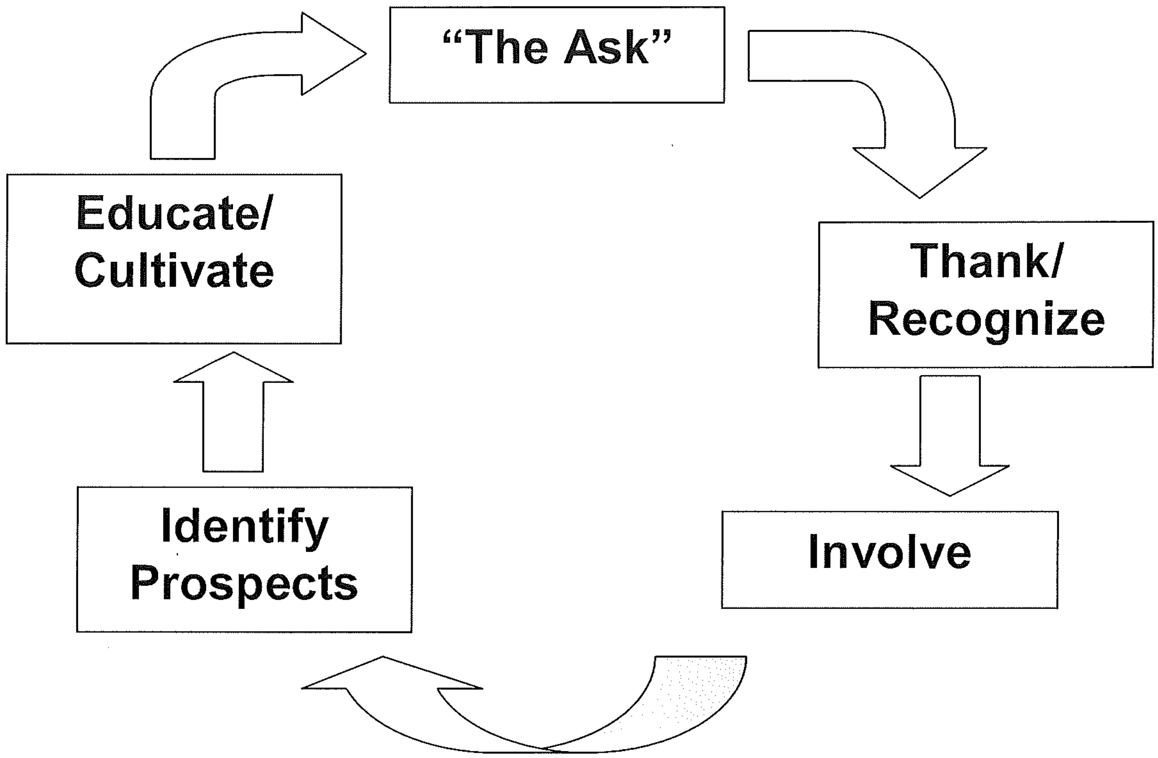
Cycle of Fundraising



Involvement at any point in this cycle is part of fundraising,
and involvement at every point is needed!

Philanthropy in America

2008: $307 billion in private money was given to nonprofits. (Does not include government funds or earned income.)

Where did it come from?

- 13% Foundations
- 5% Corporations
- 75% Individuals
- 7% Bequests

More than half of this money came from middle class, working class, and poor people – in other words, people like you.

- 68-70% of households contribute
- The typical household supports 5-10 organizations per year.
- The median amount contributed per household is $1,300-$2,000 per year.

Sources: *Giving USA*, www.givingusa.org; *Grassroots Fundraising Journal*, www.grassrootsfundraising.org, National Center for Charitable Statistics, nccsdataweb.urban.org.

Income sources for nonprofits

Grants	* Foundations * Corporations * Public charities * Government * Service clubs * Faith-based
Individuals	* Membership * Major gifts * Monthly giving * Benefit events * Workplace giving * Planned gifts
Earned	* Goods * Services * Publications * Investment income * Cause-related marketing

Adapted from Andy Robinson, *Selling Social Change (Without Selling Out): Earned Income Strategies for Nonprofits,* Jossey-Bass, 2002.

Your Income Diversification

Organization: ______________________________________

Year founded: ________

	Last year's actuals		***Current year budget***		***Goals for ____________***	
	Amount of income:	*Percentage of total:*	*Amount of income:*	*Percentage of total:*	*Amount of income:*	*Percentage of total:*
Foundations						
Corporations						
Government						
Membership dues and donations						
Board giving						
Major donors[1]						
Benefit events						
Earned income (sales, fees, etc.)						
Investment and interest[2]						
Other (specify):						
Total:						

[1] You define "major."

[2] Includes income from endowments.

BASIC PRINCIPLES OF FUNDRAISING

1. Identifying your prospects. In general, prospective donors must meet at least two of the following three qualifications:

Ability –	Do they have any available money to give?
Belief –	Do they care about your issue, programs, etc.?
Contact --	Do they have a relationship with any of your board members, staff, or major donors?

2. The closer you get, the more you raise. As the old saying goes, people give money to people, not organizations. Therefore, you want as much human contact with the donor as is reasonably possible. In terms of solicitation strategies, the following list descends from most effective to least effective:

A. Personal face-to-face; team of two preferred over one
B. Personal letter on personal stationery; telephone follow-up will improve results
C. Personal phone call; follow letter will improve results
D. Personalized letter
E. Impersonal letter (direct mail)
F. Impersonal telephone (telemarketing)
G. Fundraising benefit/special event
H. Door-to-door canvassing
I. Media/advertising

3. The gift range chart. In a typical annual campaign – the money that organizations raise each year for general support –

10% of the donors yield 60% of the money;
20% of the donors yield 20% of the money;
70% of the donors yield 20% of the money.

In other words, most organizations rely on a handful of major donors to generate the majority of their unrestricted income. Using this principle, you can set your goal and then calculate how many donations at each level you'll need to meet that goal. For example, for a $50,000 annual campaign:

$ Gift Range	# Gifts	# Prospects	Total $ per Range
$2,500	2	10 (5:1)	$5,000
$1,000	5	25 (5:1)	$5,000
$ 750	10	40 (4:1)	$7,500
$ 500	15	60 (4:1)	$7,500
$ 250	20	60 (3:1)	$5,000
10% of donors			50% of goal
$ 100	100	300 (3:1)	$10,000
20% of donors			20% of goal
under $100	350	700 (2:1)	$10,000
70% of donors			20% of goal

This is an idealized chart; reality is never so orderly. Use this tool to plan, guide, and evaluate your fundraising campaign.

Sample ask language

Asking a friend:

"As you you might know, Sally, I'm involved with [name of group] and one of my roles is fundraising -- so I'm contacting my friends to see if they can help. Asking for money is a little awkward, but I'm really excited about the work and I want so much for our group to succeed. If you're willing and able to make a donation, that would be great. If you have other priorities, I respect that -- you and I will be friends regardless of whether you say yes or no. But I sure hope you can help."

Asking a friend for a practice session:

"Sally, I just got back from this fundraising workshop where we learned how to ask for money face to face. It's a bit scary, but I'd really like to learn how to do it well -- so I'd like to come and practice on you. It's a real ask -- I hope you'll contribute -- but frankly, more than the money I need your feedback. I trust that you'll give me good advice. When can we sit down together?"

Framing the ask:

"As you know, I had three goals for this meeting. I wanted to give you and update on our work, and we've done that. I wanted to learn more about your interests and concerns, and I thank you for sharing that with me. And, as you know, this is a fundraising visit -- I'm here to ask for your financial support. We were hoping you would consider a gift of $____. What do you say?"

House party ask:

"Jane, that was a terrific presentation. Every time I hear about our work, I feel more enthusiastic. It's a privilege to be connected to this organization. As you can imagine, I would not have opened up my home unless I felt deeply about the value of this work -- and I do.

