

FUNDRAISING SPECIALIZED TERMS AND UNIQUE PHRASES

This section brings together many concepts and principles that have already been discussed other places in this book. The authors believe that understanding the terms and unique phrases and fully utilizing the tips provided with the overview of each unique phrase or fundraising term will be helpful both to seasoned fundraisers for charitable, non-profit, and faith-based organizations and to those who are just starting the adventure we call Raising Money for Mighty Missions.

80–20 Rule. Statistically, in most successful fundraising efforts, 80% of the total dollars raised are given by 20% of the individuals or organizations contacted. Understanding this rule has led some organizations to spend the majority of their fundraising efforts on individuals and organizations with the greatest capacity to give. However, it is important to understand that some large gifts are made by individuals who may not appear to have the capacity to make significant gifts. Legally and in many other ways, non-profit organizations are responsible to the public at large. It is important to make sure that the general public and individuals at all economic levels understand the mission of the non-profit organization and have an opportunity to participate in fundraising and in supporting the organization in other ways.

Annual Fund. Many organizations have an ongoing process of fundraising. Most often, donations are tabulated on an annual basis and do not include grants, capital, or other special campaigns. The annual fund also does not include donations to the organization's endowment fund or wills and bequests. Successful non-profit organizations have a well-designed plan for annual fundraising. Specific and measurable goals and strategies to attain those goals are in place and monitored. Goals might be to increase the number of donations over a specific amount, the average size of annual donations, the number of donors, or the number of new donors, or to minimize the number of individuals who no longer donate. It is fully expected that 100% of all board members and all of the organization's senior leadership will make a significant stretch gift annually and, as appropriate, annually obtain significant gifts from their business or their employer.

Biblical Stewardship Principles. The Lutheran Church—Missouri Synod (1995) identified eight Biblical principles which it believes should be applied to congregational and other fundraising. Perhaps all non-profit organizations and their fundraising personnel would be wise to consider how these principles should or should not be applied to their fundraising efforts. These principles are:

1. God's stewards are God's stewards.
2. God's stewards are managers, not owners.
3. God's stewards are saints and sinners.
4. God's stewards are uniquely singular, yet profoundly plural.
5. God's stewards are in the world, but not of the world.
6. God's stewards are loved and loving.
7. God's stewards are served and serving.
8. God's stewards live with an awareness of the present and the future of time and eternity.

Campaign Chair. The campaign chair (and, if needed, co-chair) will become the public face of your campaign. The chair will be asked to speak publicly a few times on behalf of your organization and its campaign. The chair will be asked to attract others to the campaign. By giving your organization their name, their face, and their time, campaign chairs have also given your organization a significantly increased status and level of acceptance. The campaign chair (or co-chair) must work closely with the non-profit organization's leadership (paid or volunteer) to coordinate efforts and activities. Sometimes an individual with a very high position in the community or the business world will be willing to be named Honorary Campaign Chair.

Campaign Committee. Once a non-profit organization determines that it will conduct a fundraising campaign (not just maintain its annual fundraising efforts), it will need to form a campaign committee to design and implement a plan to meet the fundraising goals agreed to by the Board of Directors. Members of the campaign committee will initially be individuals who are already involved in the organization and who are able to recruit people with significant power and influence. After energizing its members, the campaign committee will develop tasks to be completed, strategies to be used, and ways to tell the story of the organization and the needs the campaign will meet. Members of the campaign committee will be expected to give presentations about the organization and to make solicitation calls. Each member of the campaign committee will be expected to make a personal stretch gift.

Case for Support. The Case for Support is an essential element of any significant fundraising effort. It will be utilized by individual after individual as they ask for money for your non-profit organization. It must state clearly, in a compelling way, why your organization needs and can probably obtain philanthropic support. The Case for Support should be based on historical data and on information gathered from sometimes heart-wrenching input forums. The Case for Support should also be based on clear, measurable, and prioritized goals as well as on specific strategies to reach those goals that the board and staff have developed into a multi-year strategic plan. If the strategic planning process has been done well, the key elements of the Case for Support will emerge almost automatically. The paid and volunteer leadership of the non-profit organization will have come to a consensus as to why their non-profit organization needs and can likely obtain its fundraising goals. This process of formulating a Case for Support positions the non-profit organization to begin raising money for Mighty Missions.

