

FUNDRAISING IDEAS THAT WORK!

Grassroots Fundraising Journal

VOLUME 23 • NUMBER 1 • JANUARY/FEBRUARY 2004

Using E-mail for Fundraising:

**Put E-mail to Work
(Without Becoming
a Spam Artist)**

MICHAEL STEIN

**Viral Fundraising:
In the News and
On the Net**

JASON SALZMAN

Also in this issue:

The Ten Most Important Things
You Can Know About Fundraising

BOOK REVIEW: You Can Do It!
A Volunteer's Guide to Raising Money
for Your Group in Words and Pictures



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LETTER FROM THE PUBLISHER

KIM KLEIN

Welcome to 2004, and the 23rd year of the *Grassroots Fundraising Journal*. Thanks to all of you who helped us last year with donations — your donations are critical to keep the *Journal* accessible to grassroots organizations everywhere. I am always touched when someone sends money to the *Journal* in addition to their subscription fee. Those gifts inspire all of us to do the very best job we can in bringing our readers useful information on community-based fundraising.

On that note, the most exciting work in progress going on at the *Journal* is the redesign of our website by our unbelievably talented webmaster, Adena Chung. Adena follows in the footsteps of our first webmaster, Taylor Root, who set a high bar. Taylor has now gone into the wine business, and we wish him the best in that endeavor.

Adena has redesigned our site to make it easier to find what you need, whether it's help with your subscription or your fundraising. As you may have seen, articles from the *Journal* are available for downloading as PDF files for only \$3 each. Now you can sort the article archive list by title, issue, author, and subject, making it easier for you to locate what you're looking for. We have carefully pruned and updated our content, and we've added some new features, like Letters to the Editor. Although we haven't published Letters to the Editor in the past (unless they contained an important correction to an article or a useful how-to element), many of those we receive are full of interesting information. Now you can not only read them online, you can send some of your own!

Check out the website's total makeover by heading over to your computer when you finish reading this issue and visiting us at www.grassrootsfundraising.org.

At the risk of being self-aggrandizing, I am also pleased to announce the publication of my latest book, *Fundraising in Times of Crisis*. In it I explore both the turbulent times we are in now, which are creating funding crises right and left, as well as other ways that organizations get into crisis situations. I point out how to keep raising money while you work on solving your problems. You can order this book from a link to the publisher on our website or by going to www.josseybass.com/go/chardonpress or by calling 800-956-7739.

And since everything I have discussed so far has had a virtual address at the end of it, it is appropriate that this issue of the *Journal* has two excellent articles about using e-mail and the Internet to raise money. Michael Stein, Associate Director for Groundspring.org, discusses all the ways that a small organization can use e-mail to attract and retain donors, and Jason Salzman tells of a very successful e-mail campaign that raised \$1.5 million, with some tips on how to get your message out to large numbers of people. On a more pedestrian note, my article suggests ten things about fundraising that will always be true, in all realities, except perhaps parallel realities.

Enjoy!

PUT E-MAIL TO WORK

Without Becoming a Spam Artist

BY MICHAEL STEIN



Oh, e-mail! For many individuals and organizations, e-mail has transformed both the quantity and quality of human communication. Simultaneously intimate and public, e-mail is a daily symbol of the potential and danger that technology promises. To some, e-mail is a simple and sublime medium to communicate in the modern world. To others — and often the same people — it is a reviled and bottomless pit of unwanted spam that infuriates and frustrates.

Nonprofit organizations of all sizes and budgets are exploring how to integrate e-mail into a comprehensive communications and fundraising strategy. Some are far along the road of doing so; others are just starting out. This article provides an overview of why and how to use e-mail in your fundraising program.

From a communications point of view, it's important to be sensitive to when it's appropriate to use e-mail, and when the phone or regular post mail is better.

THE BENEFITS OF E-MAIL

E-mail is a flexible and easy-to-use medium for both the sender and the receiver. E-mail is important precisely because it's regular, constant, and often the way most people engage with the Internet. It's fast, cheap, easy to use, and informal. There's also that quality of its being "viral" — that is, e-mail is content that's easy for your readers to pass on by forwarding. As many organizations can attest, this can exponentially expand your network and reach.

E-mail brings immediate response, allowing us to gauge how well we're reaching our constituencies. The

benefits of that immediacy goes both ways: now your community can have more access to you and provide the gold of any good relationship: a dynamic feedback loop.

E-mail can also provide content in its own right. The voice, style, presentation and format are all critical to your success. E-mail is fast, but that doesn't mean that you can jot off e-mails without foresight and the help of an editor.

Recently, one organization, MoveOn.org, has demonstrated how effective the personal e-mail voice can be. MoveOn has a database of two million e-mail subscribers, but each mailing they send feels as though it's written to just the reader receiving it because each communication is written in a direct, simple, clear and personal voice. One way they achieve this is by keeping each e-mail focused on one central thought.

The same virtues of e-mail also highlight its limitations. While it's fast and easy, it's also rather "disposable," as it's easy to delete. The very quality of immediacy can negate its power and impact. When sending e-mail, we are dealing with the dreaded domain of unwanted e-mail or "spam," a sensitive issue for many e-mail users.

That "send" button warrants perhaps more caution and respect before we use it. From a communications point of view, it's important to be sensitive to when it's appropriate to use e-mail, and when the phone or regular post mail is better.

INTEGRATE E-MAIL INTO YOUR FUNDRAISING MIX

There are several reasons that e-mail should be seen as the foundation, or basic unit, of your online fundraising practices and strategy. The key to understanding e-mail — and leveraging it to suit your needs — is to recognize how it gracefully complements all aspects of your communications — from your website to the forms people fill out when they mail in a donation and the ways you ask for donations. Simply stated, e-mail is now a vital part of all of your outreach and communications.

E-mail can complement your fundraising efforts by enabling you to create campaigns, conduct seasonal fundraising, and work across mediums by integrating it with your other fundraising strategies, including direct-mail, web, phone, face-to-face solicitations, and events.