"As you know, this is a fundraising party, and we've set a goal tonight of $____. That sounds pretty ambitious, but I'm looking around the room and I count ____ people – which means that if each of us gives an average of $____, we can reach our goal. If that's more than you can give, please contribute what you can. If you can give more than that, terrific. The amount is up to you – my only request is that whatever you planned to give tonight, give a little more. It will make a big difference.

"I'm going to start things off with a gift of $____. Let's get out those checkbooks and pledge cards, and I hope you will all embarrass me with your generosity."

Goal: $100,000

Gifts Needed	Gifts In Hand	Gift Amount	Category Total	**TOTAL**
1	☒ *F. Smith*	$10,000	$10,000	$10,000
3	☒☒☐ *C. Goldstein; D. Lee*	$5,000	$15,000	$25,000
7	☐☐☐☐ ☐☐☐	$2,500	$17,500	$42,500
12	☒☒☒☒☒☐ ☐☐☐☐☐☐ *M. Cook; R. Rodriguez; A. Bielecki; R. Robinson; B. Fields*	$1,500	$18,000	$60,500
22	☒☒☒☒☐☐☐☐☐☐☐ ☐☐☐☐☐☐☐☐☐☐☐ *M. Fischer; R. Waterman; L. Jones; S. Nguyen*	$1,000	$22,000	$82,500
35	☒☒☒☒☒☒☒☒☒☒ ☒☒☒☒☒☒☒☒☒☒ ☒☐☐☐☐☐☐☐☐☐☐ ☐☐☐☐	$500	$17,500	**$100,000**

P. Patel; J. Hermann; M. Smith; A. Farnham; F. Murphy; K. Saenz; P. Newman; F. Gold; J. Davenport; S. Jayapal; R. Muhammed; D. Cohen; J. Miller; F. Yamamoto; C. Hickock; R. Schmook; I. Bean; K. Lieu; K. Delmarva; R. Washington; D. Best

Adapted from Toxics Action Center; names have been changed. Used with permission.

FIVE VALLEYS LAND TRUST

STEWARDSHIP CHALLENGE 2009
Goal: $250,000

Committed to date (8/25/09): $130,351
■ = committed gift

Gifts Needed	Gifts or Pledges in Hand	Gift Amount	Category Total	**CUMMULATIVE TOTAL**
5	■■□□□	$10,001 - $25,000	$75,000	$75,000
8	■□□□□ □□□	$5,001 - $10,000	$50,000	$125,000
20	■■■■■ ■■□□□ □□□□□ □□□□□	$2,501 - $5,000	$60,000	$185,000
20	■■■■■ ■□□□□ □□□□□ □□□□□	$1,001 - $2,500	$30,000	$215,000
30	■■■■■■ ■■■■■■ ■■■■■■ ■■□□□□ □□□□□□	$500 - $1,000	$20,000	$235,000
	346 gifts	$499 or less	$15,000	$250,000

Who's a prospect?

Ability: Do they have any <u>money</u> to give?

Belief: Do they <u>care</u> about your issues, programs, constituency, etc?

Contact: Do they have a <u>relationship</u> with any of your board members, staff, donors, or key volunteers? Are they already contributing money, time, or both?

If people meet these three criteria, they are PROSPECTS and should be asked to contribute (or perhaps to contribute more).

Creating a Prospect List

	Name/ Address	Relationship to me	Believes in cause	Gives money	Gift range
1					
2					
3					
4					
5					
6					
7					
8					
9					
10					
11					
12					
13					
14					
15					

What's the Most Effective Way to Reach a Donor?

____ Impersonal telephone call (telemarketing)

____ Fundraising benefit / special event

____ Face-to-face request; team of two askers

____ Impersonal form letter (direct mail)

____ Media / advertising
(for example, paid newspaper ads)

____ Personal letter on personal stationery

____ Door-to-door canvassing
(with paid canvassers)

____ Personalized form letter
(hand-signed with note)

____ Face-to-face request; one asker

____ Personal telephone call

Sample letter:
Setting up the face-to-face ask

Martina Jones
123 Main Street
Des Moines, IA 55555

Dear Martina:

It's that time of year again – we're doing our annual fundraising campaign in support of (brief description of your mission). Last year, you made a very generous donation of $500, which is a big gift for us, and we really appreciate your support. Contributions from people like you helped us to accomplish the following:

- (Big, impressive accomplishment)
- (Not so big, but still impressive)
- (Something interesting the donor is unlikely to know about)

This year, we face a number of challenges:

- (Big, scary challenge – maybe increased demand for your services?)
- (Not so big, but still impressive)
- (Perhaps something related to organizational development, rather than external factors)

To meet these challenges, we are asking our most generous supporters to consider doubling their gifts, which in your case would be a contribution of $1000. I appreciate that this is a big commitment, so before you decide, I would love the chance to meet with you, give you an update, learn more your interest in our work, and ask for your support.

I will be calling you next week to set up an appointment.

Again, thank you for your generous and loyal support. I look forward to speaking with you, and meeting with you, very soon.

Warm regards,

If you're uncomfortable naming a number, consider language like this:

We're asking for gifts of between $500 and $5000 toward a campaign goal of $50,000. To be honest, I have no idea how much to ask you for, so let's sit down together, discuss it, and you can tell me how much would be appropriate.

If you're soliciting a new prospect, the relevant paragraphs might be:

> As you might know, I'm on the board of Everybody Loves Everybody, which works to (brief description of your mission). Our organization has a long history of success, including (insert bulleted items here).
>
> One of my tasks as a board member is to identify new supporters for our work. We've set goal of $____ and we're seeking donations of between $____ and $____ to help meet that goal. I'd like to arrange an appointment so we can discuss the work and see if you'd like to contribute.

Use these letters as templates by adapting the language and tone as you see fit. In writing the letter, keep the following points in mind:

- **It's brief** – no more than one page.
- **It says "thank you."** It acknowledges past support or, in the case of new prospects, it thanks them for considering a gift.
- **It's explicitly about fundraising.** It doesn't hint or use code words – your intentions are clear from the start.
- **It includes numbers.** It mentions the amount you seek or suggests a range of gifts.
- **The purpose of this letter is not to get money, but rather to get a meeting.**

It's not necessary to craft a piece of great literature – after all, this is a one-page "I want to meet with you" letter – so don't strive for perfection. It might make sense for one person, perhaps a staff member, to prepare a standard letter that board members and other solicitors then customize. Get it done and mail it out.

Do I Hear Any Objections?
Responses to common put-offs

Sooner or later you will have this experience. After a few words of explanation – "Hi Leroy, this is Andy. I'm following up on the letter I sent about our fall fundraising campaign" – the person on the other end of the phone will say, "Sure, I'd love to get together. When's a good time for you?" Until that day, however, you must learn to respond to the most common objections.

I don't mean to imply that this is one conversation and you have to handle eight or nine put-offs in a row. However, the general rule is that you should respond to at least three before you give up.

> *Objection: "I don't have time to talk right now."*
> Response: "When would be a good time to call?"
>
> *Objection: "You sent me a letter? What letter?"* (Or alternatively, *"There's a pile of mail on the kitchen table – bills and such – and I've been avoiding it."*)
> Response: "Well, let me tell you about the letter."
>
> *Objection: "I don't really have the time to meet. Can't we just do this over the phone?"*
> Response: "That's up to you. The meeting takes about twenty minutes, and I'll make it as convenient as possible – I can come to your home or office, whatever works for you. This just works better if we meet face to face. But if you'd prefer, we can talk about it now."
>
> *Objection: "I can't afford the amount you're asking for."*
> Response: "The amount is completely up to you. Let's sit down together, discuss it, and then you'll decide."
>
> *Objection: "You know, I generally make charitable decisions with my spouse/partner/financial advisor/eight year old child/psychic friend."*
> Response: "Is it appropriate for the three of us to sit down together? If so, when would be a good time? If not, how can I help you to have that discussion – maybe the two of us could meet first?"
>
> *Objection: "You know, I support so many other groups and I'm tapped out for this year."*
> Response: "I know the feeling. Tell you what – let's take the money off the table. I'd still like to meet with you because a) I'd like to thank you for your generous support last year, and b) when you're budgeting for next year, perhaps you could remember us then. So let's assume you won't be giving now – I hear that. But I'd still like to meet. When would be a good time?"
>
> *Objection: "I gave because of your work on ____, but I don't like the position you've taken on ____."*
> Response: "You know, I'd like to hear more about your concerns. Frankly, I don't like everything the organization does, but overall I believe that the mission and the work are very important. Let's get together and talk about it; then you'll decide. If you choose not

to give, I certainly respect that. When would be a good time to meet?"