CFRE (Certified Fundraising Executive). It is a special designation bestowed by CFRE International on individuals after it conducts a careful review of each candidate's fundraising training, experience, success, and scores on a comprehensive examination. CRFE International certifies only individual fundraising professionals who demonstrate the knowledge, skills and commitment to the highest standards of ethical and professional practice in serving the philanthropic sector.

Changing the World. As your non-profit organization raises money for our Mighty Missions, you are changing the world one step at a time. If the funds you raise are utilized to address urgent and compelling needs, you are blessed to see the impact first-hand. Ensuring that your non-profit organization is able to fulfill its mission is your own little way of changing the world. One strong example is what is being done every day with the funds raised by Progress Industries. Its mission is Changing the World for Individuals with Disabilities by Providing Opportunities and Skills to Meet Needs and Pursue Dreams. To focus its efforts and the allocation of its people and fiscal resources, this fine organization carefully monitors whether the world of each person it serves is actually being

changed in positive ways. We as fundraisers should hold ourselves accountable and regularly ask ourselves whether we are having an impact. We should continually ask ourselves if we are changing the world.

Compelling Case for Support. The Case for Support must be stated in a way that calls others to action. If those who learn of the needs for which the non-profit organization is raising money feel connected with the needs and are touched emotionally, they will feel compelled to support the fundraising efforts. When the well-written Case for Support is based on historical data; input forums; clear, measurable, prioritized goals; and well-developed strategies to obtain those goals, potential donors will compel themselves to do what they can to help. A weak Case for Support confuses volunteer fundraisers and leaves them powerless to answer the questions of potential donors. More importantly, it leaves the volunteers themselves lukewarm about the real needs for fundraising success and for contributing their own time, talents, and personal financial resources.

Confidentiality. All information about individual donors is private and should be appropriately safeguarded. All details about donations from anonymous donors must remain anonymous. Many organizations will regularly list business or individual gifts by the category and size of the gift(s); however, it is a good policy to ensure that donors are aware of this practice before their names are listed. To protect themselves and their donors, organizations should maintain only necessary factual information. It is important to maintain confidentiality as much as possible when dealing with state sunshine laws. It is also important to understand that individual donor records may be subject to legal review or subpoenas.

Deep Personal Passion. It is very hard for individuals to work for an organization about which they are only lukewarm. It is critical that those who strive to raise funds for an organization develop, demonstrate, and communicate a deep personal passion for the organization and for its mission. Potential donors are very perceptive; if those asking for donations have no passion for the organization, it is highly unlikely that prospects will make anything other than a token donation. To enhance their knowledge of the organization and to help them develop a deep personal passion, it may be necessary for fundraising personnel to spend some time immersed in providing the organization's direct service.

Donor Database. Maintaining meaningful and ongoing contacts with donors is extremely important. While donor information can be maintained on 3" x 5" cards, many successful non-profit organizations use a commercially available donor database. Donor information should include the amount, the date, and the appeal to the individual has donated. Contact information, including dates of visits and what was discussed, can be very helpful in strengthening and maintaining a positive relationship with donors. Donor information can also be utilized to assist fundraising staff in recognizing cumulative giving and each donor's personal milestones (birthdays, anniversaries, retirements, etc.). To protect themselves and their donors, the organization's donor database should maintain only factual information and only the information that is necessary. In some situations the information in a donor database may be subject to disclosure under state sunshine laws and could be subject to legal review or subpoenas.

Donor Prospects. Almost everyone who knows about your organization is a donor prospect. Successful non-profit organizations are always on the lookout for individuals who believe in their organization and might be able to help it fulfill its mission. Once these individuals are identified, a strategy should be implemented to develop a positive relationship between them and the non-profit organization. Only after this relationship has been developed can they be considered a realistic

prospect for a substantial gift or in-kind donation. When the organization has implemented fundraising campaigns, these individuals may be prospective donors for larger or multi-year gifts. In addition, all current donors are prospects for future gifts and may be successfully approached to increase the size of their donations.

