorities and helping to align everyone's work around those priorities.

Your fundraising strategy should be a working document that staff and the management team use to review and learn from successes and develop future recommendations. Generally, a fundraising strategy covers between a three- and five-year period (and ideally is linked to a strategic plan or woven into a business plan for the same period). It is possible for individual projects of larger scope to have a separate fundraising strategy.

## Common contents of a Fundraising Strategy

- Mission Statement.
- Current Position.
- Links to Organizational Planning.
- Current Income.
- Raising Money.
- Review and Monitor.

## Mission Statement

Summary of your organization. It should concisely state the purpose of your organization, what it provides, the needs it meets, its core values and intended outcomes

## Current Income

Using your current year's budget, pull out income broken down by each source. Indicate when each is due to end and your best estimate on the likelihood of obtaining further funding from current funding sources. Scan unsuccessful fundraising attempts, and the reasons why funding could not be obtained from these sources – is it worth trying again or are there lessons learned to inform the fundraising strategy?

## Planning how to raise what you need

Next, you will need to decide which sources are the most promising for you to raise funding from in the current year. List these potential funders and the level and type of support they provide, as well as the amount that you will be applying for, and relevant dates for deadlines or funding awards. Under-estimating the direct costs of a project can lead to a lack of funding to cover the necessary resources and could threaten the project. In addition to the costs associated with the delivery of your project, use the "Full Cost Recovery" approach to recover a

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<sup>2</sup> Article: "A guide to writing a fundraising strategy" by Klair Price, GRANTfinder Senior Information Researcher, 2013. Permission to include - note on the website "Reproduction is authorized, except for commercial purposes, provided that the source is mentioned and acknowledged. Idox claims no copyright on any official document."

relevant proportion of the organizational overhead. These costs should be divided up so that the total yearly overhead costs are covered by funding from the individual projects.

### **Review and Monitor**

All fundraising activities should be monitored in a timely manner as the realization of funds is key to all aspects of the organization's plans. Providing a financial breakdown of the actual costs at each stage against the amount of money raised will provide details of cost effectiveness of each activity. This will enable comparisons between activities to assess which are most promising, which take the most time or may be unrealistic at this time. This assessment will inform future fundraising efforts and will alert you to any areas where assistance may be needed, such as devising better budgets or writing a grant application.

### **Deciding Who Should Fundraise**

Not many organizations, especially if small, are able to dedicate a full-time position to fundraising, therefore the task tends to be carried out by various staff members. As there are numerous aspects to fundraising, the skills of different individuals can be harnessed for varied aspects involved. One person may be really strong at conceptualizing and writing up program proposals, whereas another may be an organizational whiz able to plan and implement an event. You will need a staff team that collectively possesses strong written and verbal communication skills for preparing budgets, writing grant applications, speaking to funders and organizing events. Some fundraising skills can also be outsourced to a fundraising consultant or professional fundraiser however staff are needed to provide input on the organization's work as well representing the organization (generally also making the Ask).

### **To Conclude**

Your fundraising strategy should be one of the most important documents you will write for your organization. It is a useful working document that is able to respond to changes that occur within the funding environment or within your organization. It is a major determinant of the success and sustainability of any organization. It doesn't have to be Shakespeare's prose but should be a living guide to how you plan to raise needed funds. It will enable you to:

- identify all the costs associated with each project or activity so that your organization reaches its intended outcomes.
- strategically plan how you will raise funds for each part of the projects you intend to carry out
- ensure that all staff are clear on their involvement.
- outline deadlines for submitting grant applications and timescales for stages of progress to be adhered to, which will allow staff to plan their workloads.

## Fundraising strategy template

### Background

This section helps you focus on why you need to raise the funds you do and should have the following information:

- What is your organization's mission?
- What initiatives you are planning on fundraising for?
- What do you plan to do with the money you raise?
- Key achievements of the program to date

### Fundraising overview – Where are you now?

- 1. How did it go last year, what about the previous years, what worked well, what did not work well?**  
*E.g. We now have the track record and credibility to engage confidently with other funders and thought leaders in order to leverage support. We did not spend enough time researching fundraising tools and developing additional activities to continue the expansion of our program and influence the donor community.*

- 2. What are the external threats?**  
*E.g. Are there other organizations carrying out similar work in your areas*

- 3. Identify areas of untapped potential or gaps that need to be addressed**

- 4. What are your current sources of funding?**  
*E.g. Using your current year's budget, pull your income broken down by each source.*

*Indicate when each is due to end and your best estimate on the likelihood of obtaining further funding from current funding sources.*

*Scan unsuccessful fundraising attempts, and the reasons why funding could not be obtained from these sources – is it worth trying again or are there lessons learned to inform the fundraising strategy?*

- 5. What are strengths within your organization?**  
*E.g. the reputation of your organization or the fundraising skills of staff members, track record of success, trust of the community, actions/services that only you provide etc.*

- 6. What are your fundraising resources?**  
*E.g. provide an indication of what resources you have and might need to successfully implement your plan.*

- 7. Measurement**  
*E.g Measure aspects of your current fundraising, such as the attrition rate (% of donors that are lost in a given period), response rates–(e.g. on Christmas appeals) and return on investment.*

*The 'fundraising ratio' between what you spend on fundraising efforts (in different forms, such as grant applications vs. events) and how much goes towards the cause.*

### **Fundraising Goal/ Objectives – Where do you want to be?**

The best starting point for your plan is with the end in mind: what is your overall fundraising goal? (Even better, what is your overall fundraising goal for this year, and for each of the next four years?).

This number should be based on the needs of the organization. How much money will your group need to raise in order to carry out the activities that you want to carry out? Where the organization envisions itself in the future and what is the organizations current state?

These should link in with the organizational objectives. Ensure that your fundraising targets are based on thorough analysis, realistic and achievable objectives.

### **Fundraising Approach - How do you get there?**

Once you know how much you need to raise and why you need to raise it, you need to figure out how you are going to raise the full amount.

What tactics will you use to raise your goal amount this year? Next year? The year after? Go into detail here, and figure out a goal for each of the tactics that adds up to your total goal. (For example, if you need to raise \$5,000 you may say that you will raise \$3,000 through a major donor group and \$2,000 through an event).

Keep in mind that there are no shortages of tactics, only a limited amount of staff and volunteer resources to implement your ideas. Try to include a good mix of fundraising tactics, and be willing to mix ideas that end up not working, and make up the lost revenue elsewhere. You will also need to include the acceptable costs of raising these funds from the various sources.

#### **For example:**

Create a plan of action: Fundraising target (raise 100,000, renew 65% of donors, acquire 500 new donors) - which then leads to

The fundraising strategy ( raise 25k through foundations, raise 50k through major gifts, raise 25k through individual donors) – which then leads to

The action plans (strategy, description, target audience, goal, cost, who will do and by when, what resources are needed)

#### **Other Points**

- You should aim to approach as many funders as possible to increase your chances of success and diversify your funding sources.
- Being heavily dependent on one or two funding streams could be of detriment to your organization should these sources be withdrawn or dry up.
- All potential funders and the level and type of support they provide should be listed next to the aspects of each project, stating the amount that you will be applying for.
- You should also state the relevant deadline dates and the length of time before they respond to you as this will enable you to set a realistic project start date.
- An important aspect to remember is to calculate the costs of each project with precision. Underestimating the direct costs of a project can lead to a lack of funding to cover the necessary resources and could threaten the project.
- Whilst you may successfully calculate the costs associated with the delivery of your project, failing to cover all of the associated day-to-day organizational costs could ultimately put your organization at risk and decrease any chances of sustainability.
- Project costs should also include the relevant proportion of overheads. These costs should be divided up so that the total yearly overhead costs are covered by funding from the individual projects.

**Ways to present the data**

1. Identify sources of funding (old and new)

Source	\$ Goal	Strategy	Tactics	Responsible Person	Timing

**OR**

2. Other goals

Goal	Strategy	How will you measure it
Increase donor retention by 50%		
Increase Board involvement in fundraising		

**OR**

TIMING:	Year-round
GOAL:	\$10,000 (5 new donors at \$2,000 each); Increase number of mid-level donors by 10%
NO. PROSPECTS:	TBD
STRATEGY:	Focus on strengthening mid-level donor relationships to transition them to major gifts in the future. This will be achieved through increased personal visits and targeting engagement by areas of interest. Cultivate through events, face-to-face meetings, select invitations to NEXT GEN to pace gifts and transition to Major Gift level within three (3) years.
TACTICS:	<ol style="list-style-type: none"> <li>1. Compile prospect list of 20-30 high level prospects (list review with BOD)</li> <li>2. Qualify prospects and begin outreach to Top 10</li> <li>3. Arrange initial meetings</li> <li>4. Develop individual cultivation plans</li> <li>5. Develop case for support and collateral materials on program areas for funding i.e. geographic, program or issue specific.</li> <li>6. Work cultivation plans during the year</li> </ol>
RESPONSIBILITY:	Development Manager

## Timing

**Many organizations stumble here – they come up with a solid budget, have a great mission, and draw up a plan that includes a solid group of fundraising tactics, but fail to set timelines, and thus never seem to get things done.**

Some development pros like plans that have only basic timelines: Hold an event in April, send out a mailing in September, run a board giving campaign in November.

However, a more detailed timeline that lists not only the big picture goals, but also all the small goals that go into making that big goal a reality will be helpful. For example, instead of just listing that we are having an event in April, you could also list when decisions on venue and entertainment need to be made, when sponsors will be solicited, when invitations will go out, etc.

Whichever type of timeline you include, include one... it will force you to think critically through your fundraising decisions, and provide invaluable guidance on your activities as the year progresses.

	Description of Work	Start and End Dates
Phase One		
Phase Two		
Phase Three		

## Monitoring and Review Process

Monitoring and Evaluation will help you determine the success or failure of an initiative. It should be an ongoing process, rather than left until the end of the project.

Your strategy should detail how you will keep records, demonstrate learning from aspects of your fundraising initiatives that did not work, and improve on your successes.

Your fundraising strategy should be the subject of a regular review so that it may be updated and modified to respond to any changes that occur. This could be in relation to current or new funding opportunities or with regard to changes within your organization.

Providing a financial breakdown of the actual costs at each stage against the amount of money raised will provide details of cost effectiveness of each activity. This will enable comparisons to be made between activities to assess if the fundraising targets were under- or overambitious. This assessment will inform future fundraising efforts and will alert you to any areas where assistance may be needed, such as devising better budgets or writing a grant application.

## To Conclude

Your fundraising strategy should be one of the most important documents you will write for your organization. It is a useful working document that is able to respond to changes that occur within the funding environment or within your organization. It is a major determinant of the success and sustainability of any organization. It doesn't have to be Shakespeare's prose but should be a living guide to how you plan to raise needed funds. It will enable you to:

- Identify all the costs associated with each project or activity so that your organization reaches its intended outcomes.
- strategically plan how you will raise funds for each part of the projects you intend to carry out
- Ensure that all staff are clear on their involvement.
- Outline deadlines for submitting grant applications and timescales for stages of progress to be adhered to, which will allow staff to plan their workloads.

Development Calendar for the year

TIMING	ACTIVITY	AUDIENCE	PERSON RESPONSIBLE
<b>Q1</b>			
<b>JUNE/JULY 2015</b>	Draft Development Plan		
<b>AUGUST 2015</b>	Draft Case for Support		
	Major Gift Prospect Identification		
	List review of Major Gift Prospects and Donors		
	Corporate and Private Foundation Identification		
	EM GIVES Corporate Sponsors	Past sponsors (buy/sell); other corporates	
	EM GIVES Committee Invitation	Past committee members, other donors	
	EM GIVES Save the Date	Past Event Attendees	
<b>SEPTEMBER 2015</b>	Board and Underwriter Indications	Meet individually to discuss commitment; table list	
	Target list of top prospects and bring on intern to conduct research		
	2 September - LatAm Grantee Partner Salon Dinner with FCP – Rupert Hope	TBD Cultivation through presentation on LatAm shared interest with follow up cultivation plan	
	EMpowerUP! 100 Miles for EMpower	Small – mid level Individuals - Cycling enthusiasts	
	Salon Dinner	5-6 high level prospects	
	CT Major Donor Visit		
	Boston Dinner	MG Donors and prospects; Boston Board	
	Mid and MG Donor Visits	Individual donors and prospects – prep for FY16	
<b>Q2</b>			
<b>NOVEMBER 2015</b>	CYE Solicitation with Remit enclosure	Small- to mid-level donors and prospects	

	LA Salon Dinner 2 or 6 November	Major gift prospects	
<b>Q3</b>			
<b>JANUARY 2015</b>	NEXT GEN Cocktail Reception	Current and prospective Next Gen Members	
	Annual Dinner Prep	Table Hosts – confirm invitation lists	
<b>FEBRUARY 2015</b>	Annual Dinner Prep	Continue to work with table hosts on guest lists	
<b>MARCH 2015</b>	(TBD)	Major Gift Prospects	
<b>Q4</b>			
<b>APRIL 2015</b>	Boston Salon Dinner (TBD)	TBD	
	Budget Season		
<b>MAY 2015</b>	TBD		
<b>JUNE 2015</b>	Grants Meeting Event		
	Close FY 16 Pledges		
<b>Ongoing</b>	Major Gifts		
<b>As Needed</b>	Development Trips	Major gift prospects outside NYC	

## Future Planning

	AREA	STRATEGY
<b>FY 2016</b>		
<b>GROW:</b>	EM GIVES revenue	Increase sponsorship through more benefits and contacts Increase night-of donations with tiered rewards and minimum suggested gift/equivalencies
	Mid-level donor Engagement	Increase number of personal interactions with existing mid-level donors Discuss interests and level of commitment to EMpower Solicit Gift Qualify for future Major Gifts
	Board Involvement	Create individualized, annual action plan
	Annual Solicitation	Institute annual mailing to initiative donor relationship with low gift level prospects
<b>MAINTAIN:</b>	Annual Dinner Revenue	Continue new format and increase awareness Clearer direction to/from table hosts on FR
	NEXT GEN	Increase engagement through events and volunteer opportunities
	Underwriter Commitments	Re-engage through personal meetings
<b>GROUNDWORK:</b>	Major Gifts Strategy	Identify and begin cultivation, secure gifts when appropriate; Primary goal is to engage donors Increase number of signed pledges or gifts in hand
	Corporate and Private Foundations	Identify and research top prospects with help of intern Identify connections and contacts
<b>HOLD:</b>	Crowdfunding	Do not include crowdfunding as significant driver of revenue at this stage
<b>FY 2017</b>		
<b>GROW:</b>	Major Gifts	Continue cultivation and solicit where appropriate; grow number of gifts
	NEXT GEN	Engagement calendar for Next Gen
	Corporate and Private Foundation	Begin grant proposal process with connections
<b>MAINTAIN:</b>	Annual Dinner	Continue with model if working; identify additional table hosts through MG cultivation
	Annual Solicitation	Continue if FY16 results are positive

EM GIVES	Build momentum and sponsorship
Mid-Level Giving Strategy	Continue to build pipeline
<b>GROUNDWORK:</b>	New initiatives as opportunities arise
<b>FY 2018</b>	
<b>GROW:</b>	
<b>MAINTAIN:</b>	
<b>GROUNDWORK:</b>	

## Six Questions Trustees Should Ask Their Fundraisers<sup>3</sup>

- 1. How much have we raised over the last five years and what is the strategy for growing income over the next five years?**
  - Focusing on only annual income will actually stifle income growth.
  - Asking about past growth in fundraising and future plans will help you to understand the strategy for fundraising.
  - Your lead fundraiser should be able to provide this kind of information.
  - Exploring why fundraising has grown or fallen will help you understand the pressures your fundraisers are under and the strengths and weaknesses of the strategy.
  