Objection: "We're down to one income and we don't have the money."
Response: "I'm sorry to hear that. Is there some other way you'd like to be involved in our work?"

Objection: "This is just not a priority right now."
Response: "Well, your past support has meant a lot to us. Shall we keep you on the mailing list? Is it appropriate to contact you again in the future?"

You're probably thinking, "What's wrong with this guy? Can't he take 'no' for an answer?" My response: "When people say no – *"We don't have the money"* or *"This is not a priority right now"* – I hear them say no. But when they say, *"That's more than I can afford,"* or *"I have to talk with my spouse first,"* that doesn't mean that they don't want to give – it means that they want to choose the amount or would prefer to consult with someone else before making a decision.

The *Three Rules of Telephone Appointment-Making:*

1. Whatever the objection, take it literally. Rather than making assumptions about what other people mean, take them at their word. The corollary is this: if they say no – a clear, explicit no – you have to honor that.

2. Assume success. Don't say, "Do you want to meet?" Ask, "*When* do you want to meet?" This is a subtle distinction, but it makes a big difference.

3. Keep bringing it back to your agenda. "When do you want to meet?"

You have to find your own comfort level. If these suggestions seem a bit too assertive for your taste, back off a little. Strive for a balance between assertiveness and humility, between boldness and fear. If you give in to the fear – if you backpedal at the first objection – you do a disservice to yourself, your group, and your donors. Be bold and watch what happens.

Major gifts visit: Structuring the conversation

1. Build rapport. Chat a little. Start with topics that have no bearing on your organization or fundraising campaign. "How's your job? What are your kids doing these days? I notice you've got your garden in; what are you growing this year?" Don't spend a lot of time on idle chatter – the meeting might get away from you – but it's good manners to ease into the topic at hand.

2. State your goals for the meeting. This step is optional but recommended. You might say, "Margarita, I've come today with three things on my mind. One, I'm here to tell you about our work. Two, I want to learn more about you and your interests. Three, it's my responsibility to ask for your financial support. To tell you the truth, I'd like to know why you're interested in our organization, so let's start there." This provides a clean segue into the next item.

3. Uncover the person's needs and interests. Find out why he or she cares about your work. For a donor, the questions might be, "You gave us $500 last year, which is a big gift for us. Why did you do it? Why do you care about this issue?" When talking with a prospect who is considering a first gift, perhaps you can ask, "What's your experience with our work? Why does it interest you?" Initiate a dialogue by asking questions. Get the prospect talking.

4. Present your organization: your goals, programs, and financial needs. Tell stories. Where relevant, cite statistics. Keep it brief; don't overwhelm the person with a blow-by-blow description of your 14-point strategic plan. If you have visuals that tell your story – maps, graphs, photos, charts, or site plans – this is an opportunity to use them. Encourage questions.

5. Ask for the gift. Be clear, explicit, and straightforward. "Sally, as I mentioned in the letter, we were hoping you'd consider a gift of $1,000 to support our work. It would mean a lot to us. What do you say?" As an alternative, "As I mentioned in the letter, we're looking for gifts of between $500 and $5,000. I appreciate that this is a wide range, and to be honest, we don't know the appropriate amount to ask of you. How much would you like to give?"

Once you've asked for the gift, wait – *keep your mouth closed.* Don't make excuses or start to backpedal before the donor has a chance to respond. Just sit quietly and wait.

6. Deal with any objections. Some of the objections you answered by phone are likely to come up again now. Think in advance about these objections and how you might respond. Practice your answers and bring notes to the meeting. For example, if the person says, "You're asking for more than I can afford," you can reply, "How much would you like to give?" In response to, "I'm unable to give right now," you could say, "Do you want to make a pledge now and pay later? If that works for you, it works for us." Most of these responses are nothing more than common sense, so:

- Take a breath,
- Ask yourself, "What's the logical response to this concern?"
- Respond accordingly.

7. Close the meeting. Restate any agreements you've made so both parties leave the room with the same expectations. Once again, be clear, explicit and straightforward.

"The Ask"
Meeting with your prospect

The purpose of this role play is to help you:

1. Develop confidence and clarity in your "pitch" -- how you present your work
2. Develop empathy for the person on the other side of the relationship -- the prospective donor
3. Improve your listening skills

Dramatis personae (Shakespearean for "the parts to be played"):

1. **The asker (or solicitor)**. A volunteer or staff member who helps with fundraising.
2. **The prospect**. A current or prospective donor who is known to the asker -- in other words, they have a direct personal relationship.
3. **The observer**: who gets to watch and comment (after the role play is over).

By the end of the exercise, everyone will have the opportunity to play all three roles.

Setting up the role play

The asker reviews the prospect list that he or she filled out earlier and chooses one person on the list. The asker then trains the prospect to "be" that person by describing the prospect's current level of knowledge and involvement with the organization.

For example, the asker might say, "I want you to be my Aunt Rita. She always talks to me about my work and seems very interested. She came to our open house event last year but has never given. I know she attends church, which makes me think she is charitable, and when I was at the theatre I saw her listed in the program as a $250 donor."

Where to meet: You decide. Your options include the prospect's home or office, your home or office, or a neutral location (such as a restaurant).

Asker

Your goal is to:
1. Introduce the work of your organization.
2. By asking questions, find out what the prospect cares about and how your work might address his or her interests.
3. Encourage the prospect to agree to a next step; this could include:
   a. Make a gift or a pledge.
   b. Suggest other prospects.
   c. Volunteer to help with program or fundraising needs.

Bonus points: show and tell (visual aids)

Prospect

Your goal is to:

1. Learn more about this group without spending a lot of time.
2. If you can, identify one aspect of the group, the project, or the presentation that grabs your attention.
3. Provide a few objections or obstacles for the solicitor to address.
4. Based on the conversation, decide if you will:
   a. Contribute or pledge today.
   b. Delay your decision ("I'd like to think about it.")
   c. Decline to donate.
   d. Become involved in some other way.

Bonus points: Unexpected distractions (phone calls, pagers, other people going in and out, etc.) are allowed.

Observer

Your goal is to:

1. Watch, listen, take notes, and be prepared to talk about what you see and hear.

Bonus points: Save your comments for the debriefing period.

Structure of the meeting (instructions for the asker)

1. Briefly build rapport with the prospect by discussing any mutual interests, friends, etc
2. Uncover the prospect's needs and interests. Why does he or she care about your issue or programs? If the prospect were to give, what would s/he want in return?
3. Make a brief presentation about your work, allowing the prospect to participate and ask questions.
4. Ask for the gift, naming a specific amount or a range. After "the ask," keep quiet and wait for the prospect to respond.
5. Deal with any concerns or objections.
6. Close the meeting by re-stating and clarifying any agreements or next steps.

To "debrief" this exercise

1. The asker goes first. S/he says *two things about the meeting that went well and one thing that could have worked better, with an idea for how to improve it.*
2. The prospect goes next, following the same format.
3. Finally, the observer offers comments, following the same format.

Timing: Each side of this triangle (role play plus debriefing) takes 15-20 minutes. Then all participants rotate to a new role. Total time: 45-60 minutes. The facilitator will keep track of the clock and announce when it's time to switch roles.

More Askers = More Money:
An All-Staff Approach to Major Gifts

BY ANDY ROBINSON

Deep in the heart of every development director you'll find an enduring fantasy: volunteer board members who ask for big gifts face to face. This vision is so pervasive and persistent that an entire industry — books, articles, workshops, consultants — has emerged to promote and service it. As a member of that industry, I can report that demand never ends and business is brisk.