E-mail can be effective at augmenting some of your current fundraising practices. For example, you may choose to send an e-mail newsletter at the same time that you're mailing a direct mail appeal, or send a personal e-mail "thanks" after you've made a phone call. More and more, supporters and donors are becoming comfortable with being contacted in multiple mediums. E-mail is now ubiquitous enough that you can even make the "ask" in e-mail. Asking for financial support via e-mail is most effective when that donor originally donated via your website.

In all these instances, the idea is to use e-mail to cultivate dynamic, strong relations with your donors — and prospective donors.

HOW TO USE E-MAIL TO EXPAND YOUR DONOR RELATIONSHIPS

There are three major formats to reach your members or prospective members through e-mail: e-newsletters, action alerts, and donation appeals.

Publish a Regular e-Newsletter to Reach Out and Touch People

The e-newsletter is arguably the most effective use of e-mail at this time. It's malleable, dynamic, and easy to produce. The e-newsletter is where using e-mail shines. You can keep your community in the loop, present a personal and branded mode of communication, conduct a very efficient and inexpensive method of regular updates, and get as fancy or plain as you want to.

One common e-newsletter formatting question for organizations concerns the "plain text or HTML" issue. HTML stands for "Hypertext Markup Language," which is the basic

programming language for creating web pages. HTML when in e-mail enables messages to appear with complex formatting of fonts, columns, and embedded images.

There are increasing numbers of inexpensive tools to use to create your own HTML e-mail template, and several Internet vendors specialize in HTML e-mail creation and delivery (see sidebar on page 11 for a list of vendors). Recent studies demonstrate that recipients receiving messages in HTML are more likely to pass the message on and to "click-through" to the organization's website.

However, not everyone has the kind of sophisticated e-mail application required to view HTML. Fortunately, most vendors who send e-newsletters use what's called an "HTML sniffer," a feature that automatically substitutes a plain-text e-mail message if

the recipient's e-mail program cannot handle HTML. Keep in mind, too, that the more graphically fancy your newsletter is, the longer it takes to download regardless of the e-mail application.

Use the "Action Alert" Model to Mobilize Supporters

The action alert is perhaps the first real application of e-mail by nonprofits, beginning with simple text e-mails circulating among lists of affinity groups and communities. The action alert has evolved, thanks to the advancements in vendor technology, to provide more leverage and options for how you choose to mobilize your constituencies.

For example, you can now efficiently target action alerts to specific individuals by narrowing your list by any of your database fields, such as zip code, state, or issue interest. Technology also allows you to create follow-up e-mails based on previous responses to earlier action alerts. So, for example, you might filter your list by all the people who sent faxes from your website last month.

Don't Fear Using E-mail to Make a Direct Appeal for Donations

Most donors give simply because they're asked. It's that simple. E-mail can be effectively used for donation appeals. E-mail tends to work best when it's used as part of a coordinated effort across multiple mediums. For example, you may be raising money to send a delegation to the state capital by conducting a variety of fundraising activities, such as house parties, a print mailing, and a phone campaign. Adding an e-mail component to this campaign and encouraging people to forward the e-mail to five friends will help spread the word and tie in well to the other activities.

Other occasions that work well for e-mail appeals are

Asking for financial support via e-mail is most effective when that donor originally donated via your website.

seasonal occasions, such as an annual fund drive, an awards dinner, or a holiday. Again, online fundraising works best when it's coordinated with a real-world activity.

MoveOn.org is a vivid case study in how personal, direct, and simple e-mail solicitations can work. MoveOn follows a few basic guidelines that ensure their success: they solicit on rare occasions that tie in with real-world urgencies (such as the invasion into Iraq); they make the pitch transparently clear and tied to a specific campaign; and they communicate with clear language and from a distinct person.

HOW TO GET MORE FROM E-MAIL

There are several other uses to which you can put e-mail.

Use E-mail to Drive Traffic to Your Website

E-mail notices are particularly effective at getting your e-mail reader to visit your website. If your organization's website is rich in resources and content, with frequent changes or additions of information, you can use e-mail notices to inform people when you have made updates to your website.

Specific update e-mails can be a simple and quick way to drive traffic to your website, while providing a service to your community. This is also a good way to use your e-newsletter, as it can provide hyperlinks to new content on the website.

While your website is extremely important, it's vital to view your e-mail and website as *integrated* and working together. View e-mail as the outreach aspect of your website and your organization's content; it's what goes out, and on the website is where the substantial content resides. E-mails are tasters, reminders — ideally used for short messages, time-specific items, and action prompts.

The e-mail should drive traffic to your site with links. Using technology to track your e-mail "click-throughs" allows you to measure how well your e-mail efforts are working (see sidebar). When you send an e-mail out, how is the traffic to your site affected? If you don't see a rise in traffic, how can you modify your e-mail messaging to enhance traffic?

Segment Content to Communicate Better

Many organizations decide to tailor their e-mail messaging to their various constituencies and communities. If your organization has lots of rich content to share, it's extremely effective to package this content to specialized lists.

For example, the nonprofit think tank Redefining Progress begins with a simple link on their homepage that the reader can click to receive electronic updates about the group's work. The visitor is taken to a sign-up page where they can select from a menu of newsletters based on issue areas. This enables Redefining Progress to segment

their list based on issue area, while learning more about their community and catering to the distinct needs of their diverse constituencies.

What does this have to do with fundraising? Everything. Stronger traction with your members and community through more personalized communication translates into higher yields when it comes time for fundraising. It also increases the value to the reader of participating in the organization.

Evaluate Your E-mail Effectiveness

It's essential to evaluate your e-mail practices continually to gauge their effectiveness and whether you are meeting your desired outcomes. Assembling a profile of your e-mail practices can inform decisions about features like formatting, content, and timing.

Measure the number of new e-newsletter subscribers and the number of unsubscribers every month, charting them in a spreadsheet. When you notice spikes in either subscriptions or unsubscriptions, look at what was happening with your e-messages during that time to identify how your approach is working and what may need to be modified.