- 2. How has the budget changed over the past five years and what is the investment plan for growing fundraising for the next five years?**
  - No strategy can work without appropriate investment, and asking how the budget has changed over the past five years will be quite illuminating.
  - How much have the fundraisers been able to achieve with the budget they have been given? What are the stretch points? Are you under- or over-invested?
  - Too many organizations focus on incremental annual growth with similarly incremental investment, when perhaps a bolder approach to investment would lead a step change in fundraising income.
  

I found it fascinating to listen to the story of a fundraising director who on appointment had put together a five-year strategy which required an increase in fundraising staffing by five to drive up income. The board accepted his strategy and his targets, but instead of giving him the budget all at once, they said he could have one new team member a year for five years. Unsurprisingly, at the end of the five years, the team had not reached the targets. He had not actually had the required resources until year five. Had he had them all in year one, they might have exceeded expectations!

  
- 3. Which organizations do we benchmark ourselves against? How have they grown their fundraising income and what are their resources?**
  - Of course, it is hard to judge fundraising performance without understanding what good looks like.
  - It is always helpful to understand what other similar organizations are achieving and what your comparative strengths and weaknesses are.
  - Your fundraisers might not have had the time to priorities benchmarking, but supporting them to do so, or getting external benchmarking, will help to test the strength of their strategy.
  
- 4. How many individual donors do we have, how do we recruit them, what do we know about them, how do they choose to give (regularly, legacies, etc.), and what levels do they give at?**
  - Ideally, your fundraisers should be able to provide you with well-informed data on the number of donors, how they are recruited, their profiles, how they chose to give (or are asked to give), and how much they are giving.
  - This will help you to understand how fundraising is being organized. If your fundraisers are not able to provide you with this data, this might indicate a lack of resources being put into data management or an immature fundraising operation.
  - It will also highlight strengths and vulnerabilities in your fundraising income. Are your donors all coming from one particular activity? Are you working hard to secure one-off gifts and not trying to encourage regular giving by direct debit?

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<sup>3</sup> From article: "Six questions trustees should ask their fundraisers" by Susie Hills. <https://grahampelton.com/six-questions-trustees-should-ask-their-fundraisers/>

**5. How are we looking after our donors? How many do we lose each year? What is our budget for donor care?**

- Are you losing lots of donors each year?
- If so, are you doing enough to look after donors?
- In this tough climate, the importance of donor care cannot be underestimated. As the number of donors increases, the time and investment in donor care should also increase. It is easier and cheaper to hold onto and love a donor than to find a new one.

**6. What do you need us to do?**

- Fundraising is a team game, and the fundraisers cannot deliver results without the whole organization being behind them.
- This includes the trustees. Trustees should lead by example and make a thoughtful gift to the organization.
- They should also be willing to help ask others to give, to make introductions, and to champion fundraising generally. It is the fundraiser's job to make this role as easy and enjoyable as possible, but fundraising must be a vital part of the work of all trustees.

**Evaluating Fundraising Techniques [Example]<sup>4</sup>**

**Objective:** To compare funds raised and the corresponding key cost drivers of each technique in the past year.

Fundraising Techniques	Total Funds Raised	Key Cost Drivers**
Special Events Dinner Gala	\$700,000	<ul style="list-style-type: none"> <li>- Venue/Facilities</li> <li>- Entertainment</li> <li>- Lighting and sound</li> <li>- Hire of equipment</li> <li>- Insurance</li> <li>- Staff costs</li> <li>- Volunteer expenses</li> <li>- Marketing (inc. Leaflets, posters and program)</li> <li>- Advertising</li> </ul>
Direct Marketing e.g. Mass emails/ Newsletters	\$32,936	<ul style="list-style-type: none"> <li>- Marketing (inc. Leaflets, posters and program)</li> <li>- Advertising</li> <li>- Staff costs</li> <li>- Volunteer time</li> </ul>
Fundraising dinner gala	\$270,000	<ul style="list-style-type: none"> <li>- Venue/Facilities</li> <li>- Staff costs</li> <li>- Volunteer expenses</li> <li>- misc.</li> </ul>
*Partnership & Sponsorship Corporate Donor	\$40,000	<ul style="list-style-type: none"> <li>- CUP magazine</li> <li>- Tom Lee</li> <li>- Cle de peau</li> </ul>
Others: Individual Donor/organization	\$50,000	<ul style="list-style-type: none"> <li>- Cecilian Singers</li> <li>- Collins and Kenti Gallery</li> </ul>

\*Partnership and Sponsorship with both Corporations, Foundations, etc.  
 \*\*Cost Drivers: e.g. Venue/Facilities, Entertainment, Lighting and sound, Hire of equipment, Insurance, Staff costs, Volunteer expenses, Marketing (incl. Leaflets, posters and program), Advertising, Board discussion time, and risk to organization reputation.

<sup>4</sup> This worksheet was taken from ACS Fundraising Strategy Project Pre-WS2 Homework.

**Evaluating Fundraising Techniques**

**Objective:** To compare funds raised and the corresponding key cost drivers of each technique in the past year.

Fundraising Techniques	Total Funds Raised	Key Cost Drivers
Special Events		
Direct Marketing		
Fundraising Events		
*Partnership & Sponsorship e.g. Project Grants; Pro Bono Medical Service/ Legal Service		
Others:		
Others:		

# Change your Perceptions and Create a Culture of Fundraising<sup>5</sup>

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Despite its obvious importance, NGOs spend as little as they can on fundraising, and they talk as much as they can about how little they spend on it. Fundraising is perceived as something negative and most NGOs (or their boards):

- think that fundraising cannibalizes program funding
- spend most of their time only on programmatic work and don't want to invest more time into fundraising
- don't want to spend more time to make more personal asks as they prefer to keep running the same fundraising events
- don't want to hire a development professional as they believe they can't afford it

However, without fundraising, there are NO programs.

The expression “it takes money to make money” is as true for fundraising as it is for any other arena. Even the smallest non-profits must find a way to secure at least one professional dedicated to fundraising. It is unrealistic and ineffective to expect any other staff member, especially the Executive Director, to simply add ALL fund development responsibilities to their already full plate (Executive Directors have ultimate responsibility and always some role in fundraising of course). In addition, without someone responsible for the fund development program, it will never reach its potential.

## What can nonprofits do to elevate the importance of fundraising?<sup>6</sup>

- Invest more **time** into fundraising and development operations.
- Invest more **money** into fundraising including hiring the right people
- **Assess how much the development staff make.** To get talent to do fundraising, you will need to pay them accordingly. This is not a place to skimp.
- **Try new fundraising strategies** which means making more asks, being bolder, and being ready to spend more of your energy on development... so that you will eventually have more money to carry out your mission. Does your organization have some budget for trying new fundraising tactics each year? Innovation is essential to reaching your long-term fundraising goals.
- **Think about how updated your fundraising technology is.** What type of donor database do you have? What

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<sup>5</sup> This section draws on the following resources: Don't Fool Yourself about Fundraising by JOE GARECHT; <http://www.thefundraisingauthority.com/fundraising-organization/fundraising-fool/>; Equal Rights for Fundraising Dan Pallotta; <https://hbr.org/2009/09/equal-rights-for-fundraising>; Dedicated professional fundraising staff - [http://www.firstnonprofit.org/wp-content/uploads/2014/04/Fundraising\\_A-Partnership-Between-Board-and-Staff.pdf](http://www.firstnonprofit.org/wp-content/uploads/2014/04/Fundraising_A-Partnership-Between-Board-and-Staff.pdf)

<sup>6</sup> This section draws on: Don't Fool Yourself about Fundraising; by JOE GARECHT; <http://www.thefundraisingauthority.com/fundraising-organization/fundraising-fool/>; 3 Provocative Questions to Ask about Your Non-Profit's Fundraising <http://www.thefundraisingauthority.com/fundraising-organization/3-fundraising-questions/>; by JOEGARECHT; <https://hbr.org/2010/08/we-need-to-rethink-fundraising.html>

kind of online tools does your fundraising team have at its disposal? For example, do your fundraiser/s have cell phones or laptops provided by the organization so that they can get out of the office, do donor meetings, and have meals with prospects?

- **What is your budget for fundraising training and innovation?** Training and innovation are integral to the long-term success of your fundraising efforts. Does your nonprofit pay for the fundraising team to take any online classes and webinars, buy books, or go to conferences and seminars? Are they encouraged to take a couple of days per year to brush up on your skills and learn new fundraising techniques?

If you want to master fundraising, you must create a culture of fundraising within your organization.<sup>7</sup> One of the biggest obstacles to fundraising success is an organization's inability to mobilize diverse people in the organization to participate in fundraising activities and the lack of integration between "program" and "fundraising" work.

Program staff are considered to have deeper understanding of the issues in which the organization functions. Fundraisers, on the other hand, are seen to have little to do with the mission of the organization and who have a role of carrying out specific tasks. Often program staff do not want to be part of the development team, and so the fundraising staff feel the burden of thinking that they have the entire onus to meet the fundraising target.

Turnover in fundraising staff is often far higher than for non-fundraising staff. There are frequent complaints about how hard it is to find a good person to fill a fundraising position. Well, no wonder! Fundraisers are seen as doing the work that no one else wants to do, but not as having the programmatic skills, political vision, or connections to the issues that would make their jobs more interesting and their contributions to the work more powerful. By ignoring these potential strengths, an organization loses some valuable input from key staff people as well as a way to decrease turnover in their development department.

When an organization embraces a "culture of fundraising," in which fundraising and program responsibilities are shared among staff and integrated with each other in their planning and implementation, these problems lessen, if not disappear.

### Tips for Creating a Culture of Fundraising

1. **Send staff and board to fundraising trainings** — not just once, but periodically as the need for greater skills arises. Providing regular opportunities for trainings in specific areas — such as asking for money, writing effective letters — will build more skills among a broad group of people in your organization.
2. **Don't segregate fundraising from program activities.** When planning for either fundraising or program work, invite input from people whose primary work is in the other sphere. It is important that fundraising not be relegated to one or a few people in a development office, but distributed among board members, non-fundraising staff, and volunteers. This is a practical approach, as it increases the opportunities for money to be raised and distributes the workload among more people. People who give you money can also be called on to act on behalf of your group — whether by writing letters, or talking about your work to their friends, neighbors, and colleagues. Another part of this equation, however, is giving fundraising staff opportunities to share in the program work. **Set aside time once or twice a year at board or staff gatherings to discuss some aspect of money and our society's attitudes about it.** You can start with an old favorite: "What are your earliest memories of money and what were the messages you got about money from your family, your community, or your school?" From there, the group can come up with topics they want to pursue e.g. the role of taxes and the government in funding the work we do, and so on. Creating greater comfort among board and staff in speaking about money will not only give your fundraising a boost, it will also increase your level of engagement with each other about issues that affect your work. This helps build morale and a sense of shared involvement.