Easy to Give. The more difficult it is to give to your non-profit organization, the lower the number and amount of gifts that will be received. Some donors make monthly contributions by automatic bank drafts while others appreciate quarterly reminders of pledges they have made. For years, successful non-profit organizations have extensively utilized postage-paid reply envelopes. These envelopes are discreetly visible at all organizational events and are inserted into the organization's brochures and newsletters. It is extremely rare that one of these envelopes will be mailed to the organization with a donation less than the actual cost of the envelope and the postage. While it is not practical for all organizations, ideally donors should be able to make contributions online. Don't overlook recent research from TargetAnalytics that indicates that the Internet is becoming "an important source for new donor acquisition."

Emergent Case for Support. Somehow the key elements of the Case for Support seem to emerge almost automatically from a well-organized strategic planning process. When a non-profit organization utilizes its own hard data and information gathered from sometimes heart-wrenching input forums much is accomplished. When clear, measurable, and prioritized goals and specific strategies to meet them have been formulated by the board and staff into a multi-year strategic plan, urgent and compelling needs are easily recognized. These needs become the key elements of a Case for Support.

Forever Changed. Funds raised for worthwhile organizations can help them fulfill their mission today and lay the foundation to meet needs for decades to come. Professional fundraisers and even volunteer fundraisers develop new confidence, poise and professional skills. Individuals who become successful fundraisers will be forever changed while giving of themselves to the organizations they love. For these special individuals, fundraising becomes a calling. One success and one turndown at a time, they develop "thick skin, a soft heart, exceptional hearing, a quick mind, a slow tongue, and no shame."

Friend-Raisers. Sometimes the primary purpose of a special event is not to raise funds, but to raise public awareness and win friends. These events can be a very powerful way to let others see the impact of an organization's Mighty Mission. When others see, when they feel first-hand what such an organization does, they are often deeply touched and moved to give of their time and talents. They become future donor prospects. Some non-profit organizations hold an annual open house; some have a back yard barbecue; some simply put up interactive booths at health fairs or even at Chamber of Commerce business-to-business events. One children's museum regularly holds an overnight lock-in and lets its patrons experience the exhibits hands-on and up close and personal. Careful planning is critical for these friend-raisers. They have to be safe, they have to be fun, and there must be a follow-up plan to encourage some of these newfound friends to become volunteers and future donors or even sponsors of future special-event fundraisers.

Fund Development Needs Assessment. Regardless of where your organization is in its fundraising journey, a Fund Development Needs Assessment provides an essential appraisal of your current fund development program (fundraising, grants, sponsorships, and other forms of donor / volunteer relationship building), as well as the organizational infrastructure available to support

fundraising initiatives. In short—a needs assessment evaluates how the organization raises money and how it can do better.

The most effective Needs Assessments use an inter-related approach to evaluate all program aspects as they relate to Fundraising / Resource Development including:

- Organizational planning
- Donor identification, cultivation, solicitation and recognition
- Board and other volunteer development
- Internal resources (staffing and systems)
- Constituency and stakeholders' development and engagement
- Policies and procedures

(Assessment of community needs in relationship to the organization's programs and services may be included as a component of the overall needs assessment or be conducted as a separate study.)

When complete, the Fund Development Needs Assessment provides the Board with an accurate picture of current fundraising activities, operations, results and opportunities. It also serves as a blueprint upon which to base further action, enabling the organization to raise more money on a more sustainable basis.

Fundraising Committee. Only in the rarest circumstances can significant amounts of money for non-profit organizations be raised by just a handful of well-connected individuals. However, many Boards of Directors sometime make the mistake of thinking that a lone organizational employee can carry out a successful fundraising campaign. In almost all cases, raising significant amounts of money for a non-profit organization requires a team effort. The greatest success comes when an overwhelming flood of well-trained volunteers is actively involved in helping to raise funds. A fundraising committee is essential because of the individual connections its members have and for the tasks it accomplishes. The individual members of the campaign committee may conduct prospective donor research, help with the development of video and print campaign presentation pieces, and manage the almost overwhelming amount of data associated with a successful campaign. They may open doors to a few potential donors and, in a few cases, actually make the ask for the non-profit organization. A fundraising committee is also essential because most non-profit organizations do not have a competent cadre of fundraising professionals on staff. A well-led and fully functioning fundraising committee, inspired by the campaign chair, can accomplish much.