Many e-mail vendors used for sending electronic newsletters have built-in features for tracking whether the e-mail is received, opened, and whether the recipient clicked through to your website or took some other action, such as forwarding the e-mail to others. You will find this information to be enormously valuable — and it's exciting to have such a "live" reading of how people are responding to your communications. E-mail is one of the few mediums that can allow you to do that.

Adding an e-mail component to a fundraising campaign and encouraging people to forward the e-mail to five friends will help spread the word.

E-mail is not intended to be a substitute for "live" relationships — meeting with your donors and other supporters, whether one-on-one or in group settings.

Use E-mail Respectfully

Issues of privacy are increasingly important for people on both sides of the e-mail screen — the sender and the receiver. Therefore, when you ask for people’s e-mail address, let them know exactly what you intend to do with that information.

The most important things to make clear in a first e-mail are whether or not you will share their e-mail address

Choosing E-mail Vendors

There are several important features to keep in mind when selecting a vendor to work with for sending e-mails.

- *Easy to subscribe, unsubscribe.* You need to ensure your subscribers can easily take themselves off of the list. Likewise, make it easy to join as well.
- *Automatic removal of unsubscribes and bounces.* Most e-mail services offer this as a basic feature; it enables you to have “clean” data, which will greatly increase efficiency (and decrease costs).
- *Ability to segment list.* This more sophisticated feature allows you to manage your data by separating respondents according to interest, activity, or geography. Increased segmentation means increased ability to target your respondents.
- *Track “click-throughs.”* This is a vital feature that provides the feedback you need to gauge and measure your efficacy.
- *Ability to set “From” and “Reply” addresses.* Not always available on free services, but a basic feature on a service you pay for. This is a key determinant in controlling your mailings as “spam,” as many e-mail providers now have “spam blockers” that act as filters. The “From” line is often the key site for such filters.
- *HTML sniffer.* This feature enables the detection of HTML capacity in the recipient’s e-mail program and automatically substitutes a plain-text e-mail message if HTML cannot be received.

Here is a short listing of vendor services. Learn about other services by going online or asking other nonprofits you work with which services they use and how they like them.

- *Free Services:* Topica, YahooGroups.
- *Affordable Services:* Cooler.com, ConstantContact.com, Groundspring.org’s E-mailNow, iMakeNews, MailerMailer.com, Microsoft bCentral, NPOGroups.org, SparkList.com, Topica E-mail Publisher, VerticalResponse.com, and others.
- *“Higher Grade” Services — more complex services that allow for more features and customization, for a higher cost:* Blackbaud, Convio, CTSG, GetActive Software, Groupstone, Kintera, LocalVoice.

The Technology (and Terminology) of E-mail

- **Application Service Provider (ASP)** is an Internet vendor that offers online services to store, manage, and conduct e-mail messaging campaigns.
- **Hypertext Links** are embedded links in your e-mail, such as “Click here to read more.” This is commonly used in both plain text and HTML e-newsletters.
- **Viral Marketing** refers to the practice of forwarding and “telling a friend,” such as “E-mail this article/newsletter/alert/call for support to a friend.”
- **Personalized E-mail** is using software to include the name of the recipient, such as “Dear Susan, please send a fax today.”
- **List Segmentation** is a technically savvy and effective way of understanding who your donors/supporters are based on interest, activity, or demographics — such as an issue area, if someone sent a fax, or geography.
- **Click-through Tracking** is the practice of measuring the rate at which your e-mail recipients are clicking on links in your e-mail messages. This rate can help you assess interest in specific issues and programs.
- **Plain Text E-mail** is an e-mail message with a minimal amount of formatting. Quick to make, easy to create, and small in size.
- **HTML E-mail** is an e-mail message with complex formatting of fonts, columns and embedded images. Harder to create, larger in size, they often assure higher click-through response rates.

with other partners, how people can unsubscribe (“opt-out”), and how people can contact you with complaints.

The last thing you want is for people to feel you are abusing their e-mail address. This fear can be easily avoided by making your practices and intentions transparent from the get-go. A good method is to create a privacy statement on your website that people can review when they sign up or give you their e-mail address.

Avoid Spam Filters with Effective Practices

After all your work, you need to know how to avoid having your lovingly crafted e-newsletters and other e-mail communiqués relegated to the “trash” bin by a spam filter. Spam filters are programs e-mail users can set up that automatically delete e-mail messages according to criteria the user establishes.

A large factor in avoiding having your message deleted has to do with the From, To, and Subject lines in your e-mail communications. The “From” line should clearly identify your organization so that there is no doubt in the

recipient's mind about who the e-mail is from. The "To" line should show the name of one recipient, rather than a "suppressed list." The "Subject" line should identify the e-newsletter and maybe the issue date.

For example, each e-mail from MoveOn.org comes from one of their staff, and this name appears in the From: line in the e-mail, thereby reducing the likelihood of interpreting their e-mails as spam.

*View e-mail
as the outreach
aspect of your
website.*

Collect E-mail Addresses Everywhere You Can

Does your website offer a box where the visitor can enter their e-mail address to receive further information by e-mail or subscribe to an e-newsletter? When people join your organization, whether by postal mail or online, is there an e-mail field to enter?

Collect e-mail everywhere, both online and off. An e-mail address is a basic piece of data about your donor, member, supporter, or affiliate. Therefore, you want to do everything in your power to make sure you have this data.

Do an inventory on how you collect data and information about your prospective supporter. There should be a sign-up option on all your website pages and on all your giving forms, phone calls, mailings, at all events — in other words, at every opportunity.

While you're collecting e-mail addresses, be sure to have people also give their full name, postal address, zip code, and possibly interests. It's also useful to know how they found their way to your organization.

E-MAIL IS ABOUT CULTIVATING RELATIONSHIPS

Using e-mail for fundraising is much more than literally soliciting for support. It's about cultivating relationships, keeping the feedback loops intact, and thereby ensuring a stronger base of support. E-mail is a versatile tool that can be leveraged to greatly enhance — and complement — all aspects of donor and member relations.