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<sup>4 7</sup> This section draws from the following resources: Creating a culture of fundraising in your organization: [http://www.cdsfunds.com/creating\\_a\\_culture\\_of\\_fundraising\\_in\\_your\\_organization](http://www.cdsfunds.com/creating_a_culture_of_fundraising_in_your_organization), Article by Stephanie Roth

CREATING A CULTURE OF FUNDRAISING, *Working together*, <http://saadandshaw.com/fundraising-culture/>

3. **Make sure you have representation of staff, board, volunteers, and members for each important fundraising activity.** Special events are one type of fundraising activity that often involves a volunteer committee of board members and others along with staff support. But what about direct mail campaigns, or small-scale phone-a-thons to a targeted part of your list? Major donor campaigns, too, will raise more money if you make sure to include people on the committee who represent different constituencies of your organization.
4. **Develop specific ways for people to get involved.** Telling board members or volunteers that they must engage in fundraising but leaving it up to them to figure out exactly how doesn't work. For folks who are reluctant to have anything to do with fundraising, find simple tasks that aren't so threatening, such as adding personal notes to letters or making calls to thank donors for their gifts. Later they can move on to ask for money or plan a house party.
5. **Create an annual pledge form on which board members indicate what they are willing to do that year in the area of fundraising (and giving).** In addition to specifying various activities they can choose from — such as joining an event committee, hosting a party, or selling raffle tickets — you can give board members the option to decide for themselves how they want to participate. This often gets more positive results than giving them a preselected set of tasks to carry out.
6. **Leadership from the executive director and the chair of the board are critical.** They both need to support the notion that fundraising is a shared responsibility among all members of the organization. If the executive director believes that the development staff is responsible for doing all the fundraising for the organization, then other staff will follow that lead. Similarly, if the board chair is not doing their share of fundraising and of encouraging and motivating other board members, it is unlikely there will be full participation from the board.
7. **Explicitly include expectations regarding giving and fundraising into the roles and responsibilities of board members and key staff.** When recruiting volunteers be sure to offer each the opportunity to give and to participate in fundraising. Provide all employees, students, clients, visitors and others who benefit from or appreciate your work with the opportunity to participate in fundraising, and include it explicitly in the job descriptions of key staff who should have a role (the Director but also others).
8. **Celebrate your fundraising successes.** Make sure people are recognized and rewarded for their contributions, even if there isn't a lot of money to show for them initially.
9. **Use an organizing model to get people involved.** If you are starting with a group of people on the board or staff who resist fundraising, don't try to recruit everyone to the cause at once. Approach those who seem most open (especially those in leadership positions who can influence others) and use them to help convert others to the work. Don't worry so much about the people who complain that they shouldn't have to raise money; concentrate on those who understand why it's important to be involved and others will eventually follow.
10. **Start building and strengthening your fundraising culture by including fundraising in your mission, vision and values.** Tie your strategic plan and business plan to a fundraising plan.
11. **Make sure everyone within your organization knows how much funding needs to be raised on an annual basis, what the funds are used for, and the impact that will be achieved.** Be transparent. Show where the money currently comes from and ask for help identifying where additional funds could come from.
12. **Make a commitment to create a culture of fundraising, knowing that it may take some time.** Keep in mind that changing an organization's culture can sometimes take years. Don't give up too fast. The question need to change from, "Who is going to do the fundraising?" to "How can I help with fundraising?" Start now.

## **Fundraising Team (Part 1)**

**Objective:** To outline key team members' involvement in fundraising efforts for your organization and to ensure that fundraising responsibility is shared amongst the organization.

**Explanation:** For each team member listed in the first column (feel free to add more), determine how involved they are in fundraising (column 2: high/medium/low). Then in the third column describe what team members are currently doing to support fundraising.

### **To help distinguish each team member's current efforts in fundraising:**

How engaged is each key team member in fundraising planning, important fundraising activities or support work etc.? Identify the ways in which a team member is currently supporting the organization's efforts in fundraising. Use the examples below to discuss the work involved.

### **Examples of Key Fundraising Activities:**

- Developing Fundraising Plan
- Networking and Engaging Prospective Donors
- Event Organization
- Relationship-building of current donors
- Making the direct asks of donors
- Preparing Communication Material for Donors
- Coordination of Donors Requests
- Administrative support for donations and Managing Donors database
- Proposal development, and reporting
- Others

**Fundraising Team (Part 1): Overview [Example]<sup>8</sup>**

Key Team Members	Current level of Involvement in Fundraising (High/Medium/Low)	Description of Team Member's <i>Current</i> Efforts in Fundraising
<b>Board Members</b>		
<i>Michelle Kim</i>	<i>High</i>	<i>Leads the effort to draw up Fundraising plans and oversees Fundraising Events such as Dinner Gala, Concert, Donor Campaign</i>
<i>Thomas Chai</i>	<i>High</i>	<i>Supports the effort to draw up Fundraising plans and supports Fundraising Events such as Dinner Gala, Concert, Donor Campaign</i>  <i>Providing financial advices in budgeting and amount request, etc., connecting with potential donors and corporate</i>
<i>Suzanne Chu</i>	<i>High</i>	<i>Supports the effort to draw up Fundraising plans and manages Fundraising Events such as Dinner Gala, Concert, Donor Campaign</i>  <i>Managing fundraising events, connecting with potential donors</i>
<i>Candice Lee</i>	<i>High</i>	<i>Supports the effort to draw up Fundraising plans and supports the Fundraising Events such as Dinner Gala, Concert, Donor Campaign</i>  <i>Experience in event management and corporate pitching</i>
<b>Frontline Staff</b>		
<i>Jason Wan</i>	<i>High</i>	<i>Supports the effort to draw up Fundraising plans and support Fundraising Events such as Dinner Gala, Concert, Donor Campaign</i>  <i>Support in administrative works of fundraising, including donor database, draft of documentations, etc.</i>
<b>Volunteers</b>		
<i>Elizabeth Oh</i>	<i>High</i>	<i>Supports the effort to draw up Fundraising plans and support Fundraising Events such as Dinner Gala, Concert, Donor Campaign</i>
<b>Existing Key Donors</b>		
	<i>High</i>	<i>Supports the effort to draw up Fundraising plans and support Fundraising Events such as Dinner Gala, Concert, Donor Campaign</i>

<sup>8</sup> This worksheet was taken from ACS Fundraising Strategy Project Pre-WS2 Homework.

**Fundraising Team (Part 1): Overview exercise**

Key Team Members	Current level of Involvement in Fundraising, Planning, Key Activities or Support Work (High/Medium/Low)	Description of Team Member's <i>Current</i> Efforts in Fundraising
Board Members		
Executive Director		
Business Development Staff		
Frontline Staff		
Volunteers		
Existing Key Donors		

## Fundraising Team (Part 2): Discussion Starter<sup>9</sup>

**Objective:** To review the output of Fundraising Team (Part 1) activity to **improve upon current effort** and increase value add of fundraising team members by specifying tasks and opportunities to participate in the fundraising process.

**Explanation:** Use this template as a guide while meeting with team members to update/confirm and increase their responsibilities and a tool to indicate to each team members what others in the organizations are helping with.

	Currently	Future Involvement			
Key Team Member	Current Level of Involvement in Fundraising (High/Medium/Low)	Donor Development Process			
		Phase 1: Donor Identification	Phase 2: Donor Engagement	Phase 3: Donor Management	Phase 4: Donor Expansion
<b>Board Member</b>	Record the degree of involvement (High/Med/Low) of each person and verbally summarize the description of his/her efforts in Fundraising.	Identify prospective donors who might have a personal interest in the mission/case	Nature and support relationship building between the organisations and the prospective donors	Design or implement a formal acknowledgement process for donations i.e. thank you letter	Help in keeping existing donors informed/involved. Motivated to participate again
<b>Executive Director</b>					
<b>Business Development Staff</b>					
<b>Frontline Staff</b>					
<b>Volunteer</b>					
<b>Existing Key Donors</b>					
	Work through/research personal networks to highlight potential supporters?	Help to develop fundraising tools used for relationship building i.e. annual reports, brochures, press release	Be active in helping donors understand that their gifts are valued and their donations are making a difference	Build donor relationships overtime to increase commitment levels	
			Participate in a solicitation or ask event that they would be comfortable in	Identifying inaction donors and re-engaging them to renew their support to the organisation	

<sup>9</sup> This worksheet was taken from ACS Fundraising Strategy Project Pre-WS2 Homework.

	Today	Tomorrow			
Key Team Member	Current Level of Involvement in Fundraising (High/Medium/Low)	Donor Development Process			
		Phase 1: Donor Identification	Phase 2: Donor Engagement	Phase 3: Donor Management	Phase 4: Donor Expansion
Board Member					
Executive Director					
Business Development Staff					
Frontline Staff					
Volunteer					
Existing Key Donors					

# What to Look for when Hiring Fundraising Staff<sup>10</sup>

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Hiring the right fundraiser(s) for your nonprofit can literally make or break your development program. There are a number of things that allow you to know whether or not someone is going to be a great fundraiser, for example:

## **Passion for the Mission**

Having an interest in and passion for your non-profit's mission is important for your fundraisers. Passion comes through in conversation, and your donors and prospects will know if a fundraiser is just "going through the motions."

## **Ability to Tell a Story**

Fundraising is all about building relationships, and much of what we do to build those relationships is tell stories – about ourselves, our organizations, and the people we serve. Great fundraisers need to be great storytellers. Build this into your interview process.

## **Willingness to Make an Ask**

Nothing spells trouble for a fundraising program more than fundraisers who have trouble making asks. Fundraisers should expect to be making asks every week, if not every day. In your interviews, have your interviewees run through some asks with you.

## **A Successful Frontline Fundraising or Sales Track Record**

As noted above, experience in nonprofit fundraising isn't the most important qualification for a fundraiser, although a record of accomplishment of successful fundraising or sales is a good indicator of future success in fundraising.

## **Professional Competency**

Finally, you want to hire fundraisers who have a certain base level of "general professional competency" – people who can think on their feet and make small decisions on their own. You should not have to worry about printing out directions to prospect meetings for your fundraiser or explaining to them that they should assume there will be traffic and leave a little early.

## **Think Outside the Box**

A good fundraiser is able to think outside the box; he/she can search for donors where others did not, he/she can write project proposals in a professional and engaging way, he/she is ready to dedicate time and resources to make sure that a project can begin even when it is a small community project.

## **Personal Traits**

They should be passionate, committed, curious, honest and reliable. They should possess good communication skills, highly developed social skills, good ethics, problem solving skills, and be creative. Fundraising is far from an

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<sup>10</sup> This section draws on the following resources: How to Hire Great Frontline Fundraisers <http://www.thefundraisingauthority.com/strategy-and-planning/hiring-frontline-fundraisers/> <https://www.fundsforngos.org/free-resources-for-ngos/guide-develop-manage-fundraisers/>

easy task. Fundraisers spend time writing up applications that will never be funded, they plan activities and set targets for projects that will never begin and they will also send letters and pleas to many potential donors who will hardly reply. To be a fundraiser implies to be able to manage rejections and disappointment and transform it into a learning experience. Resilience is key. The ideal candidate should have a positive attitude and an optimistic approach to life. He/she should be able to easily establish relationships and build long term working partnerships. He/she should be able to read between the lines and understand what the donor's real needs and motivation are. As such, the ideal candidate is someone who can engage with research critically and someone with an analytical mind.

#### **Avoid Limiting Search to Candidates with Previous Experience**

Fundraising skills are mostly transferable skills, which could have been developed while doing other jobs. Therefore, do not ask exclusively for people with experience in the field! The best fundraisers may have started off in other fields and later approached fundraising as a profession. For instance, you could consider candidates with experience in planning (such as wedding or special events planners) because of their organizational skills, or candidates with experience in luxury retail because they will know how to approach potential donors and how to push the sales. You could also consider candidates with teaching experience or who had worked in human resources because they had been trained to listen to people, understand concerns and solve problems quickly thus they will best profile potential donors and quickly develop strategies to approach them. Staff who have managed programs bring an in-depth knowledge and direct experience with your beneficiaries that can translate into strong proposals or donor pitches.

Strong writing – and other communication – skills are vital for a good fundraiser, as they need to write compelling, punchy messages asking for funding and often proposals or reports. If you have funders from the English-speaking world, ensure that your fundraiser has strong English – it is not uncommon to find organizations where the Executive Director has the best English and is therefore pulled into doing reports, proposals and other, which is usually not the best use of that person's job. Consider expats, PhD students or others who may have the required skills and be able to dedicate a chunk of time for pay or satisfaction, even if they are not full-time employees. Be open to all options to meet your skills needs!

**Fundraisers are the main contact your donors will have with your organization. Be sure that the people you hire reflect well on your non-profit.**

# Creating a Case for Support

## What is a Case for Support?

A Case for Support, or Case Statement, is a resource document that provides the rationale for supporting an organization to prospective donors. It should answer a prospective donor's questions about the validity of your organization and motivate them to want to support your mission. It is roughly 2-7 pages long and addresses the following:

1. Who is your organization?
2. What have you accomplished?
3. What is your vision for the future?
4. Why should the donor care about the work of your organization?
5. How can the prospective donor contribute to your cause or project?

## Why do you need a case for support?

- It is the foundation for all donor communications
- It is a valuable resource to everyone who is soliciting donations for your organization
- It is a resource document for proposals and grant applications
- When do you need a Case for Support?

## When do you need a case for support?

All the time! It answers critical questions for those supporting your organization and helps everyone soliciting gifts on your behalf to be on the same page. A Case for Support is especially helpful when you are working to fund a new initiative or campaign.

## Writing the Case:

1. Gather the team.
2. Gather the relevant information
3. Define your main reason or objective for doing the case (project, building, etc.)
4. Create the outline, for example:
  - i. Introduction to the Organization
    - a) Mission - What does the organization do?
    - b) What is its purpose for existence?
    - c) History and accomplishments – establish credibility
    - d) What is unique about it?
    - e) What is it trying to accomplish
  - ii. The Problem and Solution
    - a) Population served
    - b) Need/problem
    - c) Strategy/Introduce program
    - d) Goals/Objectives
  - iii. Taking Care of Business
    - a) Infrastructure of organization (staff, etc.)
    - b) Budget/Finances
  - iv. Fundraising Plan (for the project/program) and The Ask
    - a) How will the fundraising activity help it to accomplish that?
    - b) How is the donor going to be involved?
    - c) Why should the donor give their money, time, or energy?
5. Write the case. Go through a few drafts to get it right.

**A winning case statement includes these eight elements:**

1. **Use a Theme** — This is how you grab the reader and get them to turn the page. Connects to donor values.
2. **Define the Need** — What is the problem you are trying to solve? What will happen if you don't do this? What will the world look like in 5 years if you do?
3. **Position Your Organization** — Describe how your organization is uniquely positioned to meet the need head on. What you do that nobody else can do?
4. **Tout Your Credentials** — Wave the flag about your history, reputation, credibility. Tell them about your track record on these issues.
5. **Communicate Urgency** — Remind the reader of how pressing the need is and why it must be dealt with immediately.
6. **Convey Impact** — Position your donors in the case and show them how they can change the world by supporting your organization.
7. **Share the Plan** — Describe your action plan and what will be required financially to achieve it. Note that this is only one small part of the overall case.
8. **Connect to Donor Values** — Most importantly, you need to connect all of this to the donor's values, aspirations, desires and fears. Remember, your "ask" should always be based on why the donor loves your organization, not on what your organization needs

**Reviewing the case for support – Next steps**

1. Does the grantee’s Case for Support:
  - a. Highlight the organization’s uniqueness well?
  - b. Clearly explain what the needs are of the community being served?
  - c. Describe the impact the organization is making?
  - d. Indicate what the organization’s priorities are at the current time?
  - e. Explain how the organization raises funds and how those funds will be used?
2. What are the positive/standout elements of the Case for Support?
3. What are the items on the Case for Support that are unclear?
  - a. Has data been used to explain points? Is it relevant and meaningful?
  - b. Is the language used appropriate, i.e. not vague or overly emotional?
  - c. Is the Case for Support written concisely and with clarity?
  - d. Does the Case for Support avoid using a high-level of jargon?
4. Any additional feedback

Type of strategy		
What aspect of your story will be most appealing to them? [FOCUS ON THIS]		
What aspect of your story will be of least interest to them? [AVOID THIS]		
What would be the hardest for them to relate to/understand? [ADDRESS THIS]		
How will you address the part of your story that is the hardest for them to relate to/understand?		