Fundraising Plan. A well-organized fundraising plan must be developed and implemented. While the plan will no doubt need ongoing modification, it should guide the entire fundraising effort. Some of the essential elements of fundraising campaign include a solid Case for Support; an involved and committed Board of Directors; other stakeholders who care about the organization; the involvement of the chief executive officer; an adequate budget for the campaign; top-down, inside-out soliciting; excellent prospective donor research; a campaign committee of volunteers to work with staff; creation and implementation of a step-by-step plan; presentation pieces of professional quality; well-planned announcements and campaign awareness presentations; and contagious enthusiasm about the non-profit organization and its campaign goals and objectives.

Grateful Graduates. University graduates (and even non-graduates) are often very grateful for the education that they received and understand that their individual success was heavily influenced by that education. Community colleges and technical schools have only recently begun to realize the fundraising potential of forming a positive relationship with their own alumni. For a variety of

reasons, most non-profit organizations never contact those they have served. However, in some cases these individuals have gone on to be successful. For example, many individuals, after receiving temporary disaster help from aid organizations like the Red Cross, are able to successfully put their lives back together and are very grateful. Individuals who have recovered from a traumatic injury and successfully developed a new career are also grateful. Even the proud owners of the dogs rescued from an animal shelter can be potential donors when they are approached appropriately.

He who talks next loses. When making a presentation to a potential donor, it is important to clearly identify your organization's mission and its urgent and unmet needs, and to make the ask. Once this has been done, once someone representing the non-profit organization has said, "Would you consider making campaign gift or pledge in the range of ..." remember that "he who talks next loses." When the right person has made the ask to the right prospect at the right time, the prospect is highly likely to say *yes*. Speaking too early when you make the ask interrupts the prospective donor's process of soul-searching and assessment of how large a donation (or pledge) to make. Interrupting this process makes it far too easy for the potential donor to say *no*.

High but reasonable goals. In managing annual fundraising activities and in carrying out a multi-year fundraising campaign, you need to have high and reasonable goals. Goals established too low will not require a stretch gift of those who care about your non-profit organization. Goals set too high may scare away potential fundraising leaders and volunteers. The fundraising goal should be clearly tied to urgent, unmet, and compelling needs. Time and time again, successful non-profit organizations have been able to triple their annual fund by establishing clear goals and implementing strategies to meet those goals. The amount of money that can be raised in a multi-year campaign can easily be 10 to 20 times the amount of money that an organization raises in its annual fund.

Honorary Campaign Chair. This individual is normally someone with significant power and influence that is willing to be publicly recognized for involvement with your non-profit organization's campaign. The Honorary Campaign Chair will be expected to make a limited number of public presentations on behalf of the organization and its fundraising campaign and to attract others to the campaign. By giving your organization their names, their faces, and their time, these individuals have also given your organization a significantly increased status and level of acceptance. Honorary Campaign Chairs are expected to be one of the largest contributors to the campaign and, if appropriate, also obtain substantial gifts from their business or employer. Honorary Campaign Chairs might also, on a very limited basis, accompany staff when potential large donors are asked to make their gifts. The Honorary Campaign Chair must work closely with the campaign chair and coordinate efforts and activities with the non-profit organization's leadership.

Inside-Out, Top-Down (TOP-DOWN, INSIDE-OUT). To be successful, a multi-year fundraising campaign must operate from the inside out. The volunteer and paid leadership of the non-profit organization must be some of the first individuals to commit to the multi-year fundraising campaign. They must make individual stretch gifts and, where appropriate, obtain such gifts from their business or employer. It is critical that individuals with the greatest capacity to give make their commitments first. When the non-profit organization's volunteer and paid leadership have stepped forward and made their stretch gifts, they can ask others to do the same.

About 20 percent of an organization's leadership is likely to be in a position to make a substantial gift. It is critical that these people make their gifts first and then talk to others with the same capacity to donate. Starting with smaller gifts does not call others to stretch their own gifting capacity and

may inadvertently establish for some potential donors a much lower level of acceptable giving than they had anticipated they would be asked to pledge.