Once this broader picture is firmly in place, it may become more evident how each aspect of how your organization uses e-mail can be linked to your overall fundraising efforts. The range is wonderfully broad: from collecting e-mail addresses on your website to a carefully executed online fundraising campaign that uses e-mail as its central vehicle. As a core component of a broad stakeholder communications strategy, e-mail can be the glue to hold your donor relations together and create traction in your communications to yield wonderful results.

Finally, e-mail is not intended to be a substitute for "live" relationships — meeting with your donors and other supporters, whether one-on-one or in group settings. What e-mail does is add another method to be in touch with people. So be careful not to start depending on e-mail as an all-purpose fundraising communication vehicle. The harder work of real relationship building still needs to be done. **GF**

MICHAEL STEIN IS THE ASSOCIATE DIRECTOR OF GROUNDSRING.ORG, A NONPROFIT TECHNOLOGY AGENCY THAT PROVIDES INTERNET TOOLS AND TRAINING TO NONPROFITS NATIONWIDE. FIND HIM ONLINE AT WWW.MICHAELSTEIN.NET.

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VIRAL FUNDRAISING: In the News and On the Net

BY JASON SALZMAN

Every now and then, a grassroots fundraising campaign — powered by the news media and the Internet — breathes hope into the souls of even the most hopeless activists among us.

Here's what I mean. In July, 2002, two women were horrified that the Bush Administration cut congressionally approved funds for the United Nations Population Fund (UNFPA), which is the world's largest international source of funding for voluntary family planning and reproductive health programs. It operates in more than 140 of the world's poorest nations.

President Bush withheld the U.S. money based on an arcane law that allows the president to de-fund any international organization that supports forced abortions or coercive sterilizations. Under pressure from special interests opposed to family planning, the president made this decision despite his own state department's investigation concluding that the UNFPA "was not involved in any coercive activities wherever it operated in the world."

So, like good activists, a pair of remarkable women transformed their anger toward the administration and concern for the world's women into action by writing letters and mobilizing supporters. One woman, Jane Roberts, wrote to the editor of her local newspaper; the other woman, Lois Abraham, sent an e-mail to 40 of her friends.

Both women suggested that 34 million Americans contribute at least \$1 to replace the \$34 million cut by Bush — and to make a statement to the world that Americans care.

Here's Jane Roberts's letter to the editor, published in the San Bernardino *Sun* in July, 2002.

A week has passed since the Bush Administration decided to deny the \$34 million voted by the Congress for the United Nations Population Fund. Ho hum, this is vacation time. Columnists have written about it — "Decision to cut off U.N. funds ludicrous" (Ellen Goodman) — and newspapers have written editorials of lament. Ho hum. More women die in childbirth in a few days than terrorism

kills people in a year. Ho hum. Some little girl is having her genitals cut with a cactus needle. Ho hum, that's just a cultural thing. As an exercise in outraged democracy, would 34 million Americans please join me and send \$1 each to the U.S. Committee for UNFPA! That would right a terrible wrong and drown out the ho hums.

— Jane Roberts

This simple idea first swept over the Internet, spontaneously inspiring about 100 people per day to send dollars to the UNFPA, including author Barbara Kingsolver. A couple of months later, syndicated columnist Molly Ivins wrote a column on the campaign, and the tally of daily letters reached 500. Then, about six months after Jane and Lois made their modest proposal, Ellen Goodman wrote a column about the idea and the daily influx of letters reach 1,000. By May, 2003, more than 100,000 people had contributed a total of \$1 million.

The money is being spent on health projects all over the world, mostly benefiting women and children — thousands whose lives are at risk as a result of the Bush Administration's

UNFPA funding cut. In East Timor, for example, with funds raised through the 34 Million Friends effort the UNFPA is buying motorscooters for midwives so they can quickly reach women in need. In Eritrea, UNFPA has trained 1,000 health assistants in emergency obstetric care, helping reduce the high rate of maternal death.

To date, Lois Abraham and Jane Roberts's homegrown fundraising campaign has raised more than \$1.5 million, and various organizations — including the U.S. Committee for UNFPA and the United Nations Foundation — are working together to engage in more traditional promotion (such as news events, articles, op-eds) and fundraising (including direct mail, matching incentives) all in service of finding 34 million friends of UNFPA.

After reading this story, all good (and broke) grassroots activists are probably asking themselves: How can we replicate the 34 Million Friends Campaign — or something like it?

Viral e-mail works because each e-mail that's passed on carries the personal endorsement of whoever forwarded it.

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CREATE A VIRAL CAMPAIGN OF YOUR OWN

There's never been a better time to try to spark a similar campaign. All it takes is a powerful idea and the Internet coming together in the form of "viral marketing," which is essentially the Internet-age equivalent of promotion by word of mouth. The difference is it relies on e-mail, not your chops, to spread the word. So it's much more efficient. Even if you don't have a hot issue with the possibility of a huge national response, you can still put viral e-mail to use for your local or regional issue — though you may not raise a million dollars. Here's how it works.

You get an e-mail with a political joke, information about a rally, a funny photograph, or whatever. You compose a little note like, "Check this out," and forward the e-mail message to a dozen people you think would like it.

Your contacts receive the e-mail from you, and they forward it to their friends, and so on, spreading the message like a virus from one computer to another. The news media then writes a story about you — and fans the viral flames.

Viral e-mail works because each e-mail that's passed on carries the personal endorsement of whoever forwarded it. Because the viral e-mail comes from a person known to the recipient, the recipient will most likely pay attention to it — unlike the typical unwanted and anonymous e-mail, called spam, which lands in your e-mail box. In short, an e-mail forwarded from a friend has legitimacy.