## Developing a Case Statement<sup>11</sup>

A non-profit case statement is a clear and compelling case for support which justifies the existence of an organization or program and why individuals/funders should support it.

**Objective:** To consolidate the key points about the work of your organization and construct a usable Case Statement.

<u>Case Statement Component Categories</u>	<u>Key Messaging (Maximum 3-4 sentences per category)</u>
<b>Mission &amp; Purpose</b>	<ul style="list-style-type: none"> <li>a) What is the long term impact of your work on the overall society or community-at-large?</li> <li>b) What societal change does your organization aim to bring about?</li> <li>c) What are the values that drive the existence for your organization?</li> </ul>
<b>Background, History &amp; Accomplishments</b>	<ul style="list-style-type: none"> <li>a) When was your organization founded and by whom?</li> <li>b) What are the key milestones in your organization's history?</li> <li>c) What has your organization accomplished that builds your credibility and reputation?</li> </ul>
<b>The Need &amp; Target Population</b>	<ul style="list-style-type: none"> <li>a) What is the target population of customers or direct beneficiaries that you are serving? State their profile.</li> <li>b) What is the compelling evidence which clearly demonstrates that your services are urgently needed in the society?</li> <li>c) What challenges or gaps exist in today's environment which show no other gov't, business or non-gov't entity are meeting these specific needs.</li> </ul>
<b>The Program(s)</b>	<ul style="list-style-type: none"> <li>a) What programs and services do you offer to the community that uniquely addresses the immediate as well as the long term needs?</li> <li>b) Describe the element of your programs that are recognized as solutions to the specific problems in societal need in the community.</li> <li>c) How do you address your beneficiary needs differently or more effectively than other nonprofits who are serving similar customer groups?</li> </ul>
<b>Goals &amp; Objectives</b>	<ul style="list-style-type: none"> <li>a) Relating to the societal challenges stated above, what are the longer term outcomes your organization hope to bring about through your programs and services?</li> <li>b) What are the specific things that your organization should accomplish to bring about optimal outcomes?</li> <li>c) What future milestones will you put in place to ensure success?</li> </ul>
<b>Ultimate Societal Impact/ A Vision for the Future</b>	<ul style="list-style-type: none"> <li>a) How do you see your organization's contribution or impact to the community change over time?</li> <li>b) Re-define the scope of your organization's work within the context of the future community.</li> <li>c) Expand on what possible and new benefits your organization can bring to the community in the years to come.</li> </ul>

<sup>11</sup> This worksheet was taken from ACS Fundraising Strategy Project Pre-WS2 Homework.

### Developing a Case Statement [Example]

A nonprofit case statement is a clear and compelling case for support which justifies the existence of an organization or program and why individuals/funders should support it.

**Objective:** To consolidate the key points about the work of your organization and construct a usable Case Statement.

Case Statement Component Categories	Key Messaging (Maximum 3-4 sentences per category)	Summary of Best Practices from Comparable Organizations	Key Improvement Points
Mission & Purpose	<p>What is the long term impact of your work on the overall society or community-at-large?            Promote cultural enrichment in HK            Avail access to performing arts for underprivileged</p> <p>What societal change does your organization aim to bring about? Social Harmony, empowering and inspiring youth through music, level playing field of access to performing arts</p> <p>What are the values that drive the existence for your organization?            Respect for individual, Serving underprivileged, Artistic Excellence, inspiring our next generation and HK community.</p>		
Background, History & Accomplishments	<p>Nov 2009 - Hong Kong Generation Next Arts (HKGNA) was founded in 2009 by Pianist Michelle Kim. HKGNA's Mission is to inspire and nurture artistic excellence and personal success in our next generation of young artists and transform lives through music.</p> <p>Mar 2010- Founded Musical Angel program at St. Stephens Society (a rehab centre for recovering drug addicts, prostitutes, gang members and troubled youth) with music education and development for their youth program. Musical Angel Program provides music development programs for</p>		
Background, History & Accomplishments	<p>Nov 2009 - Hong Kong Generation Next Arts (HKGNA) was founded in 2009 by Pianist Michelle Kim. HKGNA's Mission is to inspire and nurture artistic excellence and personal success in our next generation of young artists and transform lives through music.</p> <p>Mar 2010- Founded Musical Angel program at St. Stephens Society (a rehab centre for recovering drug addicts, prostitutes, gang members and troubled youth) with music education and development for their youth program.</p>		

<p><b>The Need &amp; Target Population</b></p>	<p>Help provide musically talented youth with performance and development opportunities, help underprivileged youth overcome adversities. Hong Kong audience to support HKGNA, attend events and donate to support activities</p>		
<p><b>The Program(s)</b></p>	<p><b>HKGNA 2014 Music Festival:</b> Music festival that will feature world-class artists within classical and pop music alongside Hong Kong's very own young talents, including our Musical Angel, participants, HKGNA fellows and Music Competition winners.</p> <p><b>Musical Angel Program (on-going)</b> This program provides music education and mentoring for disadvantaged youth and aims to change lives by instilling values and a sense of self-worth, commitment and confidence through musical training. The Program provides music development programs for disadvantaged youth who have experienced difficulties in life and aims to transform their lives through music. HKGNA has been serving St. Stephen's Society (a rehab centre for recovering drug addicts, prostitutes, gang members and troubled youth) with music education and development for their youth program since 2010.</p>		
<p><b>Goals &amp; Objectives</b></p>	<p>To design and offer other music and educational programs for disadvantaged and underprivileged youth to nurture their creative talent and empower them to fulfill their dreams and aspirations.</p> <p>Provide music training program and performance opportunities for young musicians and artists and establish, develop, organize, and promote the performance and appreciation of orchestra, instrumental and performing arts generally.</p> <p>Establish, produce, present, promote, organize, arrange, manage and conduct from time to time charitable concerts, performances and presentations of music and any other allied arts in Hong Kong or in any part of the world.</p>		
<p><b>Ultimate Societal Impact/ A Vision for the Future</b></p>	<p>To inspire and nurture artistic excellence and personal success in our next generation of young artists and transform lives through music.</p>		

**Developing a Case Statement**

A nonprofit case statement is a clear and compelling case for support which justifies the existence of an organization or program and why individuals/funders should support it.

**Objective:** To consolidate the key points about the work of your organization and construct a usable Case Statement.

Case Statement Component Categories	<p align="center"><b>Key Messaging</b>  <u>(Maximum 3-4 sentences per category)</u></p>	Summary of Best Practices from Comparable Organizations	Key Improvement Points
<p><b>Mission &amp; Purpose</b></p>	<p>What is the long term impact of your work on the overall society or community-at-large?</p> <p>What societal change does your organization aim to bring about?</p> <p>What are the values that drive the existence for your organization?</p>		
<p><b>Background, History &amp; Accomplishments</b></p>			

<p><b>The Need &amp; Target Population</b></p>			
<p><b>The Program(s)</b></p>			
<p><b>Goals &amp; Objectives</b></p>			
<p><b>Ultimate Societal Impact/ A Vision for the Future</b></p>			

# Stewardship

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## What does an effective donor stewardship process look like?

### What is it?

At its core, donor stewardship is about **progressively building deeper relationships with your donors**

Stewardship is important, as it ensures that the donor has a positive giving experience that will influence both future giving behavior and what the donor will say about your institution to other prospective donors.

It shows donors that the organization they've entrusted their money to is appreciative of the gift, has used it wisely and that they've had an impact on the cause.

**Developing a stewardship plan** will help you maximize retention across years and increase the lifetime value of each donor.

It is far more likely that an existing donor will give again than that a non-donor will begin giving. Every donation, regardless of its value, should be well stewarded.

### Who Is Responsible for Stewardship?

Everyone involved in the fundraising process and in the implementation of projects that have benefited from funds raised and who has benefited directly from funding shares responsibility for stewardship.

All must be prepared to participate in stewardship activities. It is particularly important that senior staff are prepared to spend time with major gift donors, who normally prefer to develop long-term relationships on a peer-to-peer basis rather than simply receive written updates about projects.

If an institution has 1,000 donors, it is impossible for a single fundraiser to properly steward everyone and still recruit new donors, so stewardship must be a shared activity.

### The Stewardship Process

Stewardship begins during the cultivation phase of fundraising. During this phase, fundraisers develop an understanding of a prospect's giving motivations and expectations around stewardship.

A good fundraiser will gently manage the expectations of a prospect during the cultivation and solicitation process, both to ensure that they are compatible with the institution's capacity to deliver and are proportionate to the size of gift. For example, a modest donor giving £1,000 to support scholarships cannot expect a personal dinner with the vice-chancellor and monthly meetings with the scholarship program director. However, the donor might expect an invitation to an annual scholarship prize giving, a written note of thanks from one of the scholars and a yearly report on the progress of the funded scholars.

It is important that, at the point of solicitation, both the fundraiser and the prospect have the same understanding of the level of stewardship that is appropriate. You might find it useful to set some internal stewardship guidelines. Start with the basic level of stewardship that donors at the entry level should expect (e.g., gift processed and receipted within five working days, written thank you within seven working days, annual report via email, etc.).

Develop bands of stewardship relating to different levels of giving. Naturally, these guidelines will be flexible, and many major donors will have their own ideas of how they want their relationship with your institution to develop. Having a set of guidelines will help you design appropriate stewardship strategies that you can fulfill with your limited resources.

Even if your non-profit is a seasoned pro at stewardship, it can be difficult to come up with fresh ideas each year. **Here are a few ideas to refresh your donor stewardship:**

### **1. Communicate With Your Donors at Least Once Per Month**

If you do not communicate with your donors at least once per month, chances are that you are not developing as strong a relationship with them as you could. Like all relationships, donor relationships are built on communication. Use a mix of communication methods to talk with your donors each and every month: newsletters, mailings, e-mails, phone calls, free events... and you'll find that your donor relationships will deepen and grow far more quickly. These calls, whether by a board, executive director or development person are also a good opportunity to let them know about upcoming events and trips.

### **2. Make Your Communications All About Them**

Your donors like to hear about the good work that you do, but no one wants to get a constant stream of "we do this... we do that..." e-mails and letters. Instead, spend time talking *about* your donors, instead of talking *at* them. Talk about the good work you have accomplished *because of their support*. Profile a donor or two, and tell their story. Reach out to your donors with two-way communications that seek their advice, ideas, and questions. Poll your donors. Hold group conference calls for them. Offer volunteer opportunities. In short, let them interact and engage with your nonprofit.

### **3. Practice the Art of the Thank You**

Your donors are real people; they want a thank you message from a real person. Make it an institutional priority to respond to donors within 24 hours and if possible, with brief personal notes. Even if you don't think you can do it, try. If at the end of the day you are really just doing too much volume to respond to each donor with a quick note, then consider using a solution that will at least allow you to personalize the message a bit. An auto-letter with a one line sticky note on top is infinitely better than just an auto-letter. Write thank you letters and personalize your communication as much as you can. These letters should be, not just automatically generated receipt letters, but handwritten letters from the beneficiaries of a project or letters that have been personally signed by a senior member of the institution. Revise your thank you letter template annually. No one wants to receive the same, stale copy for 10+ years. Start your thank you letters with something other than, "On behalf of [x organization], thank you for your recent gift," or "Thank you for your recent gift." Boring! In your thank you note, why not include a YouTube link or copy of the annual report? Even better, have the executive director or board member call to say thank you. After an event, it is imperative you send a follow-up the next day.

### **4. Acknowledge all types of donations**

As well as significant donations, in honor gifts and those following an event, don't forget matching donations – thank your donor for going the extra mile, payroll deductions (usually monthly), 3<sup>rd</sup> party giving (e.g. Network for Good/VMG/Charities Trust) – don't rely on the automatic thank you email sent, gifts from a foundation – thank the person who put you in touch with the foundation.

### **5. Show Them the Impact**

Regardless of the specific channels you chose to reach out to donors (emails, letters, phone calls, [social media](#), blogs, etc.) you need to make sure that **the impact created with their gifts** is a central element of the conversation. When you focus your communications on impact, you accomplish two important things at the same time. You get a chance to connect with the donor AND you close the loop by showing that person the tangible result of his or her gift. This creates an important moment when donors can connect the dots between the act of giving and the ultimate impact achieved. All too often donors leave feeling like their gift went into a "black hole." Focusing on communicating impact helps eliminate this common complaint. Annual reports and regular newsletters are two broad base ways to communicate impact. On top of this base level of communication, you can layer on more personal outreach for donors who have given higher amounts (or given to particular projects or funds). Talk about the good work you have accomplished *because of their support*. Profile a donor or two, and tell their story. Reach out to your donors with two-way communications that seek their advice, ideas, and questions. Poll your donors. Hold group conference calls for them. Offer volunteer opportunities. In short, let them interact and engage with your nonprofit

### **6. Create Opportunities for Personal Interaction**

When it comes to building relationships, there's no substitute for actually meeting people in person and talking to them!

That's one reason why events play such a crucial role in your overall fundraising strategy. They are a lot more than just opportunities to raise more money; they are opportunities to have staff network with donors and cement positive relationships. Everybody in your organization should share this understanding.