Integrated Campaign. An integrated campaign coordinates several fundraising goals and activities. Such campaigns may raise money to fund capital or building projects, to build up endowments, to develop new service opportunities and to maintain current annual giving. Most successful fundraising organizations do not want to give up the annual relationship they have with some donors, they do not want to lose the financial and public awareness benefit of their special events, and they do not want donors to stop naming them in their estate plans. A well-done special campaign will not conflict with regularly scheduled fundraising events. Normally, after a successful integrated campaign is completed, the amount of funds a quality non-profit or faith-based organization receives annually is double the amount of funds it received prior to integrating a special campaign with its ongoing fundraising efforts.

Inter-Generational Equity. Some volunteer and paid leadership of non-profit organizations mistakenly believe that they are being responsible when their fiscally very conservative practices have accumulated an abundance of assets with little or no debt. Some organizations have overwhelming cash reserves; if handled well, this type of stewardship is to be applauded. However, if taken to an extreme, this type of stewardship can become an example of failing to maintain proper intergenerational equity. In extreme cases, such non-profit organizations have chosen to limit or even ration services today to maintain fiscal strength for future generations. Sometimes, because of their fiscal strength, such non-profit organizations see no need to engage in any fundraising efforts. Potential donors and grateful graduates have not been given a chance to help those organizations. In addition, the example such an organization sets can confuse potential donors to your organization's multi-year fundraising campaign.

Investing Wealth. Successful people and people with power and influence normally have significant personal financial resources and the ability to bring the financial resources of others to your non-profit organization. While some potential significant donors may simply have inherited their wealth, many of your potential significant donors have wealth because they earned it and worked to get a good return on every investment that they made. Whether they inherited their wealth or earned it, significant donors expect a good return on the money they donate. For these individuals, a significant donation simply means choosing to invest their wealth in your non-profit organization. They will expect that your organization produce the results you promised when you made the ask.

Make the Ask. For your non-profit organization to be successful in fundraising, it will be necessary to make the ask. The volunteer and paid leadership of your non-profit organization must learn to share a vivid vision of urgent needs and of what can be done to meet those needs. Volunteer and paid leadership must speak publicly and talk with deep personal passion. They must be well-positioned and prepared to make the ask, with no shame at all, over and over again. If they are properly prepared, prospective donors will be excited and pleased that they were invited to help your non-profit organization by making substantial gifts of their resources. Your non-profit organization will not be successful in fundraising unless YOU make the ask.

Mighty Mission. Mission is everything. It must drive everything your non-profit organization does. It should guide strategic planning and day-to-day operations. Your Mighty Mission should be clear, inspire support, and motivate others. It must be concise and easy to remember and share with others. Others connected with your organization must know of your organization's Mighty Mission

and believe that with their help it can be achieved. Then, with a deep sense of passion, they will tell their own story of involvement with your organization and speak with pride of your non-profit organization and its Mighty Mission.

Never Give Up. It is all too easy to say “I can’t” or “we tried, but they said *no*.” Your organization has a Mighty Mission. When you must raise money to meet urgent and compelling needs, when people with power and influence have given of their time and talents to your non-profit to your organization, with their help, you will succeed. In fundraising there is no such thing as failure—only one more opportunity for success. Most potential donors, when approached by a social and financial peer, will make a contribution; it just might not be as big as you hoped it would be. Even when a potential donor has turned you down, you’ve had the opportunity to tell the story of the organization, to talk of its Mighty Mission, and to point out urgent and unmet needs to a person with power and influence. Even the few donors who do not make a donation will know far more about your organization and its Mighty Mission than they ever did before. Even these individuals might be potential donors for your organization’s next fundraising campaign.

Non-Governmental Organization (NGO). Some membership organizations such as Rotary International and Lions Clubs have lengthy histories of local and international service. These organizations may not be 501(c)3 non-profit organizations because of their membership focus, but they do wonderful things. Other non-governmental organizations may be short lived and informal in nature. Elementary or high school children raising money to purchase wheel chairs are one such example.

Open Doors. Access to potential donors must be achieved. Some potential donors are close friends and relatives, and access to them is easy. Doors of access to elected public officials are normally easy to open. Quite often potential donors with the ability to make substantial donations are hard to access. They may have formally established gatekeepers such as administrative assistants or a limited number of close associates who can open doors of access to them. The doors can often be opened by your non-profit organization’s Honorary Campaign Chair, by members of the campaign committee, or by selected volunteers. When they open the doors of access, they have given an informal, but overwhelmingly powerful, endorsement of your non-profit organization and oftentimes of your fundraising campaign. Once you have gained access to, and earned the trust of, potential donors who have the ability to make substantial donations, these individuals will open more doors.