This worthy fantasy can come true, but progress is usually measured in small, incremental steps. However, given all the challenges associated with board members' participation in fundraising, it surprises me how few organizations turn to the other available "human resource": their staff.

To raise money successfully, nonprofits need at least three things: a strong case for giving, prospective donors to solicit, and people to do the asking. Grassroots activists tend to assume — incorrectly — that they lack the second element — prospects for big gifts. However, most donors can and will give much more than you think. For example, people tend to contribute five to ten times more money when asked in person than they do when solicited by mail. If you can't or won't meet with your supporters, you're leaving money on the table.

Most donors can and will give much more than you think.

For most organizations, the biggest barrier isn't, in fact, a lack of donors, but rather a lack of *askers*. Perhaps it's time for a different approach to major gifts — one that deploys your human resources in a different way by focusing a little less on your board and putting a lot more energy into training and motivating your entire staff.

Consider Toxics Action Center (www.toxicsaction.org), which works in neighborhoods across New England to address the human health impacts of pollution, pesticides, workplace chemicals, and other poisons. They use a traditional community organizing model: canvassing neighborhoods by knocking on doors, sitting at kitchen tables, meeting with community groups, and organizing both formal and informal networks of residents to fight corporate and government misbehavior.

After five years of building their major gifts program, Toxics Action now raises $110,000 per year — one-quarter of its annual budget — from individual major gifts of at least $250. Using the time and talents of eight staff members, only one of whom is a full-time fundraiser, the organization conducts 250 to 300 donor visits each year in homes spread across six states.

ALL TOGETHER NOW

At Toxics Action, the first rule of fundraising is that every staff member participates. If you're on the payroll, you meet with members and ask for big gifts. Period. Everyone is trained together (regardless of previous experience), everyone works the phones together, and everyone schedules appointments during the same weeks. This egalitarian approach leaves no fundraiser (or prospective major donor) behind. Here's what makes this strategy work.

1. A campaign model with specific goals, deadlines, and a very tight calendar. Twice a year, in January and September, Toxics Action shuts down most regular activities for two weeks to concentrate on major donor fundraising. The first week of each campaign is dedicated to staff training and phoning donors to set up appointments. On the second week, everyone hits the road for donor meetings. Staff can and will do a bit of their normal work during this period, but for two weeks, fundraising is *the* priority. Conversely, organizers and support staff do very little major donor fundraising between campaigns, so when it's over, it's really over.

A third campaign is organized each May to follow up with remaining major donors and prospects, but this one is limited to a few senior staff. The rest of the staff canvasses through the summer, improving their door-knocking skills and building up the membership base.

2. Devotion to the numbers. During the campaign, all goals are stated and tracked numerically (see the campaign analysis chart on page 14). Each staff member begins with a list of between 55 and 70 members and is expected to reach half by phone during the first week, with the goal of scheduling 15 to 18 visits for the second week. These numbers are tallied and discussed at the end of each work day, so a dose of daily accountability is built in to the process.

3. A commitment to storytelling. Everyone is encouraged to tell and develop their own stories — why they're personally involved, why they do the work — and trained to elicit stories from the members. They all learn and tell organizational success stories. According to consultant Valerie Reuther, who helped Toxics Action to develop and perfect this approach, even the pitch —"why you need to give now" — is framed as a story.

4. A "culture of practice," in the words of executive director Alyssa Schuren. Training week feels a bit like boot camp: a typical 12-hour day includes repeated role plays interspersed with actual donor phone calls, sharing stories from the organizational "story bank," point-by-point training on conducting donor meetings, followed by more phone calls and role plays (see daily schedule).

Every stage in the solicitation process is discussed, modeled, and practiced. "We break it down into very small pieces," says Schuren. "We learn them one by one and then we put the pieces together."

Picture this: a series of practice stations encircling the room dedicated to the most common telephone excuses — "I don't have time to meet with you," "Just mail me something," and so on. During one training session, solicitors spend more than an hour rotating through these stations, practicing their responses until they feel prepared to address any objection they might hear on the phone. After such rigorous training, the actual phone calls are much more manageable.

5. Persistence powered by a dose of realism. During training-and-telephone week, staff members spend about 15 hours total on the phone with the goal of scheduling their 15 to 18 appointments. That's about one appointment per hour, during which they also confront a lot of voice mail, the occasional wrong number, and a taste of rejection. Everybody is given clear expectations from the start: one meeting per hour is a good result, so keep working your way through the list. If you make enough calls and talk with enough people, you'll reach your goal.

Sample daily schedule for the first week of the campaign

8:45–8:55 AM	Introductions
8:55–9:15 AM	Phone practice
9:15–10:30 AM	Phone calls
10:30–10:45 AM	Debrief
10:45–11:00 AM	Break
11:00 AM–noon	Storytelling workshop: How to collect and shape our stories
noon–1:30 PM	Donor meeting training: Putting together all the pieces for the first ask
1:00–2:00 PM	Lunch; write confirmation notes for scheduled meetings
2:00–3:00 PM	Phone calls
3:00–3:15 PM	Debrief
3:15–3:30 PM	Break
3:30–4:30 PM	Donor meeting training: The close and second ask
4:30–5:00 PM	Approaching renewals (previous donor visit) vs. upgrades (never been visited)
5:00–6:15 PM	Phone calls
6:15–7:00 PM	Dinner; write confirmation notes for scheduled meetings
7:00–7:15 PM	Phone practice
7:15–9:00 PM	Phone calls
9:00–9:15 PM	Debrief; review daily and running totals of calls made, meetings scheduled

6. A culture of mutual support. Everyone is accountable for both individual and collective goals, but the campaign leaders — Schuren and development director Mia Scampini — are encouraging and even gentle in their critiques. People laugh a lot, especially at their own behavior. While facing difficult work together, a tangible esprit de corps is modeled and reinforced by the leadership. Mutual support is built in at every stage. For example, during donor visit week, three conference calls are scheduled so everyone has the chance to share notes, commiserate, and inspire each other.

New employees are told that they will be accountable for raising money, and that they will also be trained and supported.

7. Transparency in recruitment. Before they sign on, new employees are told that they will be accountable for raising money, and that they will also be trained and supported — and everyone, regardless of job title or seniority, will be doing the same work. Once hired, nobody can credibly complain that "Fundraising isn't my job."

8. The courage to ask for much bigger gifts. Toxics Action members who have sent in $50 checks are generally asked for $1,500 during the meeting; those who have sent $100 checks are asked for $2,500. The result: during the fall 2006 campaign, the average gift was $538. These visits can lead to even larger contributions over the years, as $500 donors increase their gifts to $1,500 or more.

Each donor meeting is, in effect, an organizing meeting.

Scampini tells a typical story: "It was a working-class neighborhood. The family had previously given $45; the man was a surveyor and his spouse worked as a homemaker. Looking around their house, I had my doubts, but they had both been active in our local campaign, so I asked for $1,500. The husband said, 'We were thinking about $500, so why don't we meet in the middle and we'll give you $1,000.' I was blown away — but this happens to us all the time."

9. Embracing the wisdom that fundraising equals organizing. If you calculate staff expenses in the cost per dollar raised, the Toxics Action model starts to look less profitable. But this analysis misses the larger point: every contact with constituents is a chance to deepen commitment, strengthen relationships, and encourage members to accept responsibility for the health and growth of the organization. Each donor meeting is, in effect, an organizing meeting. Fundraising provides another opportunity to sit with members in their homes, ask about their concerns, discuss how they want to participate to address those concerns, and involve them in the work.

This method also helps the staff to become better organizers. They improve their listening skills, discover the value of persistence, and learn to speak about the organization in a compelling way. If for a similar campaign you wanted to recruit board members and other volunteer leaders to join the campaign, they would gain the same skills while expanding the pool of askers and potentially reducing your costs per donor reached and dollar raised.

TOO GOOD TO BE TRUE?

This model, which works very well for Toxics Action, also has its quirks and disadvantages.