On top of your existing events, you should consider periodically inviting donors into the office to meet the team. Even better, take some of them to the front lines of your programs so they can really see the impact that is being made. Start by getting creative and brainstorming with your team. Think about things from the outside in. How would you like to be acknowledged as a donor? What types of personal interactions would help solidify your support for an organization you've given to once or twice? By tackling these questions as a group you can begin to list out different options for engaging and communicating with supporters, the phone is your friend in this endeavor. After you have a good list of options you can start mapping out which ones should apply to different levels of donors. Creating an outline of your plan like this is the first step towards getting institutional buy-in and putting your new ideas into action!

### **7. Get to really know your donors**

Know your donors' wishes and respect them – use an annual survey to collect this information and record it on donors' records. Remember and **recognize events that are special to them**, such as birthdays, promotions, weddings, religious/cultural celebrations, etc. Be thoughtful – make notes of personal details you hear in conversation with donors. Did Sally tell you her daughter is celebrating her 10th birthday this weekend? Ask how the party was the next time you talk to her. People will always appreciate the fact that they were *heard*.

### **8. Do Some Segmenting to Prioritize Outreach**

You'll want to [separate your donors into different groups](#) to make sure that you are spending your time as wisely as possible. Every donor is important, but you aren't going to have a board member write a hand written letter to someone who has given \$5 (you might for someone who has given \$50,000 though). By splitting your donors into different groups, you can come up with an appropriate thank you and engagement plan for each group. What level of support merits a letter from a board member? What about personal phone calls?

These are some of the things you'll want to think of as you map out your plan. It's pretty easy to create an excel spreadsheet to chart out your thank you and engagement strategy. Make columns for different gift levels and rows for different thank you options and reach out activities. Once you've created the basic framework, all you have to do is mark out which options apply to different levels of donors.

### **9. Go Over the Top in Thanking Your Donors at Least Once Per Year**

This doesn't mean breaking the bank. What it does mean is doing something unexpected to thank your supporters. Something that is memorable enough that it will help keep your nonprofit top of mind for the rest of the year. For ex: hold a free "thank you"/appreciation event, make sure that each donor receives a personalized thank you call from a board member once per year, partner with the local zoo to send out free tickets for your donors and their families, send flowers to your larger donors on their birthdays. Pick one big way to say thank you to your donors this year, and do it! One example: Take out an ad in the local newspaper on National Philanthropy Day to thank your community.

### **10. Offer Non-Reciprocated Value**

This is something that you offer for free, without asking for a donation or other consideration. In order to be memorable, it needs to be something that holds real value for them. The additional value you offer can be personalized, such as when you come across two donors who might find value in working together in their businesses, and offer to set up and attend a lunch meeting to introduce them, or the value can be systemized, such as holding a free seminar for donors each year where you invite a well-known author to speak and sign books.

Most non-profits only offer reciprocated value to their donors – thank you notes when they make a donation, event tickets when they pay for them, pre-printed labels in a direct mail package that they are hoping the donor will pay for. Imagine how much more mindshare your nonprofit will earn by offering even bigger things to your donors without asking for anything in return.

### **11. Give Everyone a Small Taste of Leadership**

When people are given a leadership role, no matter how small, they immediately elevate their relationship with your nonprofit. How can you offer leadership roles to hundreds or thousands of donors at a time? Set up a scalable system. National political campaigns are extremely good at doing this. They set up programs where donors are asked to be local leaders – block captains, members of a leadership team in their town, "Gold Star" partners of the

campaign... in return for (a) a donation and (b) a commitment to carry out a few small tasks on behalf of the campaign.

Nonprofits can do this too. You could set up a “Leadership Club” and ask everyone who has given over \$100 to your organization to join. As members, you will send them a regular newsletter, and ask that they invite at least 3 people per year to your annual family barbeque event. The possibilities for this type of activity are endless.

### **12. With your donor’s permission, publicize their generosity.**

**Publicly acknowledge them as donors** in the press or write to their employer to say how grateful you are for your donor’s support and advice. Print their names in the alumni magazine, sports and arts programs. Have their names running along the bottom of the scoreboards at sports matches. Put donor plaques on seat backs and book plates in new library books. **Name things after major donors.** Naming opportunities include buildings, events, courses, research program, staff posts and roads/pathways.

### **13. Let technology help you**

The more you can automate stewarding tasks, the easier it will be to handle a large volume of donors. A well-stewarded donor will retain a high level of warmth toward an institution and is more likely to give larger or more frequent gifts and to maintain a relationship with an institution for a long time. Investment in stewardship is an important component of a sustainable fundraising activity. Technology can help you, for example, you can:

- Schedule regular reports to donors that are populated with statistics gathered automatically from projects,
- Include regular touch points in your annual calendar,
- Set up reminders to contact donors at regular intervals or when special anniversaries are coming up and
- Thank donors via social media & add a field to collect Twitter handles to your donation form.
- Digitize your annual report to reach more of your supporters.
- Develop a stewardship section on your website to engage online donors.
- Revamp your online gift autoresponder. You know, that email people get to confirm their gift? Make it more awesome!
- Develop a special area of your website with project updates that can only be accessed by certain donors.
- Salesforce: Use your salesforce dashboard to create a pie chart of gift acknowledgements, a list of unacknowledged gifts, a list of new donors

### **14. Make a special thank you video for one of your appeals.**

### **15. Get your board involved**

You can start by having them sign an acknowledgment letter that you send out to donors, eventually you can have the board chair or other board directors do follow-up calls to supporters they know personally to strengthen the bond between them and the organization. Also consider sending a bi-weekly list of donors that they can send a quick thank you email to – use CMS to create template.

### **16. Recognize in honor/in memory gifts in a special way. Maybe with a specially designed thank you card.**

### **17. Send an anniversary card to recognize donor loyalty and have it signed by the Chair of the Board or Executive**

### **18. Create a new donor welcome package.**

### **19. Create a stewardship matrix to show what you’ll do for donors who give at various levels.** For instance, \$1 to \$99, \$100 to \$249, \$249 to \$500. That way all staff members will be on the same page for stewardship. Perhaps donors giving \$250 a year get a personalized holiday card, whereas those giving \$1000 or more get a phone call from the President or an invitation to a coffee with other such donors to hear about a special aspect of your work.

### **20. Resolve any donor complaints and issues within 24 hours.** Yes, this is not the most fun part of our job but it is at the core of being a good steward.

**21. Process gifts efficiently and promptly.** It reassures donors about your professional competence and helps donors manage their own personal finances efficiently.

**22. Mission moments** (aka. non-ask touches) Reach out to your supporters throughout the year to let them know what's going on with your organization and check in to see how they feel about your work.

**23. Don't Let Your Donors Forget About You**

People are busy. They have got jobs, kids, social events, church activities, favorite TV shows and more often than not, a list of charities that they care about. It's easy for your nonprofit to get lost in that mix. As nonprofit directors, board members, staff and volunteers, you eat, sleep, and breathe your mission and the work of your nonprofit every day. It's easy to think that your donors do the same... that they read your website often, await your next e-mail, and think about your nonprofit in the shower. This isn't the case. Your nonprofit is just one of many things on their minds. That is why it is vitally important to keep your organization "top of mind" for your donors by constantly reinforcing your relationship with them and the importance of your mission.

- 1) Set aside part of each day for personal communication and keep it sacred. Choose an hour or two at a time and don't allow anyone to use that time for staff meetings, report reading or other routine activities. During this time shut your office door pick up the phone and reach out to some people who you have not been in touch with. You'll be amazed to realize how much the sound of your voice on the other line means to them
- 2) Never eat lunch alone! Use lunch hour as a time to renew acquaintances with someone important to you, either from outside or inside the organization.
- 3) Make time for regular contact. This step is about eliminating those awkward, embarrassing moment when you find yourself calling someone to ask for a favor and having to start the call by apologizing for having allowed many months or even years to pass since your last conversation.
- 4) Overtime expand your list of key contacts – and then make certain that you speak to each person on your list according to a regular schedule.
- 5) Use downtime to maintain personal connections – when you are riding train, taxi etc. pull out your cell phone and catch up on a call or two! You may think that you are too busy to stay in touch with people, but if you start using the time you are currently wasting, you may find that the problem solves itself.
- 6) Introduce your contacts to each other this will allow for them to be free to generate all kinds of new and interesting ideas and activities, some of which are likely to rebound to benefit you!
- 7) The task of different kinds of outreach must be specifically and clearly assigned to someone on your staff, even its one of the many jobs they are responsible for. No matter how small the organization, this is a task that falls through the cracks unless somebody knows that they have to take responsibility for it– more routine connection and more personalized outreach.

**Activity: The ten most important people to focus on**

List the 10 most important people or groups whose philanthropic activities are focused on your organization. *They should be your number one advocates: they may be donors, but could also be volunteers.*

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.
- 8.
- 9.
- 10.

*Now ask what it would look like if these 10 were giving you everything they could. What if your relationship with them was such that you could pick up the phone to call them to seek advice, share wonderful news, brainstorm an idea, enlist help or confirm your personal bond.*

*Next ask what “what more could I be doing to achieve this?” E.g. phone call, letter, email, host breakfast, host dinner part, organize conference, travel to work site.*

Start doing it today!

# Advantages & Disadvantages of Different Fundraising Strategies<sup>12</sup>

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## **Corporate Giving**

A number of companies annually donate a portion of their profits to charity or nonprofit organizations though generally, corporate giving makes up a very small percentage of overall contributions to non-profits.

### **Advantages:**

- You may secure products for auctions or prizes, or sponsorship of events and activities. These relationships can grow and last over many years
- Your organization can get exposure to new audiences and potential donors
- Your organization can gain new skills
- Your organization can utilize the corporate sponsor's staff through volunteering

### **Disadvantages:**

- Generally do not involve ongoing funding
- Corporations may impose guidelines or conditions to their donation
- Corporations may desire board representation
- Corporations may not contribute unless they are headquartered locally or have a large consumer base in your area
- Becoming a charity for a corporation can be competitive and labor intensive
- Relationship management can be complex and time consuming
- There can be conflicts between the corporation's focus and the mission of the nonprofit

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<sup>12</sup> This section was drawn and adapted from: - Investopedia "Government Grant". <http://www.investopedia.com/terms/g/government-grant.asp> and "The donor lifecycle map" by Sarah Clifton (2011).

### **Crowdfunding and Peer-to-Peer**

Crowdfunding and peer-to-peer fundraising capitalize upon social media contacts and relationships. Both are a way to finance projects and businesses through small contributions from a large number of backers. Most typically, they are used to raise funds for a specific project. Crowd-funding tends to be deadline driven and operates as a funding model with a set target. Peer-to-peer funding tends to make more personal appeals.<sup>13</sup>

#### **Advantages:**

- Potential to fundraise for any type of project or activity, generally the more specific and discrete, the better
- The ability to attract a new group of supporters
- Extending your reach via networks of current constituents
- Integration of: fundraising, awareness, public profile, social reach, and campaigning
- Relatively quick method of raising funds
- No complicated applications or waiting periods

#### **Disadvantages:**

- Strong technological and social media skills are important
- All or nothing campaigns can result in no return if project does not hit funding target
- Can result in a public failure if it flops
- Network may fatigue of repeated solicitations
- Supporters may be skeptical of a scam or abuse of funds since there is no regulatory framework involved

### **Government Grants**

Government grants cover a wide range of areas, from arts, education, community development, and technology.<sup>14</sup> The grants are intended to be used on projects that ultimately serve public groups. These funds are typically the least flexible and often follow a very prescribed application process.

#### **Advantages:**

- It may be possible to obtain a significant amount of funding
- The process of obtaining the grant is set and clear
- Government grants can be a source of ongoing funding

#### **Disadvantages:**

- Application process may be long, tedious
- Unspent monies may have to be returned
- Government bureaucracies mean that funds disbursements and reimbursements can be delayed
- Tracking details and reporting back to the government can be time consuming and costly

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<sup>13</sup> Drawn from: <http://www.socialmediaexaminer.com/11-tips-for-crowdfunding-how-to-raise-money-from-strangers/>  
<http://www.thefundraisingauthority.com/internet-fundraising/crowd-funding-your-non-profit/>

<sup>14</sup> Drawn from Investopedia "Government Grant". <http://www.investopedia.com/terms/g/government-grant.asp>

### **Event Based**

Fundraising events are a popular way to generate income. Large-scale events might be a ball, a formal dinner, or an auction. Small-scale events might be hosting a speaker, a breakfast, or a small social event. The most successful fundraising events are fun and feature interesting content. A committed volunteer base can help to plan, organize, and publicize the event. The event should be directed specifically at your target market and not compete with other known events. Truly impactful events feature a direct connection to the organization's mission.

#### **Advantages:**

- A good way to build visibility
- Fun and entertaining for those involved
- Provide volunteer opportunities
- Act as a tool for identifying/cultivating prospective donors

#### **Disadvantages:**

- Can consume significant resources – human and financial
- Can be dependent upon timing
- Potentially high stress to plan and manage appropriately
- Good attendance, and fundraising participation, is required for it to be successful

### **Individuals**

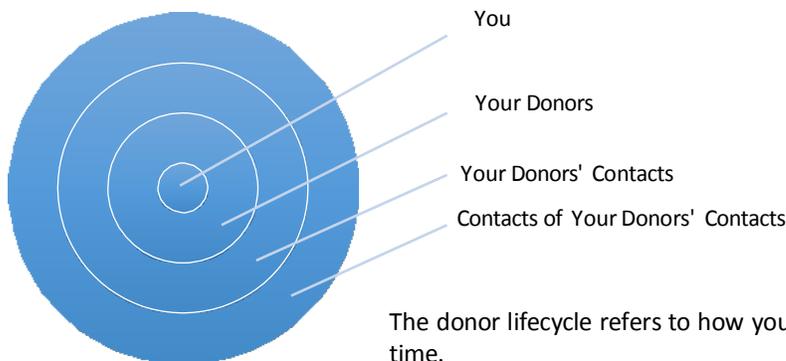
If NGOs have the resources, time and understanding of how to fundraise from individuals, they can be an important source of funding.