Organizational Awareness Potential. As your organization interacts with current and potential donors, you build a clear, but hard to calculate, potential for those whom you have contacted to increase or continue their giving to your organization. The more hands-on the experience the donors or donor prospects had, the higher the potential that they will make a donation at some time in the near future. The authors’ experience has shown that this potential ranges between 1% and 11% of the amount of funds raised by the type of fundraising activity with which the donors or potential donors were involved.

People with Significant Power and Influence. Every community has official and unofficial leaders. These are the people who, regardless of their official status, just seem to get things done. These are the people who need be involved in your fundraising efforts. They can recruit an individual to serve as Honorary Campaign Chair. They have the ability to go through doors you and your organization would never have the chance to open. They may or may not have significant personal wealth, but they have access to those who do have such wealth. With their help, your non-

profit can do much to fulfill its Mighty Mission. If they resist your efforts, progress will be all but impossible. People with power and influence need to be involved with, committed to, and emotionally connected to your non-profit organization

Personal Contacts. Leaders achieve much by inspiring others to give of their time and talents. It is only through others that funds are raised. Those already associated with your non-profit organization stay connected for various reasons. Their network of family and friends is large, and their ability to use these and other personal contacts to help your non-profit organization achieve its Mighty Mission is huge. Most often, they have superiors at work, they have business contacts, and they have connections at their house of worship and in their service organizations. Even in retirement communities, members of sororities, bridge clubs, resident choruses, book clubs, and other groups talk to each other about what is important to them. Those who believe in your non-profit organization will introduce you to their personal contacts when they understand the need and know how to do so. The rest is up to your organization.

Philanthropy. Philanthropy is “the love of humankind.” Philanthropists know the joy of giving. They are individuals with substantial financial resources who can’t walk away from a hurt puppy and who feel the cry of a hungry child tearing at their soul. It is very rare that a true philanthropist will make a personal stretch gift. Philanthropists give from their abundance. They make an investment in the causes and organizations in which they believe. Philanthropists will often be in the 20 percent of donors who give 80 percent of all the funds raised in a campaign. In some cases they may even give 20-50 percent of the entire fundraising campaign. Access to philanthropists is normally gained only by doors opened by other philanthropists or by people with significant power and influence. One of the most exciting adventures of a fundraising professional is helping a person with significant wealth become a joyful and lifelong philanthropist. But those who would solicit donations from others must to the extent that is personally practical become mini-philanthropists themselves.

Prospecting Party. A prospecting party is simply getting a group of individuals who know of your non-profit or faith-based organization together to identify individuals who have the capacity to make major or significant gifts to an organization. A group of eight to twelve people meets together. The meeting is facilitated by a leader of the faith-based or non-profit organization. A presentation is made about the organization’s Mighty Mission and its related urgent and compelling unmet needs. The person leading the meeting then begins an exercise designed to develop a list of good prospects. Often this is done by giving each person present small slips of paper. Attendees are then asked to put on each slip of paper the names of the most powerful people they know. A prospect is considered to be known if a phone call from the volunteer who named the prospect would be returned. This list of individuals is then refined. The group then determines which of those listed are the best prospective donors for the level of giving the prospecting party is targeting. The group then determines who is best qualified to contact these prospective donors.

Public Awareness Materials. Non-profit organizational leaders often assume too much. They believe that because they have prepared brochures, sent out newsletters, and are occasionally in the newspaper, the public understands their organization. While general public awareness should be an ongoing effort for all non-profit organizations, public awareness during a fundraising campaign is critical. A professional-quality Case for Support must be prepared in multiple formats. Material that can be customized for each individual presentation to a prospective donor must be available. Slide shows and appropriate leave-behind pieces need to be prepared for presentations or service clubs. Material must also be developed for dissemination to the general public near the end of the

campaign. Some individuals or businesses may provide this material at no cost, and others may specifically pay for the cost of such material. These materials must present the image of a strong organization while avoiding the appearance of having invested too much money in producing these materials.