The buzz and fundraising success of MoveOn.org, the Dean Campaign, and TrueMajority.org are just three examples of e-based campaigning that started small and grew — just like the 34 Million Friends of UNFPA. In the for-profit world, where we politicians should always search for ideas, you've got the Blair Witch Project, bloggers like Matt Drudge (boo, hiss), and Michael Moore — all of whom have used viral marketing successfully.

It's also true, of course, that for every activist whose dream comes true on the Net, thousands more are left crying hopelessly in their chamomile tea — with their

computer frozen and the radio on again.


So, don't bank on viral e-mail, but do give it a chance.

KEEP IN MIND

Here are some pointers for designing a viral campaign:

- *Design your e-mail around what's on people's minds.* In other words, rape awareness activists might launch a viral e-mail campaign when people are confronted with another celebrity-related rape case that spawns a media frenzy.
- *Be entertaining.* (Why do progressives take themselves so seriously?) People love e-mails with engaging animations (check out www.miniclip.com), photos, games (www.spankbush.com), or jokes.
- *Straightforward viral e-mails cost little or no money to create — and you can do it yourself.* To create more complicated (and expensive) viral e-mails, like animations, you will probably have to work with a techno-savvy consultant.
- *Keep it short.* All your Internet communication should use short sentences, short paragraphs, and short everything.
- *Write a brilliant zinger for the "subject" line of your e-mail.*
- *Promote your campaign in the old-fashioned news media.*

Of course, like all activism and fundraising, passivity will get you nowhere. The spontaneous success of the 34 Million Friends of UNFPA effort is great, but it was nurtured by committed activists. Your viral dream won't come true if you sit around and wait for it to happen while you engage in everyday activism. Study up and make it happen.

P.S. Send your dollar for the 34 Million Friends Campaign to 34 Million Friends of the UNFPA, 3800 Arapahoe Ave, #210, Boulder, CO, 80303. And don't forget to e-mail a friend about it, ok? 

JASON SALZMAN IS THE AUTHOR OF *MAKING THE NEWS: A GUIDE FOR ACTIVISTS AND NONPROFITS*; HE IS PRESIDENT OF CAUSECOMMUNICATIONS.COM.

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The *ten* most *important* *things* you can *know* about *fundraising*

BY KIM KLEIN

Many times at the end of a training or a speech about fundraising techniques and principles, I am asked, “What are the most important things to remember?” Usually the person asking is either a volunteer with little time to help with fundraising, a person new to fundraising and overwhelmed by the number of details she or he has to keep in mind, or a staff person who is not responsible for fundraising but wants to help.

Over the years, I have thought about what I consider the ten most important things to know about fundraising. The items are not presented in order of importance, although #1 is probably the most important; nor are they in order of difficulty. If there is any order, it is the order in which I understood these things and integrated them into my own fundraising work. Undoubtedly, other skilled fundraisers would have slightly different lists, but this list has served me well for many years. I hope you find it useful.

1. IF YOU WANT MONEY, YOU HAVE TO ASK FOR IT

While there are some people (may their kind increase) who will simply send an organization money or offer money without being asked, there are not enough of them to build a donor base around. Most people will not think to give you money unless you make your needs known. This is not because they are cheap or self-centered; it is because most people have no idea how much it costs to run a nonprofit, or how nonprofits get money. If you don't ask them, they will simply assume you are getting the money somewhere. They have no reason to think your group needs money unless you tell them, the same way they have no reason to know if you are hungry, or unhappy, or needing advice.

Millard Fuller, who founded Habitat for Humanity, says, “I have tried raising money by asking for it, and by not asking for it. I always got more by asking for it.”

2. THANK BEFORE YOU BANK

Once you receive money, you must thank the person who gave it to you. I have found that disciplining myself not to deposit checks until I have written the thank-you notes has forced me to make thank-you notes a priority. I am not rigid about this rule because if I get behind in my thank-you notes, and then don't deposit the checks for a while, the donors may wonder whether we really needed the money.

Thank-you notes do not need to be fancy and should not be long. If at all possible, they should include a personal note, even if it is from someone who doesn't know the donor. You can add something as simple as, “Hope to meet you sometime,” or “Check out our website,” or “Happy holidays,” or even, “Thanks again — your gift really helps.”

Many organizations have created note cards for staff and volunteers to use when writing thank yous. The front of the card has the logo of the group, on the top half of the inside is a relevant meaningful quote from a famous person, and the bottom half of the inside is used for the thank-you message. It is a small space, so you really can't say much.

Many databases will print out a thank-you note after you enter the information about the donor — saving valuable time. These are best if accompanied by a personal note at the bottom.

Late thank yous are better than no thank you at all, but photocopied form thank yous are almost the same as no thank you.

The long and the short of thank yous is: if you don't have time to thank donors, you don't have time to have donors.

3. DONORS ARE NOT ATMS

A survey of donors who gave away more than \$5,000 a year asked, “What is your relationship with your favorite group?” Several gave similar answers, even though they did not know each other and did not give to the same

group. All the answers were on this theme: “I would love to be considered a friend, but I am more of an ATM. They come to me when they need money, they tell me how much, I give it to them, and the next time I hear from them is when they need more.”

This is a terrible indictment of much of what passes as fundraising. When I have described this common situation in trainings, people have often asked, “How can we make sure our donors don’t feel this way?” The answer is very simple, “Make sure you don’t feel that way about your donors.”

All groups have a few “high maintenance” donors, and may be forgiven for wishing them to go on a long trip to a place without phones or e-mail. But the majority of donors require practically no attention. They have the resilience of cacti — the slightest care makes them bloom. Thank-you notes, easy-to-understand newsletters, and occasional respectful requests for extra gifts will keep people giving year in and year out.

Think of your donors as ambassadors for your group. Design your materials so that donors will be proud to give your newsletter to a friend or recommend your group when their service club or professional association is looking for an interesting speaker, or forward your e-mails to several of their colleagues.

By treating your donors as whole people who have a number of gifts to offer your group, including their financial support, you will have more financial support from existing donors, more fun fundraising, more donors, and the peace of mind of knowing that you are not treating anyone as an object.