#### **Advantages:**

- Funding is diversified
- On-going source that one can build
- Once a giver, also an advocate

#### **Disadvantages:**

- Costly to develop due to small return per individual unit
- Risky for the inexperienced
- Need significant assistance from the organization's board and volunteers

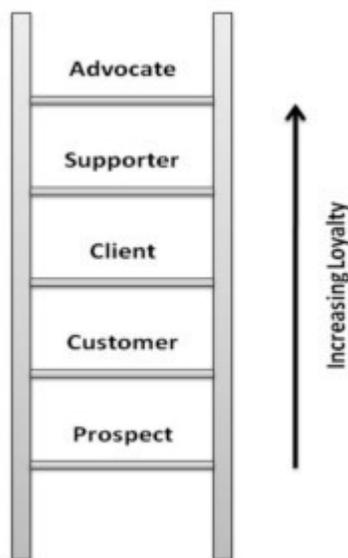


**Stage 1: Find Donors.** In order to find donors, it is helpful to use “viral fundraising” strategies. Your aim is to tap into a vast network of individuals via your donors. Think of your organization’s development efforts as a set of concentric circles. Your organization is in the middle. Your donors are in the next circle – go back to them, cultivate them, get them to help. Your donors’ contacts are in the next circle – develop relationships there, ask for funding, then ask these new donors to introduce you to their rolodex. Systematically, you keep working outward building an increasingly larger fundraising network.

To make contacts and build your fundraising network with a broad base of individuals, take advantage of media events, website announcements, emails, direct mail, and social media.

**Stage 2:** Cultivate the donor relationship over time. Once you have established contact with donors and prospective donors, your aim is to move them up the *loyalty ladder* – develop and enhance the relationship with the donor over time.

Reference: <http://www.eightleaves.com/wp-content/uploads/2010/04/loyalty.ladder1.jpg>



The loyalty ladder has five rungs:

1. Suspect – People who have some contact with your organization.
2. Prospects– People who may be interested in becoming involved or making a donation.
3. Donor – People who give.
4. High value donor – Donors who are loyal and increase the value of their gifts over time.
5. Advocate – Donors who promote your cause, ask others to give, and participate in multiple ways in the life of your organization.

As donors progress up the ladder, you increase the lifetime value of each donor. This simultaneously minimizes costs, as less revenue per donor is swallowed up by administrative expenses. Ultimately, more people give because of your mission than any other single reason.

### **Tapping the great potential of female philanthropists<sup>15</sup>**

The face of philanthropy is quickly changing; it is no longer the billionaire men or robber barons of the 20th century. Today, philanthropy is for everyone, including the women donors who have resources alongside commitment to catalyzing social change. She not only has the financial power to put women and girls at the center of global development strategy but also the leadership potential to inspire others to do the same.

- Know your donor.
- Help her learn from you.
- Help her find a community.
- Share stories as well as statistics.
- Give her time.
- Focus on your pipeline.
- Engage your donor's skills, experience, and talent.
- Frame your "ask" as an opportunity for your funder.
- Expose your donors to other funding opportunities.
- Don't judge.

### **Major Gifts**

For many nonprofit organizations, a significant portion of revenue comes from high-net worth individuals who make major gift donations. Most typically, donors who make major gifts tend to have a personal commitment to your organization and may live in your community. The cultivation of major donors needs to be done in a very personal way. Your Board plays a crucial role in developing and maintaining these contacts. In addition, a skilled Director of Development should be in a position to support this function by identifying and helping to steward donors.

#### **Advantages:**

- Good return on investment (ROI)- relatively low cost method of fundraising for what can often be a high return
- Direct exposure to decision-maker(s) creates the opportunity to influence appropriately to ensure the best outcome
- High donor loyalty

#### **Disadvantages:**

- Potentially long time horizon to cultivate the relationship with the donor
- Relationship management can be time intensive
- Potential unpredictability in terms of whether and when you will receive the donation
- Due to unpredictability, it can be difficult to manage cash flow (particularly on smaller projects)
- Donor circumstances can change and their attention can be taken elsewhere

### **Private Foundations**

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<sup>15</sup> Excerpt from: "Tapping the Great Potential of Female Philanthropists", Jessica Houssian (2012), Stanford Social Innovation Review. Permission to include 200 word excerpt received from Larissa in August 2016 by EMpower. Full article: [http://ssir.org/articles/entry/tapping\\_the\\_great\\_potential\\_of\\_female\\_philanthropists](http://ssir.org/articles/entry/tapping_the_great_potential_of_female_philanthropists)

Primarily, grants issued by private foundations are to fund specific programs that are in line with the purpose<sup>16</sup> or mission of the foundation. Cultivating relationships with foundations is essential to success. Regardless of your size, it is important to show that your organization is financially stable and that it has a strong mix of sources of funding.

**Advantages:**

- Foundations are often flexible about what they can fund
- Foundations may be willing to take risks on new types of projects or locations
- Foundations are often prepared to fund less “popular” causes
- The application process for foundations is relatively simple
- Foundations tend to have a wide range of interests making it possible to find a match to a project

**Disadvantages:**

- Can be more difficult to access a foundation unless you have personal connections
- Some proposals can be lengthy and time consuming
- Few foundations give large grants- not enough to fund salaries or make real impact on capital appeals
- Finding the right foundation for your project can be research intensive
- Foundations can take a great deal of time to respond about whether you have been awarded a grant
- It is not a quick source of funds

**Sports-Based**

Sports campaigns are a great, fun way for your supporters to raise money and awareness for your organization. Social media can be a useful tool to promote the sports event and encourage the athletes who are raising money for your cause. Two main ways are: (1) An athlete or team may sign up for a marathon or similar event and then contact your organization asking if they can fundraise on your behalf; (2) Your organization can actively ask supporters if they would participate in an event or on a team to fundraise for you.

**Advantages:**

- Often very low cost with large potential for raising funds
- It can expand your donor reach
- It is a great way to promote your organization
- It can portray you as active and fun fundraisers

**Disadvantages:**

- Difficult to predict the amount of money that will be raised
- Can be expensive if the organization has to pay for entries in the sports event for athletes
- Athletes may become injured and thus unable to participate in the event.

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<sup>16</sup> Drawn from <http://www.thefundraisingauthority.com/grants/raising-money-from-foundations-1/> reference

**Activity: Deciding which donor to focus on**

Type of donor	Do you have these?	Do you think you can focus on these?	What strengths do you have to pursue this type of donor?	What weaknesses do you have to pursue this type of donor?
Individuals				
Major Donors				
Foundations				
CSR/Corporates				
Events				
Web-based fundraising				
Sports-based fundraising				
Sponsorship				
Multilaterals/Bilateral				
<p><b>Based on the table above, which donors are your priority?</b></p> <ol style="list-style-type: none"> <li>1.</li> <li>2.</li> <li>3.</li> </ol>				

# The 'Art' of Fundraising

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## When to make 'The Ask'<sup>17</sup>

### Timing

- New fundraisers are often told that the average cultivation period is 12 to 18 months.
- Take your time, get to know people, get them fully convinced, and then make The Ask. The fact is that nonprofit leaders often wait too long to invite people to join with them -- so long that it feels awkward and/or feels impossible.
- When you ask someone to partner with you in a concrete way – whether by donating funds or through some other kind of contribution – you raise the quality of the dialogue and elevate both the relationship and the work you will do together. The sooner you can make this happen, the better it is for the both of you.
- Here is a good rule of thumb to follow: if you don't know what to ask for- either a specific sum of money or some other contribution- it's a good indication that you don't really know the prospective partner which means it is too soon for the ask. In most cases, **two or three conversations** are enough to establish a solid foundation of rapport, to switch on the light of urgency inside someone, and to make The Ask.

### **This philosophy runs counter to the conventional wisdom but here is why it works:**

- First, though it seems logical, it is not the case that people get committed to a cause and then make a financial contribution. Experience shows that the cause and effect relationships work in the opposite way: people give first and then they develop their commitment. It's after they write the first check that they start to get involved in a meaningful way.
- Therefore it makes sense to go for The Ask relatively early in your relationship. A financial contribution establishes a kind of foundation for building deeper commitment and involvement. The sooner you put the foundation in place, the sooner both of you can get started on envisioning further plans.
- Second, prospective partners are open to being asked. They would not be talking to you otherwise. People don't need to understand every last nuance of your organization to make a first commitment. Delaying the inevitable request simply sows seeds of doubt, frustration and annoyance. The fact that someone continues to meet you implies that they are interested. Nice as it may be to imagine that a prospective donor asks you first, they seldom do that. They want to be asked – especially when their energy and enthusiasm are at their highest, often early on in the relationship.
- So set aside anxieties and make The Ask when the time is ripe. Even in relationships, the first few dates are very exciting versus what happens in a few months!

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<sup>17</sup> "The Generosity Network: new transformational tools for successful fund-raising" by Jeffrey C. Walker, Jennifer McCreia and Karl Weber (24th September 2013). <http://www.thegenerositynetwork.com/>

## The heart of the Ask

- Many fundraisers assume that The Ask should be centered on the case for support, the logical, data-based argument for the unique value of your work and the social benefit it provides. The case of support is important – but it should not be at the core of your ask.
- Remember there are a lot of NGOs and each one is convinced it has a clear and compelling case for support – a serious problem that demands a solution, a plausible approach developed by experts and a collection of convincing data to support the argument. If your prospective donor is like most philanthropically-minded people, s/he has probably heard that pitch for support from a great many non-profits.
- So trying to persuade people on facts alone is not going to be enough to motivate them. What sets your organization apart from all the others is the one thing you have that is unique – your story. There is a special power of narrative to bring ideas to life, to connect people heart to heart and to light the fire of possibility within the minds of an audience. **Your request narrative is the single most important weapon in your toolkit.** Lead with story and use facts, information and logical data to support the story.
- When your prospective partner see themselves as a vital part of the compelling story, The Ask feels effortless because they can envision an exciting, enriching, future where they are partners with your organization. With your guidance, they will write themselves into your narrative.

## Story Structure

### A story of self

- This portion of your narrative describes how and why you became involved in the mission of your organization.
- Be clear, specific, and as vivid as possible in painting a word picture of the experience that opened your eyes to the importance of the cause and ignited the passion that drives your work. It is paradoxical but true: the more deeply personal, heartfelt and uniquely individual your story, the greater the chance that it will conjure a powerful connection with the hearts of your listeners.

### A story of us

- This is the part of the conversation when it will be natural and appropriate to talk about the unique strengths and capabilities of your organization. Explain why your team is especially suited to tackling the mission you have chosen and why you need and want partners to continue and extend the work. Explore what everyone in this special circle has in common and the individual gifts they bring. Ideally, you would like to leave a prospective donor with the feeling: I have a unique role to play in making this vision come true.

### A story of now

- Explain how the world will be different and better when you succeed. Use specific examples of how individuals' lives will be transformed by the work you are doing. It may not be logical, but most people find the story of a single person far more compelling than a collection of statistics demonstrating even how thousands or millions of people will benefit from a program.
- Then having excited your listener with a vision of the kind of change you hope to create, you can clinch the deal by simply inviting them to join you through some concrete specific behavior.

Focus on the positive potential in a timely response to urgent needs. If the problem you are addressing is at a tipping point, where action now can produce cascading long-term benefits, say so! If you are pioneering an exciting new approach that may lead to a much needed breakthrough, explain it! Such narratives have potential to create a hopeful sense of urgency inside the listener, which is far more effective than one that is imposed by anxiety i.e. horrific images.

### **The Language you choose**

- The exact words you use when making The Ask can dramatically impact your effectiveness and the results you will achieve.
- We are taught to say- *would you like to* consider a gift of X? But saying – *we would like you* to consider a gift of X - is more effective language. This change from *would you consider* to *we would like you to consider* may seem insignificant. But the subtle alteration in language gives my invitation a confidence and authority that it did not have before. Rather than asking a potential partner a question (to which s/he can answer yes or no) by asking this way we are asserting what we want (and tactically challenging the partner to respond appropriately).
- We recommend against using the word “help” to define what you are asking (e.g. I hope you will be able to help us with this project). This formula subtly defines you and your organization as needy, weak, and insecure. Instead try: *I hope this project is something you and I can work together on*. The language here conveys that the organization and the donor are partners, sharing their efforts on behalf of a common cause – which is both a more emotionally appealing depiction of the relationship and a more accurate one.
- When asking for money, try asking for a specific amount and not a range. Obviously, the donor is free to give whatever s/he chooses, so a request for a specific sum carries no compulsion. But requesting a definite amount is more assertive and less hesitant than suggesting a range and, in our experience, yields a larger commitment.
- Finally, and this may be one of the most difficult recommendations we will offer – after making The Ask – be silent. Let the prospective donor absorb your invitation, think about its meaning and seriously consider its potential impact on him/her. You may feel an impulse to end the silence with chatter or softening or back-peddling on the request. Don’t yield to that impulse. Instead just let the silence be. You have made an important request that deserves to be taken seriously. So listen generously and give the concept some space to flower.
- If you have laid the groundwork thoughtfully you may be pleasantly surprised with the answer.

### **When the answer is no**

This can happen even if you have prepared a lot. The temptation is to withdraw turtle-like into your shell. These are normal reactions yet counterproductive. Now is not the time to waste energy on hurt feelings. You want to find out the reasons for the no and discover what, if anything, you can do to reverse it.

### **Four powerful follow-up questions**

Never leave the meeting without understanding the real reason behind the no, which in turn, will enable you to respond to that answer in a way that is genuine, meaningful and helpful to your would-be partner or to any future donor that might have similar concerns.

#### **Question 1 - it seems as if you like our organization and the work we are doing. Is this true?**

- Most prospects will answer yes to this question. Use your instincts to gauge the depth and sincerity of that answer. If you feel it is lukewarm or halfhearted then follow up with a tactful probing question designed to test that feeling (e.g. are you thinking that our organization may not be a good fit for your needs and interest at this time?)
- If, on reflection, your prospective partner has decided s/he simply does not see a fulfilling role for him/her self in your organization, it may be best to shift the conversation to other topics such as where there are different ways that you two can connect that will be more mutually beneficial.