Lots of time, no dependents. All current employees are under the age of 35; none have children or other dependents. (This hasn't always been the case — toward the end of his tenure, the former executive director was raising three kids — but the staff has always been relatively young.) Yes, they have lives outside of Toxics Action, but they also have enough flexibility to participate in a two-week fundraising blitz with several 12-hour days and lots of travel. Of course parents can travel and put in long hours — many do — but with young

Fall 2006 Campaign Analysis

In this chart showing the results of Toxics Action's fall campaign, the wide range of individual results — average gifts ranging from $85 to $1,716 — reflects a variety of factors, including the previous giving history of the donors, the difference in response rates and gift size from donors who had been visited previously compared to those being visited for the first time, and the varying levels of experience, comfort, and aptitude of the solicitors.

At Toxics Action, the usual practice is to pair the most generous donors with senior staff, who in many cases know them personally from previous campaigns. In this instance, the executive director focused on top-tier renewals, generating more than half the money raised (and skewing the averages in the process). This approach provides a kind of insurance policy for the organization — it makes sense to match your best solicitors with your best prospects — but the unintended consequence is a harder slog for everyone else. It might make sense to team up seasoned staff with less experienced askers when going out for some of the bigger gifts, for a two-on-one approach. Although it would take the less experienced staff away from some of their own visits, this approach might propel them into more success. Nonetheless, even when the two primary fundraisers (executive director and development director) are removed from the equation, the non-fundraising staff averaged $243 per visit — a very respectable result for a grassroots organization.

STAFF POSITION	PROSPECTS TO CALL	YES, WILL MEET	NO	MAYBE	MEETINGS COMPLETED	TOTAL RAISED	AVERAGE GIFT MEETING
Executive director	26	25	1	0	22	$37,755	$1,716
Development director	100	27	25	2	25	$11,430	$457
State director	57	19	17	1	16	$9,630	$602
Organizer	70	17	12	1	17	$1,451	$85
Organizer	58	15	16	2	12	$3,860	$322
Organizer	61	16	22	3	12	$1,270	$106
Organizer	57	13	26	0	13	$1,770	$136
Administrator	61	13	17	2	11	$1,735	$157
Totals	**490**	**145**	**136**	**11**	**128**	**$68,901**	**$538**

children at home, it could be challenging to honor this campaign schedule.

Staff turnover. The flip side of employing a relatively young and childless workforce is that they tend to relocate more frequently than the general population. New staff must be recruited and trained all the time, which means that donors often meet with different solicitors each year. However, the group's major donor income also rises each year, so although this situation is a challenge for the group, it does not seem to be an obstacle to the success of the campaigns.

You can reach "critical mass" for a campaign like this with as few as three or four staff solicitors.

Limited board involvement. Toxics Action has had limited success in engaging its board or other volunteers in these campaigns. Because most of their board members have jobs and family commitments, it's hard for them to join in such rigorous schedules. However, board members do provide prospect names, contribute money themselves, and occasionally participate in donor visits.

ADAPTING THIS APPROACH FOR YOUR ORGANIZATION

Although the Toxics Action model may seem daunting — very few nonprofits can shut down the office for two weeks while the entire staff raises money — perhaps you can redesign it to meet the needs and circumstance of your group. Here are a few suggestions to spark your thinking:

• ***Reduce the time commitment.*** Spend two days on training and phoning, and three days on visits, for a total of one work week instead of two. This approach might work well for local groups where most constituents live within the neighborhood, city, or county. The fundraising days don't have to be consecutive — you could do training and calling one week and schedule donor meetings for the following week, with a few days of regular work in between.

• ***Spread out the time commitment.*** For example, you might dedicate half of everyone's work hours for a month, with scheduled time for collective training, phoning, and donor visits. As a variation, you could devote four or five consecutive two-day-per-week blocks of time to this work, say every Wednesday and Thursday for a month, divided among training, calling, and donor visits. If any of your board or volunteers can make a regular time commitment, this might be a viable strategy for involving them.

• ***Recruit a smaller staff team.*** Rather than taking every staff person off their other work, you could focus on development and executive staff. According to trainer Valerie Reuther, you can reach "critical mass" for a campaign like this with as few as three or four staff solicitors.

Other lessons from the Toxics Action approach can be applied to your fundraising program even if your program doesn't involve such concentrated campaigns. Here are a few:

• ***Share the numbers.*** For those who don't do it every day — and for some who do — fundraising is mysterious. Require time at staff meetings and retreats to talk about where your money comes from. Discuss the pros and cons of various types of nonprofit income. The message: by providing more money, especially unrestricted income, a successful major gifts campaign benefits everyone, regardless of job title.

• ***Collect and share stories.*** Successful fundraising is based on compelling stories. Every organization needs a "story bank" that details the group's history and accomplishments along with the individual and collective stories of the participants. All staff members can contribute, even if they do no direct fundraising.

• ***Build a fundraising component into everyone's job description.*** Even if you can't corral your entire staff into soliciting big gifts, how can you match their talents and passions to your fundraising needs? Perhaps they could participate in a donor visit by sharing a story, and then listen and learn while someone else does "the ask."

Successful fundraising is based on compelling stories.

When fundraising is left solely to the development staff, it reinforces three all-too-pervasive myths: that fundraising requires specialized skills or a unique personality, that it's not the "real work," and that it's somehow demeaning or corrupting. Let us pledge to destroy these myths once and for all. Requiring that everyone on staff participate would be a great way to start. GFJ

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SPECIAL THANKS TO VALERIE REUTHER FOR HELP WITH THIS ARTICLE.

Finding Major Donors by Mail

By ANDY ROBINSON

Most grassroots groups tend to focus their fundraising on two inefficient and risky strategies: grant proposals and benefit events.

Grants are problematic for at least two reasons. Foundations and corporations, which distribute grants, provide only 12% of the private-sector money available to U.S. charities, so groups that rely on grant funding are chasing a small piece of a very large pie. Furthermore, fewer than 15% of all proposals submitted are actually funded, which makes for lousy odds.

Benefit events, on the other hand, are great for identifying new donors and increasing the visibility of your group, but as a pure fundraising strategy they're terribly inefficient. Consider the "work-to-profit" ratio: If you applied the same number of staff and volunteer hours and the same expense budget to other strategies, could you raise more money hour-for-hour and dollar-for-dollar? In most cases, the answer is a resounding yes.

So where should you put most of your fundraising effort? Find and cultivate individual donors, especially potential major donors. In a typical annual campaign — seeking unrestricted individual gifts that all groups need to survive and prosper — just 10% of the donors provide a whopping 60% of the money. If you identify the right people and approach them in the right ways, you can build an effective major donor program to cover a big piece of your budget.

PUTTING THEORY INTO PRACTICE

To understand how this works, consider The Wildlands Project of Tucson, Arizona, a nonprofit conservation group working to establish a network of linked wilderness reserves across North America.

When I began working with Wildlands in January 1996, the organization had an annual budget of $300,000, most of which came from three foundations. Board and staff were understandably nervous about relying on such a narrow funding base, and sought help both to diversify foundation support and to build a major donor program that would increase their small donor pool.

In designing a fundraising strategy to reach individual donors, we were restricted by two factors:

• ***The Wildlands Project is not a membership group and, for two reasons, did not want to become one.*** First, it is not equipped to manage and service a large membership base of $25 donors. And, perhaps more important, because one of the organization's primary goals is to improve cooperation among national conservation groups, the board chose to avoid mass mailings and the perception of competing with other groups for their members.

• ***The project could not solicit many major gifts in personal meetings.*** The Wildlands Project works throughout North America and has an international board that meets just twice each year. Given the vast geographic distance between staff, board, and prospective donors, and the relatively low buy-in they had decided on for the major donor program ($100 and up), it would have been too costly and logistically difficult to solicit many prospects in person.

As a result of these considerations, we decided to build the campaign around small, personalized mailings. Our goal: 200 individuals donating between $100 and $5,000 each, for a total of at least $50,000 in 1996.