Right person, right prospect, right time, right cause, right amount. It is important to carefully set the stage and tailor each solicitation call to the specific individual or entity being solicited. Success comes when the right person makes a call on the right prospect, at the right time, for the right cause, and for the right amount. The right person making the call is a social and economic peer of the prospective donor. The right prospect is an individual who has been identified as having some interest in the organization; ideally, the prospect also has a meaningful relation with the person making the solicitation call. The right time for a solicitation call may be after the prospective donor has become somewhat aware that a fundraising campaign is underway, but does not know the details. The right cause is one that is of current interest to the prospect or in which there is reason to believe the prospect might become interested. The right amount requested during the solicitation call needs to be at a level that matches what the prospect has given to other causes and an amount that will likely require the prospect to rearrange investments prior to paying off a pledge.

Segment Prospective Donors. After a list of prospective donors has been established, it can be very valuable to sort (or segment) this list into multiple categories. Prospective donors can be sorted by the size of potential donation, by the industry in which they work, or other appropriate categories. They can be sorted by their current relationship with the non-profit organization (for example, parents of persons served, individuals, board members, volunteers, current donors, etc.). Once the list of prospective donors has been sorted into appropriate categories, it is easier to determine which persons who are helping with the fundraising effort already have personal contacts with the prospective donors in a particular category. It is also helpful to establish a well-planned sequence of contacting prospective donors within a particular category. For example, sometimes, after a prospective donor has agreed to make a donation, that donor will help with the solicitation of some of the other donors in their category.

Specific and Measurable Goals. Well-run non-profit organizations utilize strategic planning and establish specific and measurable goals that, if achieved, will further the organization's mission. This process easily leads to the formation of a strong fundraising Case for Support. During a fundraising campaign, it is critical that it is clear how much money is to be raised and that dates are established by which specific phases of the fundraising should be completed. It will most often be necessary to establish intermediate goals, strategies to achieve those goals, clear indicators of when a goal is achieved, and the individual(s) responsible for achieving these goals. This process helps the campaign chair assign work and keep track of success. It also allows for celebration when intermediate goals are met.

Stretch Gift. A simple way of determining whether a pledge is a stretch gift is the reaction you get when you go home and share with your significant other(s) the amount of your pledge. If they, without prompting, loudly exclaim, "You pledged *what!*" you have made a stretch gift. All—yes, this means 100%—of the members of the Board of Directors and the organization's senior paid leadership must annually make a stretch gift to their non-profit organization. Once a fundraising campaign is undertaken, these same individuals must make an additional stretch gift to the campaign. Their example is critical. If the Board of Directors and the senior leadership of the

organization are not willing to make stretch gifts, why should any prospective donor ever say *yes* to a request for a donation?

Successful Solicitation. It is of critical importance to set the stage for all solicitation calls carefully. Success comes when the right person makes a call on the right prospect, at the right time, for the right cause and for the right amount. Most potential donors approached by a social and financial peer will make a contribution; it just might not be as big as was hoped for.

Talk to People Who Have Money. While it seems so obvious, some fundraisers have not yet figured out that to raise significant amount of funds, it is necessary to talk to people who have money. It is highly likely that 80% of all funds raised during a campaign will come from 20% of the individuals or organizations contacted. In some cases, where solicitation calls are not well-planned and finely tailored to individuals, only 25% of the individuals approached will agree to make a substantial contribution. If this is the case, then it really makes sense to meet first with 40 prospects that each has the capacity to make a pledge of \$100,000 instead of starting with those who are more likely to make pledges of \$5,000 or even less. Because most non-profit organizations provide public services, it will eventually be important to give the general public an opportunity to participate in a campaign.

Target Prospective Donors. It is very important to segment prospective donors and to utilize a well-considered approach targeted to each prospective donor. Always—yes, always—utilize the top-down, inside-out sequence of donor solicitation. Of course, it is also necessary to have obtained substantial pledges from the non-profit organization's paid and volunteer leadership before going to outside prospects. The likelihood of success with prospective donors is significantly increased once a non-profit organization targets its solicitation calls to have the right person makes a call on the right prospect, at the right time, for the right cause and for the right amount.

Thank Every Donor Seven Times. Donors do not give for recognition. They do not give for tax write-offs. Donors give because they believe in an organization and its mission. However, the number one reason donors give is because someone asks them. The number one reason donors stop giving is because no one thanked them in ways that were meaningful and personal. A plan should be in place to ensure that every donor is thanked seven times. The greater the size of the donation, the more personalized the process of thanking the donor should be. Thanking every donor seven times also increases the likelihood of maintaining contact with every donor. It is important to never lose contact with a donor. Past donors are always the best prospects for future donations.

Top-down, Inside-Out (INSIDE-OUT, TOP-DOWN). To be successful, a multi-year fundraising campaign must begin from the inside out. The volunteer and paid leadership of the non-profit organization must be among the first individuals to commit to the multi-year fundraising campaign. They must make individual stretch gifts and, where appropriate, obtain such gifts from their business or employer. It is critical that individuals with the greatest capacity to give make their commitments first. When the non-profit organization's volunteer and paid leadership have stepped forward and made their stretch gifts, they can ask others to do the same. When 20 percent of the organization's volunteer and paid leadership have made their pledges, 80 percent of the funds to be raised by the volunteer and paid leadership have already been achieved. Starting with the smaller gifts does not call others to stretch their own gifting capacity and may inadvertently establish for some potential donors a much lower level of acceptable giving than they had anticipated they would pledge.

Urgent Needs. To significantly raise significant amount of funds, non-profit organizations must have a Mighty Mission and they must have develop a strong and compelling Case for Support. This Case for Support should have emerged from the organization's strategic planning. Having a strong plan in place to do the things that must be done to meet urgent needs motivates donors. While donors base their decisions on a variety of intellectual and relational issues, their decisions are also based on emotion. If the needs are real, if the needs must be met, donors will give. Donors may be responsive to true financial emergencies, but they will be not likely give to such emergencies a second time. Normally, donors are reluctant to give for such things as reducing reliance on government funding, paying off long-term debt, and building cash reserve funds. While university fundraising personnel are often successful at raising endowment funds, this is not easy for most non-profit organizations and should only be undertaken as part of a well-planned fundraising campaign. Even then, it is often best done as part of a multi-purpose campaign.

Utilize Personal Contacts. Successful fundraising for non-profit organizations is achieved by the time and talents of many. One of the primary responsibilities of the volunteer members of the campaign committee, its chair, and any Honorary Campaign Chairs is to provide access to their network of family, friends, business, and other personal contacts. Volunteers who believe in your non-profit organization will introduce you to their personal contacts when they understand the need and know how to do so. They will even, when properly inspired and trained, accompany fundraising staff on solicitation calls. Once they have done this and had success, they can often be relied upon to make additional solicitation calls both to their own personal contacts and to other appropriate prospective donors.

Vivid Vision. To raise any substantial amount of funds at all, a non-profit organization must have a clear picture of what the urgent and compelling needs are and what must be done to meet those needs. It is critical that a crystal clear, powerful and easy-to-visualize picture is developed and shared with volunteers and with potential donors over and over again. The non-profit needs its potential donors to see in their own minds a picture of the way things will be when the needs are met. Every time the needs are presented, whether it be in the Case for Support or in individual solicitation calls, the needs should create an urge to positive action to help meet those needs. The vivid vision must be available in many formats and shared with deep personal passion over and over again to all who will listen.

Volunteer Fundraisers. Most successful non-profit organizational fundraising is done by volunteers working with the non-profit organization's staff and perhaps the assistance of fundraising professionals and consultants. Potential volunteers, just like potential donors, must be carefully sought out and inspired. They must have a passion for the mission of the non-profit organization and have been selected for their personal skills or for their personal contacts. Every community has one or more individuals who could be called volunteer fundraisers extraordinaire. Sometimes these individuals are highly visible and sometimes they, quietly and out of sight, raise millions upon millions of dollars for the causes in which they believe. When relationships are developed with these individuals and when the time is right they may become the campaign chair or Honorary Chair of your organization's fundraising campaign. These volunteers can access people and raise funds the non-profit organization could not gain without their assistance

Professional and even volunteer fundraisers develop new confidence, poise and professional skills. Individuals who become successful fundraisers will, while giving of themselves to the organizations they love, be forever changed. For these special individuals fundraising becomes a

calling. Over time, one success after another and one turn down after another, they develop—as you will—thick skin, a soft heart, exceptional hearing, a quick mind, a slow tongue, and no shame.

NOTE:

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