#### **Question 2 – we have been talking about our project X and the kind of support we need to make it a reality. Do you need to know more about the project?**

- If the potential partner seems to have a sincere interest in and appreciation for your organization, then the problem may be lack of clarity about the specific project or program you’ve sought to connect him/her to. It is possible the prospective donor doesn’t have enough information on the potential impact & urgency of

his/her gift. If you sense this may be the case, ask straightforwardly what is unclear or not compelling.

- Remember, philanthropy is a learned behavior and your job is to play the role of a mentor and guide. It's okay if a donor needs more time and information to consider the gift decision – you want thoughtful partners rather than impulsive ones. But don't let an information gap become a permanent obstacle.
- Listen thoughtfully to any questions and objections that your prospective donors may have and work together to resolve them, and thus keeping the door open to a gift, even if in the future.

**Question 3 – is the donation amount I've suggested right for you? If this is the problem, it may be resolved simply. Ask the donor for a more appropriate figure.**

- If a financial gift is difficult, then shift to an equally non-financial contribution that may be more appropriate.

**Question 4 - is the timing of the financial gift an issue for you? If so, what if we spread it out over X years or defer your first payment till X? I would like to come up with a scheduling strategy that will work for you.**

- When the reason for the hesitation is timing, it may tie into the amount you have suggested. Very often a donor actually wants to make a gift but feels unable to finance it all in cash. This is when planned giving can play a role. It is a useful tool to help your partners reach their philanthropic goals. E.g. We can be financed over years, or you can make that gift in securities and cash, or pledge it now but give some of it later.

The **key is not to overreact to a NO**. In most cases a No is not the end of a relationship but rather the beginning of a new phase of the conversation.

### 1) Learn to Really Listen

- There are the usual tips of listening -- lean forward when you are talking to someone, make eye contact, reflect back what you have heard. But listening is also more about a way of being. It is about attention and awareness and genuinely wanting to hear someone else's story.
- Take a moment to reflect on what it felt like the last time someone really listened to you. What happened? What was the experience like? Sometimes when we are trying to forge a connection, we might interrupt people when they are telling us their story so that we can tell them something similar that has happened to us. It is usually a well-meaning attempt to make a human connection with the other person.
- The reality, though, is that when we interrupt someone's story to tell ours, we are subtly tuning the attention back on us, demonstrating unmistakably that we are not really listening but rather thinking about ourselves. The next time someone is telling you a story try not to interrupt at all. Just listen to the other person, to the very end. There is incredible power in that simple act of being fully present.

#### Four levels of listening:

1. **Downloading** - yeah I know that already, listening to reconfirm what I already know. Listening from the assumptions that you already know what is being said; therefore you listen only to confirm habitual judgments.
2. **Factual** - "Oh I didn't know that": listening to pick up new information. Factual listening is when you pay attention to what is different, novel, or disquieting when contrasted with what you already know.
3. **Empathic** - "I know exactly how you feel" listening is to see something through another person's eyes, forget one's own agenda. This is when the listener pays attention to the feeling of the speaker. It opens the listener and allows an experience of standing in the other's shoes and allows deep connection on multiple levels.
4. **Generative** - "I can't explain what I just experienced" listening from the field of possibility. It is difficult to express in linear language. It is a state of being in which everything slows down and inner wisdom is accessed. In group dynamics, it is called synergy. In interpersonal communication, it is described as oneness and flow.

**Which level of listening do you habitually employ? When was the last time you managed to get below levels 1 and 2?**

## **2) Trade dependency for partnerships**

- Make it a partnership rather than a client relationship. Client comes from the Latin word clinere, which means to lean against. We prefer words such as partner which implies two individuals of equal strength who choose to work together - a peer-to-peer relationship model that is far more fruitful in the long-term.
- Members of a partnership don't lean on one another as clients of, they share everything they are and everything they have and so gain greater strength from one another.

## **3) Turn attachment into commitment**

- Attachment = what can you do for me?
- Commitment = what can we do together?
- Attachment limits possibility whereas commitment opens it up.
- One way to tell if you are attached or committed is to ask yourself whether a particular relationship is becoming more constricted over time or even more open. Are you able to talk about more things, share more ideas, experiment more freely, push each other more positively and evoke each other's strengths more than the past? Or are the possibilities shrinking over time?
- When you climb to the highest levels of fundraising, you grow from a salesman into a mentor, team builder, and leader - someone who helps produce music that is far more beautiful than what any individual can create alone.

## **Keeping the Communication Channels Open**

- Many organizations fall into the trap of focusing on fancy quarterly reports or an annual report and a solicitation for donation, and this becomes the only time that their donors hear from them. Don't make this mistake. Talk to your donors often, by phone, email, newsletters, websites, Facebook. The message does not need to be highly personalized all the time, but should always include something of substance e.g. story from a field, details of new initiatives.
- Keeping people informed is very important. Sharing facts and statistics about your performance is one aspect of transparency that needs practice to pursue the kind of connection you aspire to enjoy with partners. You never know which data point may turn out to be the one that triggers a powerful reaction on the part of the partner, so it is important to share many different kinds of stories and metrics.
- But just as important as information is connecting on a human level, beyond facts and data. Human connections are more important than organizational goals - treat people as the living, breathing, emotional being they are – this is an essential element in establishing and nurturing those connections.

## **Some tips**

- Set aside time each day for personal communications with donors or prospects and keep it sacred - reach out to those people. Make lunchtime an opportunity to deepen and expand your human connections in the context of your work.
- Make time for regular contact. Over time expand your key list of contacts - create a more extensive written list of important donors, partners, allies, and friends of your organization and then make certain you talk with each one on a regular schedule you maintain.
- Use downtime to make personal connections - when you are in a taxi, train, bus or a meeting when you are at an airport in a line, pull up your phone and make a call or two or carry stationary with you and size spare moments to jot down personal notes which you can drop in the mail.

## **The First Meeting**

- Even people who are busy are willing to share 20 or 30 mins of their time with a visitor who comes with a referral from a respected source - as most people who are likely candidates to donate money, time or other resources to a cause are fairly open to the idea of a brief, informal meeting. (A bigger challenge is to convert the first meeting into a second meeting and the start of a true relationship with potential for growth, discovery and mutual benefit).

### **Setting the tone**

- In planning the first meeting with a potential partner, have a clear sense of purpose. Rather than pleasant chitchat, you are making a very intentional effort to indulge your prospective partner- and yourself- to take some real risks: of being transparent, and of revealing something about oneself without knowing first what the reaction will be. The ultimate purpose is to find an area of common ground where you and your potential partner can work together on a project or cause in a way that you will both find meaningful, rewarding and even transformational.
- Launching a conversation with this goal is an art form that requires clarity of purpose, self-confidence, self-knowledge and a genuine sense of concern about the wellbeing of others. You can help ensure that the right tone and attitude are created and maintained throughout the conversation by paying close attention to certain important details.

### **Don't meet in the office.**

- The office is the most common place for conversation – yet in many cases it is the least appropriate place. It is where people are thinking about business: they are surrounded by files, papers, their phones are ringing and periodically the door might open for just one quick question from colleagues. The psychological, social and spiritual atmosphere of the office is rarely conducive to a truly open exchange.
- The office is a place where we generally wear masks, and often armor. This is precisely the kind of mindset you are hoping to break down and replace with an attitude of self-reflection, sharing, transparency, exploration and growth. Achieving this in a wildly dissonant environment is incredibly difficult, no matter how gifted a communicator you may be. So avoid the office. A restaurant is a much better option.

### **Stick to a one-on-one meeting**

- If the participation of another team member seems crucial then only make it a two-on-one meeting (e.g. the person who introduced the two of you needs to be there). Avoid the temptation to bring along more colleagues for support. It is harder to authentically connect with someone in a group of three or more. The smaller the group, the greater the likelihood that the conversation will be informal, relaxed, spontaneous, and open with the possibility of real human connection as the result.

### **Don't go blindly, but don't over-prepare**

- Although you are meeting the potential donor for the first time, you know at least a few facts about her/him (who introduced you and what she told you, a CV or a Bio). Your goal should be to get past the mere data points on a resume or fact sheet and transform those facts into a springboard for exploring the inner human reality behind the facts and sharing what makes you tick as well.
- Use “why” questions to create the possibility of open dialogue. Questions that ask for more questions can be a powerful tool. “Why” questions are crucial to understanding the nature of your new acquaintance’s personal philanthropic journey. The more you know about the why behind a person’s life choices, the easier it will be for you to really understand what shapes their thinking and behavior – and the closer the connection you may be able to forge between her, yourself and a worthy cause that’s appropriate for you both.
  - Why did you first get involved in supporting arts-education?
  - Why do you have such a passion for children’s rights?

- Why did you choose cancer research as the focus of most of your giving?

**Describe your cause in positive terms:**

- I am passionate about my work because I want a healthy and sustainable planet (rather than I work on the environment because I'm against the degradation of the planet, or I am against unaccountable corporations). When we set-up our conversation in terms of opposing forces, we're tapping fear as our chief motivating factor. We stimulate anxiety that the "right side will lose". This can be intensely motivating for a while. But over time, humans tend to become weary of endless struggles. Eventually we succumb to battle fatigue or in the case of nonprofit work compassion fatigue. People lose interest and drift towards different activities that promise more positive benefits. A subtle shift from "against" to "for" is enormously powerful.
- When you meet with a potential donor for the first time, don't lead with a case of support to show your idea is better than someone else's, or why the world would fall apart if you did not receive a donation today. You should stir something inside that is meaningful.

**Don't rely on props when you are nervous in a conversation.**

- It is easy to use documents, slide shows, videos and other presentation tools as crutches. Rely on your most powerful and effective presentation tool: your physical, emotional and mental presence.

**"Name drop" only with a purpose**

- Don't name drop simply with the goal of impressing someone with the fame, power or wealth of your partners – it may come across as boasting and reduce your chances of an open person-to-person encounter. It may bring on the thought that these people are so well connected they surely do not need my contribution. Instead use names and stories of other partners to model behavior and experiences for the potential partner – to vividly illustrate how giving and participating has been rewarding and enriching for others and to suggest that the potential partner is likely to find it equally meaningful!

**In the case of a first meeting, you and your partner may be distracted by one of the most common "fundraising elephants". Is this conversation about fundraising?**

- Is everything we are going to speak about today just a courtly dance leading up to a request for money? In the first meeting, it is best not to ask for a financial contribution. We suggest you open the conversation by clearing the elephant out of the room. Say upfront: I am not going to ask you for a gift today. Once you make this clear at the beginning, you can make space at the start of the relationship to really listen, and for your partner to get to know you.

**However, there are things that you can ask for in the first meeting**

- Including a second meeting!!!
- Networking contacts – who else do you know who would like to hear about our organization?
- Ideas and insights – what suggestions about our work do you have for us to consider?
- Technical skills – we have been trying to solve problem X, do you have any advice for us, or can you connect us to someone who does?
- In kind gifts – can your company provide us with some of the goods and services we need to expand our work?
- Organizational resources - are there people or departments in your company who should get involved with our cause?
- Time and talent - can I sign you up to participate in our next volunteer-training session?
- Leadership - would you like to consider a role on our Board, our advisory council, or another part of our team?

**It almost does not matter what you ask for- but get into the habit of asking for something.**

- It strengthens your confidence when the time comes to ask for a financial donation, it creates a built-in opportunity to follow-up with your new partner a few weeks later, and it helps establish

a bond that makes an additional commitment feel easier and more natural.

**You should also ask for a second meeting.**

- In most cases, the initial meeting will have been scheduled for a brief amount of time. But if all has gone well, your new partner will be willing to offer more time for a second meeting. We suggest wording your request for a second meeting like this: I am so grateful for the time we have had together today. It seems there is a lot more for us to explore. Can we schedule another visit to go deeper into some of the topics we touched on this morning?

**Finding Meaning in Every Conversation**

- Leave behind the selling strategies and presentation techniques. Forget the tricks you may have developed in past experiences as a fundraiser. In fact, shed the very role of a fundraiser and think of yourself as simply a human being sharing a bit of yourself with another human being. The goal is not to convince, impress, or manipulate, but connect on a genuine emotional and psychological level.

**Exercise**

List the ten most important people or groups whose philanthropic activities are focused on your organization.

They should be your number one advocates - they may be donors, but could also be volunteers.

Now ask what it would look like if these ten were giving you everything they could.

What if your relationship with them was such that you could pick up the phone to call them to seek advice, share wonderful news, brainstorm an idea, enlist help or confirm your personal bond.

Next ask what more could I be doing to achieve this? E.g. phone call, letter, email, host breakfast, host dinner party, organize conference, travel to work site.

# Reconsider the Concept of Overhead

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The concept of overhead can bring up discomfort for donors and grantees alike. Donors often don't want to pay for it and grantees know they have real costs and need it. This situation is clouded more by differing definitions and categorizations of overhead – very little is standard across the nonprofit field.

Overhead refers to the administrative and fundraising costs of an organization. Administrative costs include items such as rent, utilities, planning, information technology, financial management, etc. These, together with fundraising, are critical for an organization to fulfill its mission and succeed. Most of these are treated as overhead (or indirect costs) because they are not directly connected with any particular program the organization operates, but rather support all of its programs.<sup>18</sup> The important point is that each organization must clearly define overhead or indirect costs.

One of the issues with “overhead” is that the name evokes an image of costs that are ‘on top of’ or ‘above and beyond’ “real costs”, rather than being seen as essential to the core activities, including programs, of an organization. Another issue that contributes to the ‘bad name’ of overhead is the sense that overhead costs are bad and should be minimized or cut, whenever possible.

As Dan Pallotta, author of the 2010 book, [Uncharitable – How Restraints on Nonprofits Undermine their Potential \(Civil Society: Historical and Contemporary Perspectives\)](#), points out, depicting overhead as bad is a fallacy that deprives nonprofits of necessary resources in several distinct ways.