WORKING THE "HOUSE LIST"

For starters, we reviewed the group's donor list and found 265 people who had given $50 or more during the previous two years. This was the first, and best, pool of prospects for major gifts.

To solicit them, we mail-merged their names into an appeal letter using the office laser printer. The mail merge allowed us to personalize each letter with name, address, and salutation: "Dear Fran" instead of "Dear Friend." The letter also requested substantial gifts: "Whether you can contribute $100, $1,000, or more, we need your help."

The letter was a page and a half long — front and back on board letterhead — and included signature spaces for both the chairman and the board president. (One is a prominent biologist, the other a nationally known conservation activist.) Both men signed all letters by hand in colored ink.

So far, so good — personal letters signed by real human beings. We took this stack to the next board meeting and read off the names with the request, "If you know any of these people, raise your hand and add a note." The blank half-page on the back would accommodate their personal greetings.

At least 100 of these letters ended up with personal notes. A few contained five or six notes, which makes for a compelling request (talk about peer pressure!). Board and staff enjoyed this exercise and were eager to learn which of their contacts contributed.

As a final touch, we hand-addressed the envelopes and applied a first-class stamp. Hand-addressing is the most effective way to ensure that the envelope is opened; a "live" stamp also helps. We included a response envelope and a remittance card, with check-offs beginning at $100 and going up to $2,500, to indicate that we were serious about receiving a substantial gift.

This appeal generated an impressive 33% return and nearly $30,000, including one gift of $10,000 and another of $5,000. After subtracting these two big contributions, the average donation (including 34 gifts of less than $100) was $164. This one mailing produced more money from individuals than everything Wildlands had tried during the previous two years. This group of donors was solicited again in December, seven months after the first letter, and the checks continued to come through March, generating more than $20,000 in additional gifts.

BRING US YOUR NAMES

Once the first mailing was completed, we asked board members to go through their personal address books, Rolodexes, and databases to identify prospective donors. Their instructions: Put aside any concerns about whether these prospects can afford to give $100, and focus on their relationship to you and their concern about the environment.

We also contacted several national conservation groups (The Nature Conservancy, National Audubon Society, The Wilderness Society, etc.) to request copies of their annual reports. These booklets contain pages and pages of major donors, sorted by the size of their gifts. After photocopying these donor lists — 62 pages of names — we distributed packets to all board and staff and asked them to check off anyone they knew.

We reasoned that these people would make excellent prospects because they had a relationship to the solicitor, they had proven their concern about conservation issues, and they had proven their ability to make a big gift. The process of reviewing these lists "triggered" other names, which increased our pool of prospects.

Needless to say, list screening is miserable work: boring, time-consuming, and seemingly pointless. One board member was embarrassed to review more than 5,000 names and find only five people he knew — but one of those five came through with $1,000. Now he doesn't need to be convinced.

In the many cases where board and staff knew prospects but did not have an address or phone number, we used a CD-ROM product available at the public library. PhoneDisc, an electronic compilation of most phone books in the country, provided good addresses for at least two-thirds of our "missing persons." As an alternative, try one of the many online databases. Our local library's Web site — *www.lib.ci.tucson.az.us* — links to several directories, including AnyWho, Switchboard, The Ultimates, WhoWhere?, and Yahoo. Click on "Web links," then "directories."

After gathering names and addresses, we again mail-merged them into an appeal letter signed by the person who knew them best. After the signer added a personal note, other board and staff were asked to add notes where appropriate. As before, we hand-addressed the envelopes, affixed a first-class stamp (from the Endangered Species commemorative series!), and included a response card and remittance envelope. For these new prospects, we also enclosed a brochure about The Wildlands Project.

Through this process, board and staff identified and solicited more than 400 additional prospects; most received two letters six months apart. The result: Forty donors provided $11,650 in large gifts, with two dozen sending smaller donations.

All told, we contacted 700 major donor prospects; 177 responded with nearly $65,000 in contributions of $100 or more. About one-third of these gifts were received from board members and at benefit events, and a few others were unsolicited, but the rest were raised through the mail.

WHAT WE LEARNED

1. Personal attention makes a big difference. The old cliché is true: People give money to people, not organizations. The more personal the contact, the more effective our fundraising. Next year, we plan to approach selected donors and prospects by phone and, when feasible, in person.

2. You don't need rich people. Most of our contributors are college faculty, nonprofit staff, doctors, activists, teachers, homemakers, retired people, etc. We have very few "name" donors.

3.Small is beautiful. Big national groups will not give this much attention to $100 or $500 donors, but grassroots groups can and should. This is the strategic advantage of being small.

4. Don't try for more major donors than you can service. Our goal was to enlist 200 major donors in 1996. Given our limited staffing, we figured this was the largest number we could maintain strong relationships with. We continue to send them personal notes and treat them as part of the family.

5. You can't save time. Every stage of this process—screening lists, mail-merging and hand-signing the letter, writing notes, hand-addressing envelopes, etc. — is time consuming. If you want to build a successful major donor program, you can't take shortcuts.

6. It works. This successful major donor strategy tripled income from major donors of The Wildlands Project within one year. Try these techniques with your own organization and watch what happens.

The Wildlands Project

PROPOSED GIFT-RANGE CHART FOR $50,000 MAJOR DONOR CAMPAIGN

RANGE OF GIFTS	NUMBER OF GIFTS DESIRED	NUMBER OF PROSPECTS (RATIO) NEEDED	TOTAL DOLLAR AMOUNT PER RANGE EXPECTED
$5,000 +	1	10 (10:1)	$5,000
$2,500–$4,999	3	15 (5:1)	$7,500
$1,000–$2,499	10	40 (4:1)	$10,000
$ 500–$999	15	45 (3:1)	$7,500
$ 250–$499	30	90 (3:1)	$7,500
$ 100–$249	125	250 (2:1)	$12,500
TOTALS:	184 donors	450 prospects	$50,000

RESULTS FROM MAJOR GIFT CAMPAIGN

GIFT AMOUNTS	NUMBER OF GIFTS	TOTAL DOLLAR AMOUNT RECEIVED
$10,000	1	$10,000
$5,000	2	$10,000
$1,500	2	$3,000
$1,243	1	$1,243
$1,000	10	$10,000
$600	1	$600
$500	17	$8,500
$400	4	$1,600
$350	1	$350
$300	5	$1,500
$250	18	$4,500
$225	1	$225
$200	18	$3,600
$150	4	$600
$125	2	$250
$100	90	$9,000
TOTALS:	177 donors	$64,968

1997

House party overview

Defined

- Intimate; 15-50 people
- In a private home
- Brief; 2 hours maximum. Includes a 10-15 minute presentation and (perhaps) an ask; see below
- Quick to organize; 4-6 weeks to plan and do
- Volunteer-driven

Decision points

1. Host or host committee
2. Venue (whose home?)
3. Fundraising goal; typically $2,500 - $10,000
4. "Hook" – What will attract the participants? A celebrity? Menu? Venue? A request from a friend?
5. Invitation list
   - 25-40% of invitees will attend *if you phone them* after sending the invitation
   - 50/50 model: Half the list from host, half from the organization
6. How to ask for the gift
   - Fixed price in advance
   - Ask at the event (most efficient for time spent)
   - Treat it as a "friend-raiser" and follow up individually with those who attend
7. Who asks?
   - The host
   - Someone introduced by the host

1. KEY ELEMENTS OF A SUCCESSFUL HOUSE PARTY

1. An Enthusiastic Host/Hostess Who has Made a Significant Gift

- ✓ Willing to host the event in their own home (not a restaurant or theater or third party location);
- ✓ Willing to provide a mailing list of friends and acquaintances;
- ✓ Willing to make follow-up phonecalls to get people to the party;
- ✓ Willing to make a direct ask for gifts or alternatively, willing to make a strong statement of support for your group's work;
- ✓ Willing to write thank you notes;
- ✓ Not essential but it's nice if the host is willing to cover the costs of food and beverage.

Where might you find some of your best host prospects?

Also, consider having folks co-host events—this divides the work between two or more people and makes it more doable.