4. MOST MONEY COMES FROM PEOPLE, AND MOST OF THOSE PEOPLE ARE NOT RICH

There are three sources of funding for all the nonprofits in the United States: earned income (such as products and fees for service), government (public sector), and the private sector, which includes foundations, corporations and individuals. For the nearly 60 years that records about who gives money away have been kept, at least 80% of this money has been shown to be given by individuals.

In 2002, total giving by the private sector was almost \$241 billion, and 84.2 percent of that (\$202 billion) was given away by individuals! These people are *all* people — there is no significant difference in giving patterns by age, race, or gender. Income is not nearly the variable that one would think: middle-class, working-class and poor people are generous givers and account for a high percentage of the money given away. In fact, a study by Arthur Blocks of the Maxwell School of Citizenship and Public Affairs at Syracuse University showed that 19% of families living on welfare give away an average of \$72 a year!

Too often, people think they can’t raise money because they don’t know any wealthy philanthropists. It is a great comfort to find that the people we know, whoever they are, are adequate to the task. Seven out of ten adults give away money. Focus your work on these givers, and help teach young people to become givers.

5. PEOPLE HAVE THE RIGHT TO SAY NO

One of the biggest mistakes I made early on as a fundraising trainer was not balancing my emphasis on the need to ask for money with the reality that people are going to say no. No one is obligated to support your group — no matter what you have done for them, no matter how wealthy they are, no matter how much they give to other groups, how close a friend they are of the director, or any other circumstance that makes it seem they would be a likely giver.

While it is possible to guilt-trip, trick, or manipulate someone into giving once, that will not work as a repeat strategy. People avoid people who make them feel bad, and they are attracted to people who make them feel good. When you can make someone feel all right about saying no, you keep the door open to a future yes, or to that person referring someone else to your group.

People say no for all kinds of reasons: they don’t have extra money right now; they just gave to another group; they don’t give at the door, over the phone, by mail; a serious crisis in their family is consuming all their emotional energy; they are in a bad mood. Rarely does their refusal have anything to do with you or your group. Sometimes people say no because they have other priorities, or they don’t understand what your group does. Sometimes we hear no when the person is just saying, “I need more time to decide,” or “I need more information,” or “I have misunderstood something you said.”

So, first be clear that the person is saying no, and not something else like, “Not now,” or “I don’t like special events.” Once you are certain that the person has said no, accept it. Go on to your next prospect. If appropriate, write the person a letter and thank them for the attention they gave to your request. Then let it go. If you don’t hear no several times a week, you are not asking enough people.

6. TO BE GOOD AT FUNDRAISING, CULTIVATE THREE TRAITS

A good fundraiser requires three character traits as much as any set of skills. These traits are first, a belief in the cause for which you are raising money and the ability to maintain that belief during defeats, tedious tasks, and financial insecurity; second, the ability to have high hopes and low expectations, allowing you to be often pleased but rarely disappointed; and third, faith in the basic goodness of people.

While fundraising is certainly a profession, people who will raise money for any kind of group are rarely effective. Fundraising is a means to an end, a way to promote a cause, a very necessary skill in achieving goals and fulfilling missions.

7. FUNDRAISING SHOULD NOT BE CONFUSED WITH FUND CHASING, FUND SQUEEZING, OR FUND HOARDING

Too often, organizations get confused about what fundraising is and is not.

If you hear that a foundation is now funding XYZ idea, and your organization has never done work in that area nor have you ever wished to do work in that area, the fact that you are well qualified to do such work is immaterial. To apply for a grant just because the money is available and not because the work will promote your mission is called fund chasing. Many groups chase money all over and, in doing so, move very far away from their mission.

Similarly, if your organization seems to be running into a deficit situation, cutting items out of the budget may be necessary but should not be confused with fundraising. When deficits loom, the fund squeezing question is, “How can we cut back on spending?”; the fundraising question is “Where can we get even more money?”

Finally, putting money aside for a rainy day, or taking money people have given you for annual operating and program work and being able to put some of it into a savings account is a good idea. Where savings becomes hoarding, however, is when no occasion seems important enough to warrant using the savings.

I know a number of groups that have cut whole staff positions and program areas rather than let money sitting in their savings be used to keep them going until more money could be raised. I know groups that overstate what they pay people, what price they pay for equipment, what they spend on rent, all to get bigger grants from foundations or larger gifts from individuals, and then put that extra into savings — savings that they have no plan for.

A group that saves money needs to have a rationale: Why are you saving this money? Under what circumstances would you spend it? Without some plan in mind, the group simply hoards money.

Fund chasing, fund squeezing, and fund hoarding need to be replaced with an ethic that directs the group to seek the money it needs, spend it wisely, and set some aside for cash-flow emergencies or future work.

8. FUNDRAISING IS AN EXCHANGE — PEOPLE PAY YOU TO DO WORK THEY CANNOT DO ALONE

Hank Rosso, founder of the Fund Raising School and my mentor for many years, spoke often about the need to eliminate the idea that fundraising was like begging.

Begging is when you ask for something you do not deserve. If you are doing good work, then you deserve to raise the money to do it. What you must do is figure out how to articulate what you are doing so that the person hearing it, if they share your values, will want to exchange their money for your work. They will pay you to do work they cannot do alone.

9. PEOPLE’S ANXIETIES ABOUT FUNDRAISING STEM FROM THEIR ANXIETIES ABOUT MONEY

Anxiety about money is learned, and it can be unlearned. If you are ever around children, you know that they have no trouble asking for anything, especially money. In fact, if you say no to a child’s request for money, they will simply ask again, or rephrase their request (“I’ll only spend it on books”), or offer an alternative (“How about if I do the dishes, then will you give me the money?”).

Everything we think and feel about money we have been taught. None of it is natural; none of it is genetic. In fact, in many countries around the world, people talk easily about money. They discuss what they earn, how much they paid for things, and it is not considered rude to ask others about salaries and costs.

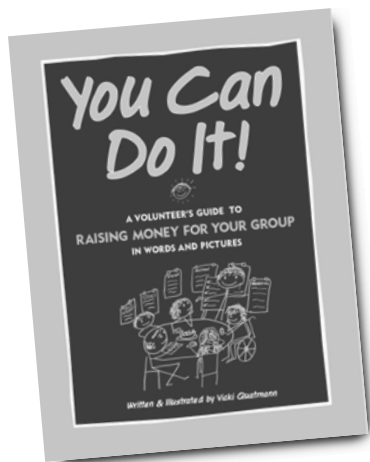
We have been taught not to talk about money or to ask for it, except under very limited circumstances. Many of us are taught that money is a private affair. Having too little or too much can be a source of shame and embarrassment, yet money is also a source of status and power. Most people would like to have more money, yet most will also admit that money doesn’t buy happiness.

As adults, we have the right — in fact, the obligation — to examine the ideas we were taught as children to ensure that they are accurate and that they promote values we want to live by as adults. Most of us have changed our thinking about sex and sexuality, about race, about age, illness and disability, about religion, about marriage, about how children should be raised, what foods are healthy, and much more. We have done this as we have learned more, as we have experienced more, or, as we have thought about what we value and what we do not. We need to take the time to do the same work with our attitudes toward money. We can choose attitudes that make sense and that promote our health and well-being.

Our attitudes toward fundraising are a subset of our larger attitudes toward money. The most important change we can make in our attitudes toward fundraising is to remember that success in fundraising is defined by how many people you ask rather than how much money you raise. This is because some people are going to say no, which has got to be all right with you. The more people you ask, the more yes answers you will eventually get.

Continued on page 15.

BOOK REVIEW



You Can Do It! *A Volunteer's Guide to Raising Money for Your Group in Words and Pictures*

Written and illustrated by Vicki Quatmann

Published by Southern Empowerment Project, Maryville, TN, 2002 (198 pp.)

To order: (865) 984-6500 or www.southernempowerment.org

Reviewed by Helen S. Kim

In these times of funding cutbacks and financial crisis, grassroots fundraising has become more important than ever. Trainings on grassroots fundraising for staff and board leaders take place all over the country. But how to motivate and support a group of board members, member-leaders and volunteers to do grassroots fundraising?

You Can Do It! A Volunteer's Guide to Raising Money for Your Group in Words and Pictures, written and illustrated by Vicki Quatmann, is an important and timely contribution. Combining a training manual and workbook format, with appealing cartoon-like characters carrying the message, the book gives both seasoned and novice fundraisers one of the most accessible and user-friendly tools on the basic principles and techniques of grassroots fundraising.

The author draws upon nearly two decades of experience as a fundraiser for Save Our Cumberland Mountains in Eastern Tennessee and fundraising trainer with the Southern Empowerment Project. She has incorporated many people's ideas and methods into a very practical book, peppered with humor that makes fundraising seem all the more possible and, yes, even fun. Readers of Kim Klein's excellent books on fundraising will find the principles in this book familiar. It's an accessible read for people with little formal education and still useful for those who may already be sophisticated grassroots fundraisers. A Spanish version is also available.

The book is organized into short chapters: the politics of money, the fundraising plan, the question of membership, brochure and flyer design, the ask in person, the ask on the phone, message development, the house party, mail solicitation, special events, and developing your volunteers. Although the mix of content on fundraising and membership recruitment makes for an awkward flow, the reader will find it useful to hone in on the chapters that are relevant to them at different times.

Quatmann begins with an introduction to the social justice underpinnings of grassroots fundraising in the first chapter, "Money, Power, and Oppression." The first step in successful grassroots fundraising — getting over the

fear of asking — requires we understand the power relations in our society about money. The author's use of personal reflections, key words and graphics are especially effective — and memorable — here, as she shows how the "one-up/one-down" model perpetuates oppression. She advocates the "ally" model that makes relationship building in grassroots fundraising much more genuine.

But a caution is in order here. Exercises assume that we are all better off financially than when we were children, while carrying our same attitudes about money. This is not true for everyone. Many communities' economic well-being has declined in recent years of corporate greed and government complicity. Some of the immigrant leaders I've trained have been laid off for many months. While they don't have any money to give to their community, they more than make up with their volunteer time, including asking for money from others.

Bake sales no more, after you've gone through the chapter on "The Fundraising Plan." Quatmann makes a simple yet powerful case — comparing time and money spent and relationships developed, or not, for the future — for the primacy of direct asking and relationship building as the cornerstone of a successful and sustainable fundraising strategy for community groups. Easy to say but hard to do? That's why there are several chapters and many checklists, scripts, and pointers to show how to get the job done.

Quatmann's marketing analysis grid explains the four key aspects of developing a fundraising approach: what we want to do (I/We); what the potential donor may be interested in (You); what we need from you (Need); and what you get in return (Benefit). Step by step, the reader is led to craft fundraising materials and the pitch. It's a simple yet very useful framework to get to the point in any solicitation.

The true value of this book lies in the step-by-step tasks that any willing reader can follow. Worksheets and "What is True" section reinforcements are helpful prodders and reminders that, yes, you can do it. The reader is rewarded over and over again with humorous bubble comments acknowledging their doubts but

nudging them along. Particularly helpful are phone-banking scripts that deal with “no” responses. Humor and good advice make not taking rejections personally much easier. In this, Quatmann’s thoughtfulness, skill, and desire for you to succeed shine through.

References and resources, including websites, would be a helpful inclusion in a future edition for an eager reader looking for more “next step” guides.

There are lots of good training materials and workshops for staff or someone who will become the chief fundraiser for community groups. But few resources

directly address the needs of community members and volunteers. As she was leaving her job and the country, Quatmann wanted to give grassroots members and volunteers something they could reach for over and over again as their guide. We are lucky to receive such a thoughtful parting gift. **GFJ**

HELEN S. KIM, FORMERLY AN ORGANIZER WITH ASIAN IMMIGRANT WOMEN ADVOCATES (AIWA), CONSULTS TO NONPROFIT SOCIAL JUSTICE ORGANIZATIONS ON ORGANIZATIONAL DEVELOPMENT AND STRATEGIC PLANNING. REACH HER AT HELENSKIM@EARTHLINK.NET.

TEN IMPORTANT THINGS... (Continued from page 13.)

Finally, if you are anxious about asking for money or would rather not ask, this is normal. But ask yourself if what you believe in is bigger than what you are anxious about. Keep focused on your commitment to the cause and that will propel you past your doubts, fears, and anxieties.

10. THERE ARE FOUR STEPS TO FUNDRAISING — PLAN, PLAN, PLAN, AND WORK YOUR PLAN

Though humorous, this formula that I learned from a community organizer underscores the fact that fundraising is three parts planning for one part doing. I learned this later in my career, after having gone off half-cocked into many fundraising campaigns and programs. I meant to plan, I planned to make a plan, I just never got around to planning.

I have learned (usually the hard way) that an hour of planning can save five hours of work, leaving much more time both to plan and to work. Planning also avoids that awful feeling of “How can I ever get everything done,” and that sense of impending doom. It moves us out of crisis mentality and means that we are going to be a lot easier for our co-workers to get along with.

There are a lot of articles and books on planning — I recommend reading some of them. However, the easiest way I have found to plan something is to start by defining

the end result you want and when you want it to happen, then work backwards from that point to the present. For example, if you want your organization to have 100 new members by the end of next year and you are going to use house parties as your primary acquisition strategy, you will need to schedule five to seven house parties that will recruit 10 to 15 members per party.

To set up one house party will require asking three people to host it (only one will accept), which will require identifying 15 or 20 possible hosts to carry out the number of house parties you want to have. The hosts will want to see materials and know what help they will have from you.

The materials will have to be ready before the first phone call is made to the first potential host, and the first phone call needs to occur at least two months before the first party. So, the materials need to be produced in the next two weeks, hosts identified in a similar timeframe, calls made over a period of two or three months, and so on.

When you are tempted to skip planning, or to postpone planning until you “have some time,” or to fly by the seat of your pants, just remember the Buddhist saying, “We have so little time, we must proceed very slowly.” **GFJ**

KIM KLEIN IS PUBLISHER OF THE *GRASSROOTS FUNDRAISING JOURNAL*.

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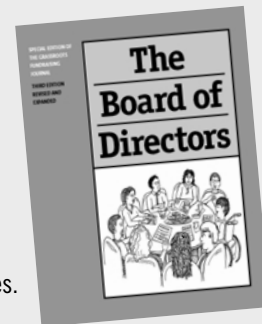
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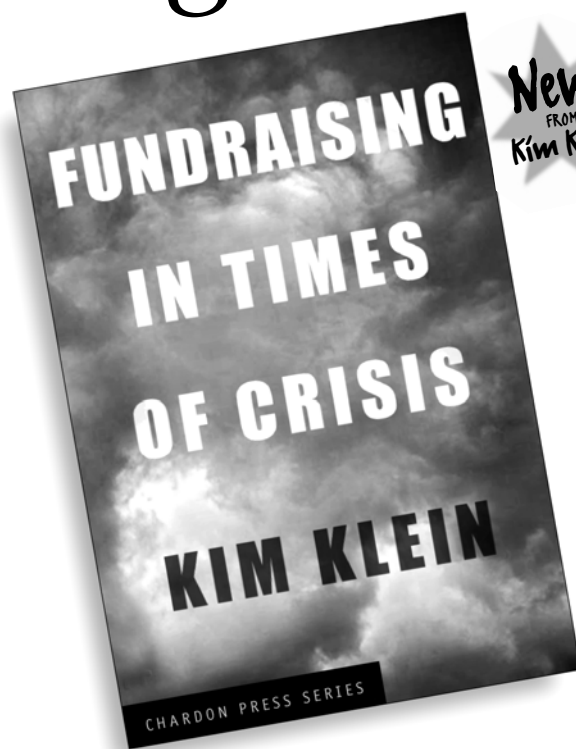
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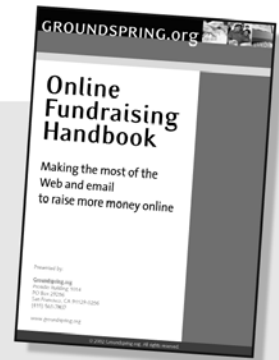
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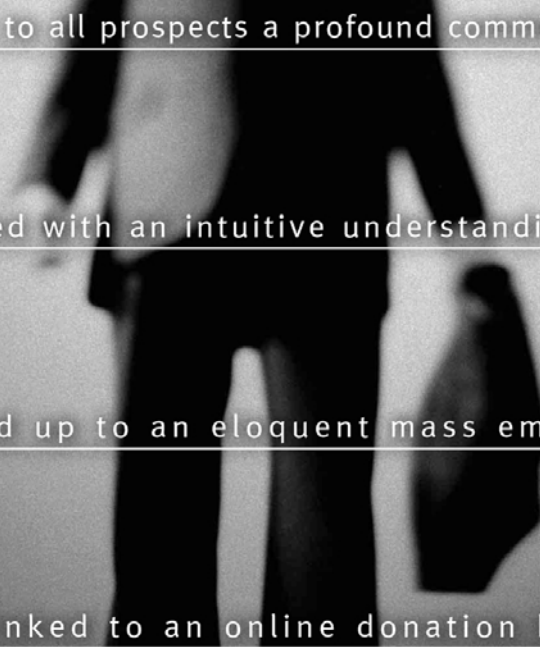
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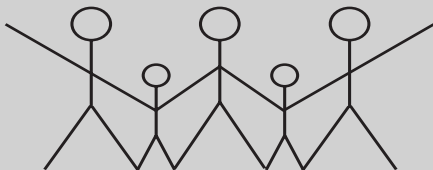


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