- Employee compensation is far lower in most nonprofits than in comparable for-profit businesses.
- Funds for advertising and marketing (2% of revenues) are much less in the nonprofit world than for-profit worlds.
- Funders are far more willing to underwrite worthwhile risks on the part of the for-profit business than with most nonprofits.
- Funders have a longer time horizon when investing in for-profit companies than when donating to nonprofits which means nonprofits are expected to show impressive results more quickly than their for-profit counterparts.
- You need money to pursue your goals, just like any manager at a for-profit company.
- There is nothing to be embarrassed or apologetic about especially since in exchange for your pay, you are providing people with something priceless: the opportunity to live lives that are deeper and more rewarding through their connection with your cause.
- If an organization in the nonprofit sector is going to grow in size, effectiveness, and reach the way for-profit companies do, there needs to be an investment in leadership.
- It's time for a fearless conversation about these issues – which has to start with a fresh, more realistic attitude on the part of nonprofit leaders themselves.

Paul Brest, a leading voice in the field of philanthropy and former president of the William and Flora Hewlett Foundation (2000-2012), points out that the end goal of any organization (profit or nonprofit) is to optimize costs, not minimize them.<sup>19</sup> Costs are appropriate and necessary when they increase an organization's ability to

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<sup>18</sup> Unmi Song, President of the Lloyd A. Fry Foundation in Chicago, differentiates indirect costs from administrative overhead with indirect = "fixed costs" (as compared with variable costs). She argues that what most people think of as indirect costs – such as rent, utilities, office supplies, technology – are not administrative or overhead costs. They are program costs and should be in all program budgets, as it is impossible to run a program without these expenses. In her view, such expenses should be appropriately allocated across all programs.

<sup>19</sup> Unmi Song, President of the Lloyd A. Fry Foundation in Chicago, differentiates indirect costs from administrative  
EMpower –The Emerging Markets Foundation

achieve its mission and provide a net increase to the impact the organization is creating. This kind of impact and change requires whole systems and infrastructure, well-thought out plans, technology, top talent, and a clear understanding and management of financial resources. In other words, it requires capital -human, intellectual, financial, and physical. He emphasizes that costs in and of themselves are not bad – in fact, costs that contribute to an increase in an organization’s effectiveness and ability to reach more people are good. He explains that in the for profit sector, the idea of necessary and justified costs is well understood and the same principles should be applied to the nonprofit sector:

“To use an example from the business sector, assume that a widget manufacturer’s only mission is to make a profit for its owners. Then, an additional administrative expense of 1¢ is justified if it is likely to produce an additional 2¢ of profit. The underlying idea is not different for nonprofits. Their missions are to achieve particular social, environmental, educational, religious, health, etc. goals. And an incremental expense is justified to the extent it has the potential to increase the organization’s net social value.”

Phil Buchanan, president of the Center for Effective Philanthropy and a columnist at the Chronicle of Philanthropy *Relates to the Overhead Myth*<sup>20</sup> – the false conception that financial ratios are the sole indicator of nonprofit performance, explaining that donors often gravitate to overhead ratios when they can’t get their hands around anything else. Buchanan says that overhead varies depending on the work being done, on the context, on the industry (or field), on the competitors (or other players), and on the stage of evolution of the business (or nonprofit). Just as approaches to overhead vary between a dry cleaner (who might have little overhead) and a technology company (which might have higher overhead due to R&D), so too do they vary across different types of nonprofits. For donors, he believes the primary focus should be on results: what has been achieved – and will be achieved – by a program or organization relative to its costs.

#### *The Nonprofit Starvation Cycle*<sup>21</sup>

In 2009, the Bridgespan Group wrote an article published in the Stanford Social Innovation Review where it coined the term “The Nonprofit Starvation Cycle” which is still widely cited today.

“The cycle starts with funders’ unrealistic expectations about how much running a nonprofit costs, and results in nonprofits’ misrepresenting their costs while skimping on vital systems—acts that feed funders’ skewed beliefs.”<sup>22</sup>

The Nonprofit Starvation Cycle consists of 3 Stages:

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overhead with indirect = "fixed costs" (as compared with variable costs). She argues that what most people think of as indirect costs – such as rent, utilities, office supplies, and technology – are not administrative or overhead costs. They are program costs and should be in all program budgets, as it is impossible to run a program without these expenses. In her view, such expenses should be appropriately allocated across all programs.

<sup>20</sup> In 2013, GuideStar, BBB Wise Giving Alliance, and Charity Navigator wrote an open letter to the donors of America in a campaign to end the Overhead Myth and asked that other factors of nonprofit performance be paid attention to: transparency, governance, leadership, and results. The letter states that while financial ratios can help identify cases of fraud and poor financial mismanagement, in most cases, the focus on overhead (administrative and fundraising costs) without consideration of other critical dimensions of a nonprofit’s financial and organizational performance does more damage than good.

<sup>21</sup> [https://ssir.org/articles/entry/the\\_nonprofit\\_starvation\\_cycle](https://ssir.org/articles/entry/the_nonprofit_starvation_cycle); (2009); Ann Goggins Gregory is the director of knowledge management at the Bridgespan Group and Don Howard is a partner at the Bridgespan Group.

<sup>22</sup> <http://www.geofunders.org/storage/docs/2014conference/overhead-artifacts.pdf> (2014)

1. Donors' Unrealistic Expectations – Without accurate data, donors do not know what overhead rates *should be*, and thus rely on numbers provided by their grantees. Nonprofits are often reluctant to be honest (and risk funding) and end up promoting unhealthy overhead levels even if they know that they do not cover all their overhead expenses. This fuels unrealistic expectations about how much it really costs to fund an effective program.
2. Underfed Overhead – Stage 1 feeds into Stage 2: pressure on nonprofits to conform to unrealistic expectations, resulting in a “low pay, make do, and do without” culture<sup>23</sup> – operating with non-functioning computers, staff members who lack training needed for their positions, decrepit furniture etc. – all of which contribute to an organization’s ability to deliver quality services to its beneficiaries.
3. Misleading Reporting - Researchers in the Nonprofit Overhead Costs Study found that more than one third of the organizations reported no fundraising costs whatsoever, while one in eight reported no management and general expenses. 75 – 85% of these organizations were incorrectly reporting the costs associated with grants. Bridgespan’s research of four youth-serving nonprofits likewise reported discrepancies between what nonprofits actually spent on overhead and what they reported spending.

Recommendations to define, accurately capture costs in overhead, and explain it to funders:

1. Develop a clear definition of overhead. Commit to understanding real overhead costs and infrastructure needs. Dig into your costs, analyze your current systems, and identify gaps in capacity. With this, develop a clear plan to meet your organizational objectives inclusive of *all* inputs (including overhead such as a strong monitoring and evaluation system), to diagnose which actions cause your desired outcomes.
2. Have an honest conversation with your donors about what it will take to deliver expected outcomes or to deliver these outcomes at an even higher level of quality or quantity. Agree upon what you are all trying to achieve and define what success looks like.
3. Where possible, advocate for general operating support to allow more flexibility – this kind of support takes into consideration a greater scope of what an organization actually does. When donors fully understand their grantees’ operations, they are more likely to meet their grantees’ needs.
4. Continuously educate your donors. Initially, donors may not want to pay for an organization’s rent or utilities, but these are essential components of everyday work. You cannot run a high-performing organization from your car. There are many ways to explain these types of expenses to donors.
5. Because donors have different appetites and allergies when it comes to funding costs, consider how to get costs covered according to their interests. For example, a funder from the finance sector may have no problem paying for part of an accountant’s salary or for an annual audit, whereas another funder may be more amenable to paying rent knowing that being in a safe, central location may allow more staff and especially beneficiaries to get to the space readily.
6. Consider making the “parity” argument – that it is only fair that each funder pay a proportionate (or small) amount of the organization’s costs so that a small handful of donors are not penalized with more costs. You might say that it jeopardizes your ability to raise funds if not all donors carry some portion of the shared weight.
7. Describe ways that your organization is cost-effective and continually monitors costs (for example, getting

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<sup>23</sup> Coined in the Nonprofit Overhead Costs Study, a five year research project (1999 – 2004) conducted by the Urban Institute’s National Center for Charitable Statistics and the Center on Philanthropy at Indiana University. The researchers examined more than 220,000 US nonprofit tax forms (IRS Form 990s) and conducted 1,500 in-depth surveys of organizations with revenues of more than \$100,000.

multiple bids for larger contracts, benchmarking against other organizations, periodically reassessing all vendors). Embedded in some resistance to 'overhead' is the generalized concern some donors may have about excess or waste. Indicate concrete ways that you are cost-conscious to ease donor discomfort.

# Tools to help you fundraise

While we were compiling this workbook we came across some great resources that we would recommend for your further reading. Please have a look at these guides for your further thinking and planning.

## 1. Fundraising for Success: A Guide for Small and Diaspora NGOs

Reference: Mehta, Ajay. "Fundraising for Success: A Guide for Small and Diaspora NGOs". Common Ground Initiative. INTRAC, 2012.

This guide aims to share information, tools and tips to help small and Diaspora organizations strengthen their fundraising. It looks at:

- Principles behind effective fundraising
- Developing a fundraising strategy
- Implementing and monitoring a fundraising strategy

<https://www.intrac.org/resources/fundraising-success-guide-small-diaspora-ngos/>

## 2. Writing a fundraising proposal toolkit

Reference: Shapiro, Janet. "Writing a fundraising proposal toolkit". CIVICUS: World Alliance for Citizen Participation.

In this article you can find information that deals with planning and researching a funding proposal before writing, description on how to write the proposal and the follow-up required once it is written and sent off. There is also an example of a funding proposal for better explanation. There are also guidelines on what to put into the proposal and how to write it.

<https://www.intrac.org/resources/fundraising-success-guide-small-diaspora-ngos/>

## 3. Fundraising for change - A practical guide for Women's Rights Organizations

Reference: "Fundraising for change - A practical guide for Women's Rights Organizations." Global Fund for Women.

This article highlights the increasing role for women participation in fundraising. It discusses about money for women rights, preparation for fundraising and different fundraising strategies.

[https://www.globalfundforwomen.org/wp-content/uploads/2006/10/fundraising\\_handbook\\_english\\_2014.pdf](https://www.globalfundforwomen.org/wp-content/uploads/2006/10/fundraising_handbook_english_2014.pdf)

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## 6. Bohns, V.K., "A Face-to-Face Request Is 34 Times More Successful Than an Email" Harvard Business Review. Online. Available at: <https://hbr.org/2017/04/a-face-to-face-request-is-34-times-more-successful-than-an-email>

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## Elevator Pitch<sup>24</sup>

A brief and concise summary statement to try to sell the merits of your organization. It is akin to a sales pitch in that your goal is to persuade your audience to buy into what you are speaking about and would likely focus on your organization's mission, values, goals, etc.

It is a short summary statement of 30 seconds to 2 minutes in length, to introduce your organization and mission OR a particular project or yourself as a member of the organization.

- Know your audience (person, group). Who are you giving the pitch to? What do they want to know? What would be the most persuasive way to tailor your pitch? How can you best capture the listener's attention?
- Present involvement with your organization as an opportunity for the listener. You want the listener to believe in the impact of your organization and to be called to action.

Successful elevator pitches are:

1. Quick
2. Concise
3. Tailored to the person or audience to whom you are speaking
4. Compelling- they spark interest
5. Memorable- they highlight something unique or different about the organization
6. Begetting-they lead to deeper dialogue or action

Pitfalls to avoid:

1. Use of jargon or hard to understand terminology
2. Too much detail
3. Lack of focus or take away message
4. One sided – the pitch does not open the door for further conversation
5. Sounding rehearsed or unnatural

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<sup>24</sup> This section draws on: <https://www.mindtools.com/pages/article/elevator-pitch.htm>; <https://www.alumni.hbs.edu/careers/career-resources/Pages/networking.aspx>; <http://theundercoverrecruiter.com/how-create-your-memorable-elevator-pitch-four-simple-steps/>

**EXAMPLE: Shorten, Simplify, and Clarify the Mission Statement**

**EMpower mission statement:** “EMpower -The Emerging Markets Foundation is a not-for-profit organization that connects the resources of Emerging Markets (EM) professionals worldwide with the vitality of local organizations in emerging market countries.”

**Let’s reword it.**

*EMpower supports local organizations in 15 countries so that youth living in poverty get the skills and resources to lead healthy, productive lives.*

**Elevator Pitch Worksheet**

**Shorten, simplify, and clarify the mission statement**

1. What is the mission statement of your organization?
2. What are the main ideas of your mission statement?
3. How can you shorten and simplify the mission statement?
4. Can it be further re-worded to use plain language (eliminating jargon)?

**Prepare the content of your statement:**

5. Who is your audience?
6. Using your shortened mission statement, explain what your organization does. What problems does it address? (BRIEF!)
7. What is unique about your organization? What sets you apart from other groups?
8. What do you personally find most exciting and inspiring about the organization? What are you most passionate about?
9. What is the call to action? How can you engage the audience in next steps?
10. What ways can you facilitate the audience joining your cause?

Make sure to test your pitch and get critiqued (by peers, colleagues, board members) in order to assess strengths & weaknesses, and see if it inspires action!

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## The 'art' of fundraising

- From the Storytelling Non-profit "21 Ideas to Refresh Your Stewardship" by Vanessa Chase. <http://www.thestorytellingnonprofit.com/blog/21-ideas-to-refresh-your-donor-stewardship/>
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- Asian Charity Services. For more information visit - [asiancharityservices.org](http://asiancharityservices.org)
- "A guide to writing a fundraising strategy" by Klair Price, GRANTfinder Senior Information Researcher, 2013.

## Tools to help you fundraise

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- "A guide to writing a fundraising strategy" by Klair Price, GRANTfinder senior Information Researcher, 2013.<sup>25</sup>

- Asian Charity Services, ACS Fundraising Strategy Project Pre-Workshop 2 Homework

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<sup>25</sup> Permission to include - note on the website "Reproduction is authorized, except for commercial purposes, provided that the source is mentioned and acknowledged. Idox claims no copyright on any official document."