2. Give Yourself Plenty of Time

A successful house party requires planning, scripting, phonecalls and logistical arrangements. Give yourself at least 6 to 8 weeks to put together the necessary materials and identify your host. Also put together a timeline of when things need to get done.

3. Set Specific Goals

Set two goals for your house party in concert with your host/hostess: (a) dollars to be raised; (b) # of people to attend; (c) # of invites to be mailed; (d) # of additional hosts to be identified.

4. The Event Should Last Roughly 2 Hours

A good time to host events is right after the work day from 5:30 to 7:30 p.m. before people have had a chance to go home. The formal presentation itself should last no more than 40 minutes. Get the formal part of the evening underway about 30 to 45 minutes after the start time.

5. Be Sure to Invite 3 to 4 Times as Many People as You Want to Attend

The rule of thumb is that if you want 20 people at your event you need to invite somewhere between 60 and 80 people.

6. **Make it Clear on your Invitation that the Event is a Fundraiser**

Include language on your invitation like "Donations gratefully accepted" or "Please bring your checkbooks" so that no one is surprised or offended by an "ask".

7. **Make Follow-Up Phonecalls**

This is crucial. Many house parties have failed because invitees were not contacted by phone and asked to attend the party. It's much harder to turn down an invitation from a friend on the phone than it is to simply send in a "No" RSVP. Make your calls a week after you've sent the invitations—approximately two weeks before the party. As with major donors you want to reach the person directly on the phone so it may take 2 or 3 tries before you do so. If you need to, write out a script for these phonecalls or list reasons why it's important that the person attend the party – yes, you'll need to do a little convincing here!

8. **Identify the Person Who Is Best Qualified to Make the Ask**

Generally speaking your host or hostess is the best person to make the ask because it is their friends and acquaintances who have come to the party. What you need to keep in mind is that it should be a peer who is making the "ask". If the host isn't willing to do so, then a Board member from your organization is a good candidate. Ideally, the "asker" should be someone who can speak passionately about your organization's work and someone who has already made a significant investment in your group. If you need to, script out the "ask" and help coach the "asker".

9. **Make a Direct and Compelling Ask**

Mention amounts and tell people what their gift will enable your organization to do. Avoid words like "support" and "help". Be specific and direct and make eye contact with your audience as you speak. Be sure to let people know that you can accept different kinds of gifts.

10. **Give People Time to Contemplate Their Gift**

Immediately after the "ask", give people 3 to 5 minutes to contemplate their gift and deposit envelopes in baskets around the room. One thing that can help spur people to give, is to arrange before the party for one person to stand up and publicly commit to making a donation that night. This donor might say something like: "When I came here tonight I was prepared to give $100, but now that I've heard Michael and understand how important this project is, I'm going to write a check for $250 and I urge all of you to do the same or more."

11. **Thank People as They Leave**

Have someone stationed at the door to thank guests for coming to your party. Someone who didn't make a gift that night may turn out to be an individual who wants to make a stock donation the following week.

12. **Write Thank You Notes**

Write thank you notes for gifts the next day. Where necessary, make follow-up phonecalls to individuals who needed more time to contemplate their gift or who wanted questions answered.

Other Little Pointers From My Own Experience

1. Make sure to collect names at the door. Ask people to sign in. This will enable you to do follow-up after the event.

2. Don't put a gift basket by the front door. Certainly, this may encourage someone to make a gift but it won't be a stretch gift nor will it be one that's informed by your organization's compelling presentation.

3. Make it fun for people. Provide lots of good finger foods. Unless you are MADD or AA or the host is sensitive about serving alcohol, make it available to guests. Include some entertainment if you can (music). Remember that there has to be some incentive for invitees to come to the party.

4. Offer challenges where possible. Perhaps you can offer a Board challenge or a Host challenge. Create a thermometer like the United Way and continue to update it as the evening progresses—towards your fundraising goal. This also gives you an opportunity to convince people to make a gift—ie., "we've only got $250 more to raise before we reach our goal tonight".

5. Depending on the size of the crowd have a minimum of 2 and perhaps as many as 4 or 5 people representing your organization at the event. Make sure to identify yourselves by wearing specially marked nametags.

6. Have information available about how to make gifts of stock or pledges over time.

NIGHT OF THE PARTY OUTLINE

1. **HOST WELCOMES GUESTS AND INTRODUCES AND CREDENTIALS SPEAKERS:** Audience must know speaker's connection with the campaign, job title and responsibilities so that they are perceived as a credible and authoritative voice for the campaign.

2. **SPEAKER THANKS HOST** for having the party and thanks everyone for coming.

3. **CIRCULATE SIGN IN SHEET** (so we know names and addresses of those who attended the party) and mention that campaign materials are available for folks to take with them.

4. **PURPOSE OF THE HOUSE PARTY AND AGENDA**: Tonight I will tell you about our goals, conduct a slideshow presentation of the lands we want to protect, give you a chance to ask questions, and ask for your help.

5. **CONDUCT FORMAL PRESENTATION** which should last no longer than 30 minutes.

6. **QUESTION AND ANSWER PERIOD** (5 to 10 minutes).

7. **THE CHALLENGE (this is a sample from NWEA's Loomis Forest Fund Campaign)**:

   (a) As you can see, we have an ambitious goal in front of us, with precious forests on the chopping block this year that we must protect now.
   (b) To be successful, we will need your help in three ways:
   - Give generously to this campaign;
   - Host a house party so we can continue to expand our effort;
   - Write a letter to one of our key congressional allies in support of the Partnership campaign.

   (c) Tonight, our goal is to raise enough money to protect 5 (or whatever you think appropriate given the audience and size of the party) acre—that's $2000.

   (d) Moreover, we have a great opportunity to double your investment with a challenge grant from the Paul Allen Forest Protection Foundation. This means your dollars will go twice the distance tonight.

   (e) In order to meet tonight's goal, we need all of you to stretch beyond what you thought you'd contribute. Just a reminder: we need to raise $25 million in private money to save these lands. 10% of that is going to come from grassroots gifts—including parties like these. That's $2.5 million. That's a lot of money and to get there, we need you consider making these largest conservation gift you've ever made.

If you are able to make a gift of 2 or 3 acres—a gift of $800 to $1200—then please do so now.
If you can protect 1 acre at $400, that would be extraordinary.
If a $100 gift is what you had in mind, please write a check to protect half an acre at $200.
If you came here tonight thinking you'd give $50, please consider giving $100.

8. **HOST SUPPORTS THIS PITCH WITH A PERSONAL TESTIMONIAL, ANNOUNCEMENT OF HIS/HER CONTRIBUTION AND A STATEMENT ENCOURAGING HIS/HER FRIENDS TO HELP REACH THE STATED GOAL**. (1 to 2 minutes).

Now I'm going to give you a couple of minutes right now to contemplate your gift. I want you to know that you have some giving options to consider:

(i) You can write a check tonight;
(ii) You can give via credit card – VISA or MASTERCARD;
(iii) You can make a pledge over two years;
(iv) You can make a gift of appreciated stock.

I'm also going to distribute pledge forms along with pens and envelopes. Please deposit your gift in the baskets (point to where they are). I'd ask you to remain seated for just a few more minutes so I can tell you about two additional ways that you can help us. Then the formal part of this evening's program will end although I'll certainly be available to answer any questions that you might have.

9. **NOW STOP TALKING: It's important to give people time to consider the amount of their gift** (3 to 5 minutes). **THEN THANK PEOPLE FOR THEIR CONTRIBUTIONS – LET THEM KNOW HOW MUCH YOU APPRECIATE THEIR GIFT.**

10. **THE CLOSE**: You've been a wonderful group of people to meet with and I want to thank our host for getting us all together. We've accomplished a lot here tonight thanks to your generous support. Again, thank you for coming. Now, please, enjoy the fine food, beverages and company. **HOST CAN SAY SOMETHING HERE IF HE OR SHE LIKES**.

SAMPLE SCRIPT FOR HOUSE PARTY ASK

Thank you Michael for that thoughtful and compelling presentation. As you can all see, Solar Electric Light Fund has a number of ambitious goals for 2004—fostering scientific research and protecting endangered species in Brazil; improving health care clinics in the Solomon Islands of the South Pacific; providing individual solar home systems for a remote village in war-torn Sri Lanka and more. To be successful the Solar Electric Light Fund needs you to give generously to these campaigns. Tonight, our goal is to raise $2,500--enough money, for instance, to properly light health clinics in the Solomon Islands for three months. Moreover, you have a great opportunity to double your investment because I've decided to make a challenge gift of $2,500. This means your dollars will go twice the distance tonight.

In order to meet tonight's goal, I need all of you to stretch beyond what you thought you'd contribute. If you came here tonight thinking that you would make a gift of $50, I'd like you to consider doubling your investment with a $100 donation. If $100 is what you had in mind, please consider stretching your gift to $250. If you are in a position to make a gift of $250 or more, please do so. All gifts this evening will be enormously appreciated. Please note that the Solar Electric Light Fund accepts both cash and credit card gifts. You can also pledge your gift over time or make a gift of appreciated stock. Please speak to either Michael or myself directly if you wish to take advantage of these latter two options.

I want us all to take a few minutes right now to contemplate our gifts. The baskets that are presently circulating contain both envelopes for you to enclose your gift and gift response forms. I'd ask that you remain seated for just a few more minutes so that I can tell you about two additional ways that you can help us.

Additional Ways to Help

Very quickly, there are two additional ways that you can help. If you know others who would be interested in supporting SELF's work, please provide us with those names by filling out the Friends and Family forms available on the table by the front door. Also, if you'd be willing to host a house party just like this one—and believe me it wasn't that hard—please speak to Michael. SELF is always looking for host recruits.

Fundraising: Who Does What?

Development Director	Executive Director	Board Members	Volunteers
1. Draft fundraising goal, budget, plan	Review and revise goal, budget, plan	Review, revise and approve goal, budget, plan	-----
2. Create and manage fundraising calendar	Understand fundraising calendar	Understand fundraising calendar	-----
3. Donate money	Donate money	Donate money	Donate money
4. I.D. prospects; coordinate and compile prospect research	I.D. prospects	I.D. prospects	I.D. prospects
5. Prepare fundraising letters	Approve and sign letters	Sign letters	Sign letters
6. Coordinate solicitors; solicit prospects	Solicit prospects	Solicit prospects	Solicit prospects
7. Thank donors; coordinate thank yous	Thank donors	Thank donors	Thank donors
8. Oversee donor database	Know how to use database	-----	-----
9. Coordinate fundraising events	Participate in fundraising events	Organize fundraising events	Organize fundraising events
10. Manage fundraising expenses	Oversee fundraising expenses	-----	-----
11. Conduct proposal research; manage funder relations; write proposals	Participate in funder relations; oversee proposals	Participate in funder relations; approve grant-funded projects	-----

prepared by Andy Robinson for the TREC Project, 1/99

Sample board job description

Adapted from *Great Boards for Small Groups*
by Andy Robinson, Emerson and Church, 2006

What board members provide	What board members can expect in return
1. I will give my best effort to "hit the ground running" when beginning my service with the board.	1. The organization will provide me with a full orientation, including background information on work accomplished to date.
2. I will learn about the organization's mission and programs, and be able to describe them accurately.	2. The organization will provide me with relevant materials and education.
3. I understand that the board meets ___ times per year, plus one annual full-day retreat. I will do my best to attend each meeting, with the understanding that three consecutive unexcused absences will be considered resignation from the board.	3. I expect that board meetings will be well run and productive, with a focus on decision-making and not merely reporting. I understand that agendas will be distributed at least one week in advance. If I wish to add items to the agenda, I will contact the chair at least two weeks in advance.
4. I accept fiduciary responsibility for the organization and will oversee its financial health and integrity.	4. I expect timely, accurate, and complete financial statements to be distributed at least quarterly, one week in advance of the relevant board meeting. I also expect to be trained to read and interpret these financial statements.
5. I will provide oversight to ensure that our programs run effectively.	5. I expect monthly reports from the executive director, program updates, press clippings, etc.
6. I accept ethical responsibility and will help to hold fellow board members and the executive director (and, by extension, the full staff) to professional standards.	6. The organization will provide me with relevant training.
7. I will serve as an ambassador to the community to educate others and promote our work.	7. I will need materials and may need training (public speaking, etc.) to do this job effectively.
8. I commit to increasing my skills as a board member.	8. The organization will provide me with appropriate training and support.
9. I will participate in fundraising to ensure that our organization has the resources it needs to meet its mission. I commit to making a personal donation; our organization will be one of the top three charities I support each year that I am on the board.	9. I will be able to choose from a range of fundraising activities, and I expect relevant training and support to help me fulfill my obligations. I will have the option of fulfilling my personal pledge in monthly or quarterly installments, if I so choose.
10. I will evaluate the performance of the executive director.	10. This evaluation will be based on goals developed jointly by the board and the E.D.

______________________________________ ______________________________________

Board member signature **Date** **Board chair signature** **Date**

OHIO ENVIRONMENTAL COUNCIL

KEEP WATCH, TAKE ACTION, MAKE CHANGE

Board of Directors

"2006 Menu of Opportunities"

This is an "all-you-can-eat" menu!
Please circle as many items as you like—but at least one per category.
NAME: ____________________

Appetizers

Provide names of donor prospects
Attend and mingle with donors on a "Real Ohio" Tour
Invite donors to attend "Real Ohio" Tours
Sign & personalize letters to current and prospective donors
Attend and mingle with donors at a House Party
Help to develop a plan to solicit major gifts
Advocate for OEC and serve as an enthusiastic community relations representative (be an ambassador)
Write a newsletter article for the *Watch!*

Entrées

Make a significant gift
Include the OEC in your estate plan
Host a House Party
Accompany staff on visit to major donor
Make thank you calls to donors
Recruit Annual Reception sponsors
Recruit new board members with capacity and connections

Desserts

Help gain access to workplaces for Earth Share
Promote and attend OEC Lobby Day
Collect other organizations' annual reports, donor lists & programs
Promote and attend OEC Annual Reception and mingle with donors
Acquire or donate silent auction item donations for Annual Reception
Forward emails and newsclips featuring OEC to current and prospective donors

Grassroots INTERNATIONAL

2006-2007 Development "Menu of Opportunities"

NAME: ____

We All Set the Table Together

I will contribute ____ names and addresses from my Rolodex (snail mail and e-mail) for these folks to receive a solicitation and newsletter

I will make 25 calls as part of a giving-season major donor campaign

I will make a significant gift

This is "all-you-can-eat", so please circle as many items as you like—at least one per category.

Appetizers

Bring Grassroots' educational and promotional materials to the conferences I attend. Distribute them, collect business cards or names on a sign up sheet and deliver them to Grassroots

Speak on Grassroots' behalf in a community or business forum

Write for Grassroots' electronic newsletter

Entrées

Host a House Party or work with a friend, neighbor or colleague to host one

Forward Grassroots' e-appeals to my e-lists

Recruit new board members with fundraising capacity and connections

Desserts

Make thank you calls to donors

Visit ____ major donors in my city and during my travels

Secure speaking engagement for Grassroots at a strategic venue

Action Planning Form

Desired change number 1:

Benchmarks (how will you measure this change?)

Allies (who will you get to help?)

Action steps:
Over the *next week*, I/we will:

Over the *next month*, I/we will:

Over the *next three months*, I/we will:

Desired change number 2:

Benchmarks (how will you measure this change?)

Allies (who will you get to help?)

Action steps:
Over the *next week*, I/we will:

Over the *next month*, I/we will:

Over the *next three months*, I/we will:

Desired change number 3:

Benchmarks (how will you measure this change?)

Allies (who will you get to help?)

Action steps:
Over the *next week*, I/we will:

Over the *next month*, I/we will:

Over the *next three months*, I/we will:
