

# Contents

VOLUME 26 / NUMBER 5 ■ SEPTEMBER/OCTOBER 2007

## Calling for Dollars: How We Raise Money from an Annual Phonathon

4

*Doreen Der-McLeod*

Cameron House is a multi-service organization in Chinatown, San Francisco that has been running a very successful annual phonathon since 1992. Each year they raise more money from this all-volunteer activity than the year before. Doreen Der-McLeod's story will inspire you to give phonathons a try in your organization.

## How to Raise \$50,000 in Six Weeks

7

*Kim Klein*

Short, intensive fundraising campaigns — whether for \$10,000, \$50,000, or more — can bring in needed money while energizing volunteers and exciting donors. Kim Klein tells how.

## Fundraising Planning Worksheet

12

*Stephanie Roth, Mimi Ho, Priscilla Hung*

Does the fall season get you in the mood to “begin anew”? Here's a step-by-step guide to preparing your annual fundraising plan.



*On Our Cover* • OUR COVER FEATURES PHOTOS OF CAMERON HOUSE PROGRAM PARTICIPANTS, INCLUDING ONE OF THEIR ANNUAL PHONATHON TEAMS. OUT OF THREE FUNDRAISING ACTIVITIES THEY CONDUCT EACH YEAR (THE OTHER TWO ARE SPECIAL EVENTS), THE PHONATHON RAISES THE MOST MONEY WITH THE LEAST AMOUNT OF WORK. THIS YEAR THE FUNDRAISING GOAL FOR THEIR PHONATHON IS \$60,000.

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## LETTER FROM THE CO-DIRECTOR

PRISCILLA HUNG



It's that time of year again — back-to-school time for many students, families, and educators. What a perfect moment for a refresher course on what makes this one of the *Journal's* favorite times of year! We spend issue after issue encouraging you to engage in grassroots fundraising for two main reasons: 1) Community ownership of community-based organizations and having the support of a large base of individuals are integral to long-term social change, and 2) Most people give away money — and it's a lot of money. Which leads us to why this is one of our favorite times of year: the Giving USA statistics are out.

Here's what they show: in total, individuals, foundations, and corporations donated \$295 billion in 2006 — \$35 billion more than in 2005. And it's no surprise to us that 76 percent of those dollars continue to be given by individuals. Some of you may be wondering what effect Warren Buffett's gift to the Gates Foundation and other "mega-gifts" have on these statistics. Not much. Such "mega-gifts" only represent 1.3 percent of the total. This is great news for those of us whose main supporters are not wealthy but are people who are willing to stretch their wages to donate to organizations and causes they care about.

Another thing struck me as I looked over the numbers — and this wasn't as gratifying. One of the reasons the amount of money donated keeps increasing is that nonprofit organizations carry increasing burdens to take care of a wide range of needs formerly provided by the government — support for school programs, health care, libraries, and the like. It's worth asking, "Why is the nonprofit sector being required to sustain the public sector?" Government funding of vital services is being cut while the wealthiest one percent of Americans get huge tax cuts — \$56.5 billion in 2006 alone. Not to mention the billions of dollars given to corporations in tax breaks. Less money is going to public services, and those deeply under-funded public services, in turn, are either being privatized by corporations or shouldered by nonprofit organizations and the individuals that support them.

So, what do we do? We can spend all day demanding that the government changes the way it operates, but nothing will change if we don't have power. One way that we gain power is by bringing people together to work toward a common goal and developing the resources needed to achieve that goal. That's exactly what happened in Atlanta this past June: thousands of people who work in a broad range of community and social justice organizations came together for the first United States Social Forum (USSF) to learn, share, build relationships, and take a united stand for social justice. The USSF was a week-long conference filled with dialogue, workshops, marches, rallies, and cultural events, with the goal of building a powerful national movement based on the organized voices and experiences of those from the grassroots most affected by U.S. and global injustices.

As for bringing together resources, we continue to provide practical tips and tools in this issue of the *Journal*. We have a lot of work to do and many of us will have different, sometimes conflicting, reasons and strategies for doing it. As I was reminded at the USSF, this is both the beauty and the barrier of our sector. Let's continue to support each other to bring together people and resources to our much-needed work.

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# CALLING *for* DOLLARS:

*How we raise money from an annual*

# PHONATHON

BY DOREEN DER-MCLEOD

**C**ameron House — a multiservice agency serving Asians in the San Francisco Bay Area since 1874 — raises 11 percent of our \$1.4 million budget through three annual fundraisers: an event in February, the Cameron Carnival in May, and a phonathon in August. Of these three activities, the phonathon without a doubt takes the least amount of volunteer hours to raise the most money. Over 15 years, we have brought in more and more money from our phonathon, beginning with its \$10,000 goal in 1992 and growing to the \$60,000 goal we have for 2007. This article explains how we did it — and how you can, too.

## FOUR KEY ELEMENTS

We've discovered that the following four elements are key to a successful phonathon: a good list of people to call, people to do the calling, sufficient phone lines, and materials to support the effort. If volunteers are willing to use their cell phones, phone lines may not be an issue. Already, you see that this fundraising activity does not have to be costly to implement. Instead of involving a multitude of staff for multiple weeks, as with many special events, a phonathon takes the time of one staff person over just a few weeks to prepare the mailing, organize the calling, train callers, and follow up with pledge reminders.

### Developing a Call List

As with any fundraising event, you start developing your list of people to call with people who know the work of the agency. Our agency provides counseling services, peer group support, and crisis intervention, along with leadership development, education, and advocacy. With such a wide range of activities, we have a fairly sizable list of people involved with the agency. We began our phonathon list with past and present contributors, members of the agency, former board, volunteer or staff members, people on our newsletter list, people who have attended any of our events, and those who have benefited from our services. If for your organization these lists only produce a limited number of names, board members and staff can

share lists of their friends or family who might like to support your mission.

Your list could be as small as the 200 people known to your board and staff members or as large as a few thousand names if you have kept track of everyone who fits into the categories mentioned above.

At our first phonathon, we were fortunate to have a list of 600 people — a combination of supporters and alumni who had come through the programs and had also donated to our agency and whose phone numbers were in our database. Now we work off a list twice that size. Over the years, we added the names of new donors and alumni of our services who reconnected with us through board members, newsletter stories, or attendance at our February Annual Event.

A board member suggested we hold our first phonathon in 1992, with board members making the calls. I was not on staff then, but I've been told that although some board members were reluctant to participate, all were willing to give it a try. I suspect that because the board members knew a lot of the people in the database, they were comfortable with the idea of talking to people they knew.

The initial goal was to raise \$10,000; surprising ourselves, we raised \$17,455 that first year from 208 donors giving an average gift of \$83.92. This may seem like an unusually high response — almost one-third of our list made gifts — but the strong response could be attributed to having a good list made up of people who had already shown that they cared about Cameron House — and to a team of volunteer phoners who believed strongly in the work of the organization.

Over the years, not only has the number of gifts increased, but so has the size of the average gift. Each year we have challenged ourselves to raise \$10,000 more than the year before. When we reached a goal of \$50,000 in 2004, we stayed at — and met — that target for three years. This year, we decided we were ready to raise our sights once again, so we raised our goal to \$60,000 from the phonathon.

## Callers

The next step is to recruit callers for the two evenings during which we conduct the phonathon. We were aware that callers should be people who know our agency and who would be enthusiastic and genuine in speaking about its work. This is a great way to involve board members who may be reluctant to sit on a fundraising committee but who can give an evening to make calls. Our board members took to the phonathon so enthusiastically that it has become part of each board member's commitment to the agency to spend one evening in August making calls (there is no board meeting that month). We also involve staff members, parents in the program, and volunteers in our agency. In the past few years, we've asked some of our summer staff to join in calling parents of children who attended our summer programs.

The number of volunteers needed depends on how many people are on the call list. A reasonable estimate is that each caller can call 30 to 40 people in an evening. They won't talk to this many people — many won't be home, others will conclude the call quickly; at most, about one in three or four will require time to record a pledge.

Some agencies hire firms that do this kind of calling, but if you can recruit those involved with your program, their commitment and connection to the work of your agency comes through much more sincerely — and doesn't increase your expenses.

## Phones and Place to Call

If your agency, like ours, does not have sufficient independent phone lines to handle more than five calls simultaneously, you can ask callers to use their cell phones, if they have them, or you can check with larger nonprofits in your area that would have more phone lines and ask if you can "borrow" their offices for an evening or two.

## Materials

To prepare for the phonathon, we develop the following materials:

- A letter that is sent to all the people we'll be calling asking for their support (see next section, Step 3)
- A pledge form that is included in the letter for donors to send back with their contribution (this form is also available to callers to send to people who agree to give and want to send in a check rather than pay over the phone by credit card)
- Return envelopes that are included with the letters and pledge forms
- A data sheet for each prospect that is given to the callers with relevant information about the people they'll be calling (see next section, Step 2)

## STEPS IN PLANNING THE PHONATHON

With lists, callers, and location of the phonathon settled, the steps for implementing the actual phonathon are relatively simple.

### Step 1: Determine the date(s) and time for calling

We always do two nights of calling so that we can try to reach people on the second night who weren't home the first night. We use 10 to 12 volunteer callers on the first night but only 7 to 9 on the second night, when there are fewer calls to be made.

### Step 2: Generate individual data sheets

We create a separate sheet on every member of the call list, noting key information: Is this person an alumni, a parent, a volunteer or former board member? What is their giving history: how much have they given previously, when did they give it, and was it for the phonathon or in response to another fundraising opportunity? The data sheet also serves as the pledge form, as the bottom portion is torn off and mailed to the prospect after the call (see example, below).

Caller _____ Date _____		Total Gift/Pledge Amount \$ _____	
Comments _____		Frequency: <input type="checkbox"/> Monthly <input type="checkbox"/> Quarterly <input type="checkbox"/> Semi-Ann. <input type="checkbox"/> Annually Amt per installment: _____	
Actions: <input type="checkbox"/> Remove from mailing list <input type="checkbox"/> Add to alternate email mailing list <input type="checkbox"/> Send information re: <input type="checkbox"/> Address change or update <input type="checkbox"/> HOME <input type="checkbox"/> BUSINESS		Payment Method <input type="checkbox"/> Cash <input type="checkbox"/> Check <input type="checkbox"/> US Mail <input type="checkbox"/> Credit Card <input type="checkbox"/> Debit Card <input type="checkbox"/> VISA <input type="checkbox"/> MASTERCARD <input type="checkbox"/> AMEX	
Telephone _____ E-Mail _____		Credit Card # _____ Name on Card _____ Exp. Date _____ <input type="checkbox"/> Company Matches Gift: Company _____	
OFFICE USE ONLY Entered on _____ By _____ Mailed on _____ By _____		No-Gift Made Tonight - Why? <input type="checkbox"/> Best gift writer <input type="checkbox"/> No. exceeded (no amount specified) <input type="checkbox"/> Unemployed <input type="checkbox"/> Declined to give	
		NOT REACHED <input type="checkbox"/> _____ <input type="checkbox"/> _____ Date _____ Time _____ Reason _____ Reasons: not home, call back later, no answer, busy signal, wrong number	
 DONORDRIVE4 A CHRISTIAN CAUSE 300 Sacramento Street • San Francisco, CA 94111 • 415-774-0461 Thank you for your Phonathon pledge of \$ _____ made on _____ Your participation and your support are greatly appreciated. Date _____ Please make checks payable to: DonorDrive4 Christian Cause A gift invoice is enclosed for your convenience. ALL GIFTS ARE THE SOLE PROPERTY AND ACCOMPLISHMENT OF LHM			

Data Sheet

### Step 3: Mail out a letter a month before the phonathon

A month before the phonathon, we mail out a letter informing our list of potential donors that our agency is conducting a phonathon. The letter includes the following information:

- Date(s) and time we will be calling.
- What the money collected will be used for — general support for battered women, scholarships for youth, sports equipment, etc.

- A note that if we receive their pledge or donation by a certain date before the phonathon, their names will be taken off the call list. In the past five years, we have received at least \$12,000 in pledges or donations before the first call is even made.
- With the mailing we include a pledge/donation card and a self-addressed return envelope with “phonathon” stamped or printed on it so that the responses are clearly identified as part of the phonathon drive.

#### Step 4: Plan activities on the phonathon evenings

On the evening of the phonathon, we gather our volunteers for a simple dinner and a training on how to call and talk with donors. We provide a short script for them to use on the phone and we ask callers to personalize it by identifying themselves as board members, volunteer, staff, or parent before asking for a donation. Training sometimes includes role plays to give people a chance a practice, especially for people who haven’t worked on the phonathon before.

Every volunteer is then given a pack of 20 to 30 persons to call with a data sheet for each donor. Callers will check off the data sheet as they call with the appropriate response information: donor was not home, donor pledged X amount, or donor declined to pledge. We tell our callers not to be discouraged if out of 20 or 30 calls, only two to four people decide to donate.

For those who are not home, we instruct callers to leave a brief message that you are sorry you missed them and that someone will be calling the next night. For those also missed on the second evening, callers mark “no answer” on the data sheet and jot a brief note on the pledge form that will be sent, saying “I’m sorry you were not home when we called, but every donation helps. Hope you will consider donating!” We ask callers to sign their name to make it personal.

While callers are telephoning, backroom volunteers are collecting filled-in data sheets, tearing off the pledge detachment part of the sheet, and stuffing them into envelopes, along with the return envelopes, so people will get their pledge reminder or requests within a few days.

#### Step 5: Follow up

To make sure pledges come in, staff follow up on the phonathon evenings with the following actions:

- Send out the pledge forms or the letters to people who weren’t reached during the phonathon.
- Set up a spreadsheet listing donors who have pledged so that we can track payments as they come in and send out reminders to those who pledged but haven’t paid.
- Send thank you letters to donors as soon as we receive their check.

- A month later, we send a reminder to donors who have not yet sent in their pledge.
- Two months later, we send a final reminder. We use this letter to let donors know that we realize their circumstances might have changed; we ask them to let us know if they cannot meet their pledge.

On average, 95 percent of people who pledge gifts during the phonathon complete their pledge commitment. Of course, there are always a few whose circumstances have changed or who simply default on their pledges, and we figure on that when we set our goals.

## COSTS

The actual cost of doing a phonathon can be minimal compared to doing a special event. Basically, costs include producing the letters, pledge cards, and envelopes (whether we print them off our own computers or send them out for printing we still account for the cost), sending out the mailing to donors announcing the phonathon, sending reminders to those who pledge, and sending a thank you note to each donor. The other cost is feeding volunteers for the two nights of calling and any phone charges we might incur. Finally, there is the cost of the staff time spent on organizing and following up.

Initially, I thought doing a phonathon was like going back to the well to ask the same people who had already supported us for additional gifts. However, over the years, I see that people choose how they want to give. Some will attend an event, others send in donations unsolicited, and some will give in response to every opportunity we give them. People we do not reach by phone will often send in a donation even though they have not made a pledge to the phonathon. The pledge reminder to those not reached by telephone pays off in additional funds collected over and above the pledges committed through the phonathon.

If you decide to try a phonathon like the one described here, you may not meet your goal the first year. But if you do a phonathon year after year, you will be amazed at how people will respond and raise their level of giving each year as their circumstances permit. **GF**

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DOREEN DER-MCLEOD, EXECUTIVE DIRECTOR OF CAMERON HOUSE, IS A SOCIAL WORKER WHO, LIKE MANY OTHER STAFF, WAS A FORMER YOUTH PARTICIPANT AT CAMERON HOUSE.

*For more detail on how to plan and conduct phonathons, you can download the Grassroots Fundraising Journal article, “How to Run a Successful Volunteer Phonebank,” by Dennis Quirin, from the Archives at [www.GrassrootsFundraising.org](http://www.GrassrootsFundraising.org). You can also find detailed instructions for doing a phonathon in *The Accidental Fundraiser: A Step-by-Step Guide to Raising Money for Your Cause*, by Stephanie Roth and Mimi Ho (Jossey-Bass, 2005).*

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# HOW TO RAISE **\$50,000** IN SIX WEEKS

BY KIM KLEIN

## A STORY OF TWO RELIABLE VOLUNTEERS

### Mary Ellen

Mary Ellen has agreed, somewhat reluctantly, to contact 20 donors who have not given in the past two years to the art museum where she volunteers; she will be asking them to renew their gift. She is given training, a list of frequently asked questions (FAQs), and the names and phone numbers of the donors. Every week she gets an e-mail from the development director reminding her to contact her list. Every so often she takes out the folder and looks at the list of names, then, feeling overwhelmed, puts it away, promising herself she will do it later.

Six weeks into the campaign, the development director calls to see how Mary Ellen is progressing. As she listens to the cheerful and encouraging message, Mary Ellen feels fortunate she was not at home for this call. She gets out the list. She reviews the FAQs, but she has forgotten some of the training and feels nervous and ill prepared. "I should have done this sooner," she thinks, and puts the list away again.

After several weeks, the Chair of the committee calls and asks, "How are you coming with your calls?"

"Oh, I am going to finish this week" Mary Ellen says, hoping he will not ask too much more.

"That's good. How much have you raised so far?" he asks.

"I'm not sure — I don't have the list right here."

"That's OK — just let the office know when you are finished," he concludes and hangs up.

Feeling she has practically dodged a bullet, Mary Ellen begins her calls. Ten people aren't home. Two people don't remember the letter that had been sent out two months ago. One person says he hates phone solicitors. Another agrees to renew. After an hour, Mary Ellen stops, planning to finish the following day. But the next two days are full of unexpected guests and she never finishes her calls.

When the chair of the campaign reviews the results with the development director, they agree that Mary Ellen is not as reliable as she seems.

### José

José is on the board of the local Friends of the Library. Somewhat reluctantly, he agrees to phone three donors each week for the next six weeks. He is given three names on Monday that he is to have called by Friday and is instructed to ask each of them to increase their gift by 50 percent. He stares at the three names on Monday and Tuesday. Wednesday he gets a call from the development director. "This has to be done by Friday to stay on track," she reminds him. Thursday morning he gets a text message from the chair of the campaign: "Don't 4get 2 make yr calls." He gets out the list, starts at the top and is done in fifteen minutes. One gift, one not home, one disconnected number. "That wasn't so hard," he thinks, and calls the office to get three more names.

## USING URGENCY TO YOUR ADVANTAGE

I believe that all of us are like both Mary Ellen and José. The longer we have to do something, the longer we will take to do it. The bigger the task, the more overwhelmed we will feel, and many of us will then put it off. In fundraising, we take this aspect of human nature into account by creating goals and timelines and challenge grants and year-end appeals.

One strategy that many organizations can experiment with is the one that worked with José in our story: raising a large amount of money in a very short time frame. This kind of intensive short-term campaign allows an organization to bring people in who are not going to volunteer year round or who may not be appropriate as board members, but who will participate in a time-limited effort.

Competitive people love these campaigns — they are like a game in which a number of things have to be done in order to win. People compete with each other to bring in the most money, and they compete to complete the goal. People who hate fundraising (can you think of anyone like that?) love a campaign like this because they know it is going to be over soon. All they have to do is work hard for six weeks and then they are done, and they do not have to agree to do any other fundraising for the rest of the year.

## WHY SIX WEEKS?

There is no absolute magic about six weeks. However, having experimented with campaigns of many different lengths, I have found six weeks to be about as long as a group of volunteers can sustain an intensive fundraising push. Eight weeks is psychologically a lot longer (two months sounds a lot longer than six weeks). Four weeks is a little too short to get the job done, and it does not allow any leeway for when something may go wrong. Even in two- and three-year campaigns, we notice that, with many exceptions, volunteers tend to work hard for short spurts, then drop back, then come back and work hard again for a time.

## WHY \$50,000?

It's good to choose a nice, round number that sets a reachable goal. In fact, you can use this campaign format to raise any amount of money, so it's important not to get stuck on \$50,000. If you have never done this kind of thing before, consider setting a lower goal. If you have some really major donors, consider setting a higher goal.

People often ask me, "Can you really raise \$50,000 in six weeks?" Of course. In fact, you can raise \$50,000 in ten minutes if you know the right person! But most organizations that have an established donor base from whom they raise \$50,000 or more every year, and who have some experience with personal solicitation, find that they can ramp up their fundraising to take on this kind of campaign.

## HOW IT WORKS

There are ten steps to this campaign.

### Step 1: Identify a reason to have the campaign and set a goal

These intensive campaigns are perfect for small capital needs: a van, a new heating or air-conditioning system, a renovation to make a bathroom wheelchair-accessible, and so on. Many people have used this strategy to send staff and board to conferences (such as last summer's US Social Forum) or to demonstrations, or they have used it to raise money to redesign a website or launch an organizing campaign.

You can use this strategy as part of an annual fundraising drive with no specific need attached: this is our annual major gifts drive and it lasts for six weeks. However, it often works better to have a specific reason that you need the money in this time frame.

### Step 2: Choose a 10-week time period to conduct the campaign

In all, development staff will need a ten-week period of time; the volunteers will work for six weeks during that time. Staff will need two to three weeks to get everything in place, find and train volunteers, and create materials. After that, the campaign itself is six weeks long, with another week at the end for final follow-up, thank you notes, and evaluation by staff.

### Step 3: Develop materials

You do not need any fancy materials for this kind of campaign. However, you will need the following:

- A one- or two-page description of the campaign need and goal: what it's for, why it's exciting (see sample, next page)
- A template of a letter to be sent to donors (see sample, next page)
- Return envelopes and reply devices (you can create a reply device for this campaign, but you should use your regular return envelopes)
- FAQs for volunteers and any other brief supporting materials that may be helpful to them (newsletters, photos, and so on)

### Step 4: Create a simple gift range chart

Your gift range chart will help you figure out how many prospects you will need and what size gifts you are looking for. Here is an example:

**Goal: \$50,000**

NUMBER OF GIFTS	SIZE	TOTAL
2	\$5,000	\$10,000
4	2,500	10,000
10	1,000	10,000
20	500	10,000
40	250	10,000
<b>76 gifts</b>		<b>\$50,000</b>

You will need about twice as many prospects as the number of gifts you want. To be safe, you will want to identify three or four prospects for each gift of \$1,000 and up because many people will say, "I can't give that much" and will give less. Remember that about half of prospects, when asked personally, will say yes, and half of those agreeing to give something will give you less than what you ask for.

You can create gift range charts for whatever amount you are trying to raise. Here is a gift range chart for an organization wanting to continue providing health insurance to their employees. Their insurance provider has just raised their rates by \$10,000 per year and the organization cannot afford that sudden increase.

**Goal: \$10,000**

NUMBER OF GIFTS	SIZE	TOTAL
1	\$2,000	\$2,000
2	1,000	2,000
4	500	2,000
10	250	2,500
15	100	1,500
<b>32 gifts</b>		<b>\$10,000</b>

This group will need about 65 prospects to complete their goal. Of course, you can also lower the gift amounts (which will mean increasing the number of gifts you need), but in general if you go through the trouble of sending a personalized letter and following up with a phone call, you want to ask for at least \$100.

### **Step 5: Determine the number of volunteers you need and invite them to join this effort**

In these intensive campaigns we usually find that one person can ask three people a week for the six-week period, so each volunteer will ask a total of 18 people.

To figure out how many volunteers you need, take the number of prospects you need (in the first example above, 160 prospects) and divide that by six weeks to get the number of prospects who must be asked each week to keep the campaign on track:

$$\begin{aligned} &160 \text{ prospects} \\ &\text{divided by } 6 \text{ weeks} = \\ &27 \text{ prospects per week} \end{aligned}$$

If one person were to do this alone, he or she would need to contact 27 people a week — a fairly overwhelming task. Using volunteers, and assuming each volunteer can reasonably contact three people per week, divide the number of prospects who must be contacted each week by three to get the number of volunteers you need. In this example, you need nine good, reliable volunteers to form your committee.

Who are these volunteers? Some of these people are the usual suspects: a few board members, former staff, people who always help you. But this is also a chance to bring in other people, such as vendors, neighbors, long-time donors, former clients, people who have said to you, “If you ever need help, let me know.” This is a brief and relatively easy way for people like that to help out your organization.

The volunteers must make their own gift first, both to demonstrate their commitment and to make it easier for them to ask others to do what they have done. An added bonus is that when you start your six weeks, you already have some gifts — often some of the bigger ones. The solicitors must care about your cause, be friendly and warm, comfortable asking for

## Sample Campaign

### THE NEED AND THE GOAL

Since 1980, Greenforks Respite Center’s mission has been two-fold: it provides a crucial break, support, and education for people caring for a loved one who is impaired due to Alzheimer’s, Parkinson’s disease, stroke, and related disorders; and it creates opportunities for those challenged by living with disease to enjoy a higher quality of life.

Greenforks Respite Center strives to enable adult day program participants to lead full lives, allowing them to make their own choices while enjoying dignity and respect in their daily lives. Program participants are encouraged to reach their maximum level of individual potential, independence, and self-esteem. The program provides socialization and recreation in a safe and compassionate environment.

To enhance the lives of our program participants, we want to create an outdoor garden where they can wander safely on their own. We have a space about the size of half a football field that we wish to enclose with a ten-foot-high solid wooden fence, landscape simply with benches, a few picnic tables and chairs, and beautify with grass and flowers. We have people who will donate the labor to create this enclosed garden space, and materials are being sold to us at cost. We must raise \$50,000 to purchase the needed materials and complete the project. Our goal is to raise this money by the end of February so that we can finish all the work in March and open the space in late April.

### SAMPLE LETTER

Dear \_\_\_\_\_,

*As a long-time donor/volunteer with Greenforks Respite Center, you know the quality of our work. I hope you also know that we couldn’t do any of it without you.*

*Greenforks grew out of the grassroots effort of a small group of people in need of day care for their spouses or parents who were suffering from Alzheimer’s disease or debilitated from the effects of Parkinson’s disease, a stroke, or other conditions. We started out as a program that met one day a week; now we are a full-service, state-licensed, adult day program that operates Monday through Friday in two four-hour shifts. We offer a dementia caregiver support group twice weekly (average weekly attendance: 23) and ongoing information, support, and referral services.*

*You may know that one element our program lacks is the chance for our participants to be out-of-doors on their own. A few years ago, we purchased the vacant lot behind our building and we now have permission to enclose it with a wooden fence and make it into a wonderful small, park-like space where participants can wander without any danger of getting lost or hurt.*

*Youth groups from three churches and a synagogue are donating labor under the skilled direction of a master carpenter and a landscape architect. Our local hardware store has arranged for us to buy everything we need at cost. So a project that could easily have cost \$120,000 can be done for less than half that — only \$50,000!*

*Our goal is to raise this money in the next six weeks so we can have the space ready to use by early spring. I am working with a small team of people to meet this goal. We have each made our own gift and pledged to raise another \$5,000. I am hoping you can help with a gift in the range of \$500 to \$1,000, and I’d like to talk with you more about this project. I know you have many requests and I want to answer any questions you have about ours. I’ll call you in the next few days to follow up.*

*Thanks in advance for every consideration.*

Best always,  
YOUR NAME



money on the phone, persistent in doing follow-up, and able to work on a team.

There are people who meet all these criteria except the last one — ability to work on a team. These people should be used in some aspect of fundraising, but not in this kind of campaign. You don't want someone running into a colleague and deciding then and there to ask them for money without regard to the fact that this colleague has already been asked by someone else.

### Step 6: Invite volunteers to a meeting to create the master prospect list

When doing this campaign — as with any campaign — it is important that you ask *prospects* and not just nice people or people with money or people you know. All of those qualities might be part of what makes a person a prospect, but your campaign will sputter to a quick stop if you are not careful about identifying your prospects.

A prospect is someone who meets three criteria:

A) They are *able* to make a gift of the size you are requesting.

B) They *believe* on your cause enough that you think they might consider the gift you are requesting, assuming they meet criteria A.

C) You or someone on your team is able to *contact* this person. Although they may be a stranger to you, they are a friend or colleague of someone on your team or they are a long-time donor to your organization. There is no “cold calling” involved here.

At your meeting, brainstorm names of prospects. You should bring in the names of anyone who has given for the past three years. That list will get volunteers started. Don't criticize any names at first. Just write them down on a flip chart or a blackboard. Let the volunteers say “Bono” and “Leonardo diCaprio” if they want. Some volunteers may have names of friends and relatives that they don't want to have recorded in this public way — that's fine. Just make sure you get *all* the names of people to be solicited before any solicitation takes place to ensure that no one is solicited twice and to make sure you have enough prospects.

After brainstorming, go through each name and confirm that person meets the criteria to be a prospect. Many names will be eliminated because no one knows them. Some eager volunteers will want to write to Paul Newman or Bill Gates anyway. “It can't hurt,” they argue. True, and they are welcome to do that. However, those names can't count toward their assignment of three names a week.

Be careful that when you discuss whether someone believes in your cause you don't fall back on the idea that “Everyone believes in our cause.” There are many causes that someone might feel fine about and might even hope succeed, but they don't care enough about that particular issue to make a gift. Most of your qualified prospects will

either be current donors to the organization who are going to be asked for an extra gift, or they will be friends of the volunteers on the committee.

After this meeting is over, create a master prospect list against your gift range chart, as follows:

**Goal: \$50,000**

NUMBER OF GIFTS	SIZE	TOTAL	NAMES
2	\$5000	\$10,000	1) Bill 2) Mary 3) Arnoldo 4) Tiffany
4	2,500	10,000	1) Emiko 2) Hillary 3) Frances 4) Helen 5) Nancy 6) Raj 7) Sunny 8) Jaden
10	1,000	10,000	etc.
20	500	10,000	
40	250	10,000	
<b>76 gifts</b>		<b>\$50,000</b>	

You do not need all your prospects right now, but you will need prospects for the bigger gifts in order to give your campaign momentum and to ensure success. In this example, if all your prospects were at the \$250 level, it is unlikely that you would make your goal.

### Step 7: Invite the volunteers to a meeting where the campaign is launched

Technically, the launch meeting can occur at the same meeting at which the committee brainstorms prospect names. If your volunteers are coming from a distance you may want to do both the prospect identification and the launch at the same time.

When moving into the launch, go over the message and the materials for the campaign in detail. Have people practice follow-up phone calls and dealing with difficult or rude prospects. Remind volunteers that a lot of people are going to say no. Here are some things that volunteers should keep in mind about hearing no for an answer:

- **Some people may say, “I have to think about it”** or “I have to ask my husband,” and that may be what they have to do. Don't hear no when the person hasn't said no. However, sometimes people say things like that and they mean no.

- **When someone says no**, just remember that you are that much closer to a yes with the next person (because half overall will say yes).

- **Don't take it personally** when someone says no — it has nothing to do with you. Some people dislike being called; most people have a lot on their minds and sometimes can't pay attention to any other requests; some people have already given what they are going to give this year; some people may not be that thrilled with how you are going to use the money or may think some other cause is more pressing. Just thank them and move on.

The idea of this kind of campaign is that it is fast: the request is “Can you help with this much at this time?” In this strategy there is not a lot of cultivation or giving the donor lots of time to think about their response.

Send out the first round of letters either right before or immediately after the launch meeting. Give people their first three names. Ideally, the meeting is held on a Friday or a Monday and each volunteer has one week to complete asking the people whose names they received.

It is tempting to give each person all of their names at once and to send out all the letters at once. It is more efficient and if they can't reach the first three, they can go on to the next three. The problem with this approach, as we saw in the opening story, is that people feel overwhelmed with more than three names and they also assume they have time to get their calling done “later”—after all, they have six weeks. We all know how we think that the week after next week is going to be better than this week.

So although it seems more efficient to give out the names all at once, it is more effective to give out three names at a time to follow up on three letters. This means some weeks will be easy (everyone is available when they are called and they all make a gift) and some weeks will be hard (it will take four tries to reach one person, another person will be rude and dismissive, and a volunteer will talk for 45 minutes to the third person only to have them tell you how sorry they are that they can't help you).

#### **Step 8: Keep in close touch with the volunteers**

Each week the people on the committee get three more names. Daily e-mails let the team know how well they are doing. Post something about the campaign on your website and have a visual there that shows how close you are to your goal. If anyone falls behind, they should be called by the chair of the committee and encouraged.

#### **Step 9: Around the fourth week, rally the team**

Often all goes well until about the fourth week of the campaign. Volunteers then begin to flag. The easiest prospects have been asked and the biggest gifts are usually in. Now it will take a lot of \$100 gifts to get to the goal.

Have a meeting in the fourth week and rally the team for the final push. Go over the prospect list again and make sure you have enough prospects to finish the campaign. Volunteers will have thought of new people as they go along and you can add in those names.

#### **Step 10: At the end of the sixth week, close the campaign**

Regardless of how much money you've raised, once volunteers have worked on the campaign for six weeks, consider it over. Have a party. It would be great if you have met your goal, but even if you haven't, celebrate what you have done and see what you have learned and what you would do differently the next time.

This kind of campaign appeals to a certain kind of person, both as a volunteer and a donor. It is not a substitute for cultivation and for building deeper relationships with donors, but it is a fun and lucrative way to get a good chunk of money in quickly.

A campaign such as this is a good way to bring back lapsed donors, sometimes to upgrade current major donors, to seek extra gifts for something not in the budget, and to expand your donor base to the friends and colleagues of the team that is working on the campaign. Many organizations have found that they develop a core group of people who volunteer every year for this short campaign, which over the long term can reliably boost your overall fundraising. **GFJ**

KIM KLEIN IS PUBLISHER EMERITUS OF THE *GRASSROOTS FUNDRAISING JOURNAL* AND A FUNDRAISING CONSULTANT AND TRAINER. REACH HER AT [KIM@KLEINANDROTH.COM](mailto:kim@kleinandroth.com)

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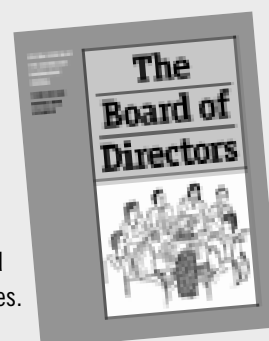
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# Fundraising Planning Worksheet

## *A Tool for Creating Your Annual Fundraising Plan*

BY STEPHANIE ROTH, MIMI HO AND PRISCILLA HUNG

**A**lthough fall isn't the start of most organization's fiscal years, perhaps as a remnant of our school-year schedules, it is a time when many of us gear up after summer holidays — often with renewed energy — for the busy fall fundraising season. One task facing those of us with fiscal years beginning on January 1st is the preparation of our annual fundraising plan.

This article presents a systematic way of creating an annual fundraising plan for your organization. The focus of this process (like the focus of the *Grassroots Fundraising Journal*) is on strategies for building a base of individual donors in order to create a reliable and repeatable source of income.

The six-step planning process this worksheet takes you through will help you create a plan that is based on the realities of your organization's funding base, infrastructure, and fundraising team. We recommend you include both board and staff in creating your plans, along with anyone else who is key to implementing the plan. When the people who are expected to carry out the

fundraising activities have participated in developing the plan, their commitment to it will be greater, boosting your chance of fundraising success.

Before calling together everyone you want to involve in creating the details, however, go through the steps here and gather whatever preliminary information will be needed to complete the plan. Then schedule a meeting of all the people who will be key to carrying it out, sending them a copy of the following worksheet pages with the information you have gathered.

You'll see that Step 1 assumes you've already developed your budget for the coming year, or at least a draft that will be completed once you've figured out exactly how much money you can realistically raise.

It takes some time to think through a fundraising plan in this amount of detail, but once you've done this planning, all your fundraising tasks are clear and ready to be implemented. **GFJ**

---

PRISCILLA HUNG & STEPHANIE ROTH ARE CO-DIRECTORS OF GIFT. MIMI HO IS PROGRAM DIRECTOR OF THE ASIAN PACIFIC ENVIRONMENTAL NETWORK.

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### STEP 1: GATHER THE NUMBERS

A. What are your projected total expenses for the coming year? . . . . . \$ \_\_\_\_\_

B. How much income, in total, is already committed toward your expenses? (Include only support that is already promised — individual donor pledges that have been made as well as government, corporate, or foundation grants that you are assured of) . . . . . \$ \_\_\_\_\_

C. Subtract "B" from "A" for total amount to be raised: . . . . . \$ \_\_\_\_\_

D. Fill out the following chart with your results from last year's fundraising activities, your current year-to-date figures, and projections for the coming year. There will likely be some parts of the chart that you'll leave blank at this stage in your planning process until you've completed more of this worksheet and can come back to them. The "sources" listed are examples only. Add ones that are relevant to your organization, such as house parties, online appeals, and so on. In the "expense" column for each activity, include in the cost of raising the money not only materials and other expenses but also staff time if possible.

**Fundraising activities, current year-to-date figures, and projections for the coming year:**

<b>SOURCE</b>	<b>LAST YEAR'S INCOME</b>	<b>LAST YEAR'S EXPENSE</b>	<b>CURRENT YEAR'S INCOME</b>	<b>CURRENT YEAR'S EXPENSE</b>	<b>NEXT YEAR'S INCOME</b>	<b>NEXT YEAR'S EXPENSE</b>
<b>Individual donors</b>						
<b>Total</b>						
• Membership dues						
• Events						
• Major Gifts						
• Mail solicitation						
• Other:						
<b>Sales/earned income</b>						
<b>Other sources:</b>						
• Government						
• Foundations						
• Corporations						
<b>TOTALS</b>						

## STEP 2: ANALYZE PAST FUNDRAISING EFFORTS

(Use separate sheets of paper for the following questions for each source.)

- For each of the sources of income in the chart in Step 1, note briefly what has worked well to bring in money that you want to do again.
- What hasn't worked? How can you improve or modify these strategies to make them work?
- What are new opportunities coming up that you want to take advantage of, such as a special anniversary, a large organizing campaign, a new executive director?

(If you want to do a more detailed evaluation of your past fundraising efforts, including rate of response, what worked, and what should change, see "Evaluating Your Individual Donor Program" by Stephanie Roth in *Grassroots Fundraising Journal*, Vol. 20 #6, (Nov-Dec 2001), available at [www.grassrootsfundraising.org](http://www.grassrootsfundraising.org).)

## STEP 3: DETERMINE YOUR AVAILABLE RESOURCES

Resources for fundraising include the people who will be involved in carrying out various fundraising tasks as well as money you'll need to spend on staff time and materials. The expenses were included in Step 1. The following chart will help you brainstorm who you can recruit to your fundraising team.

<b>WHO?</b>	<b>HOW MANY?</b>	<b>WHAT COULD THEY DO?</b>
Board members		
Staff (including program staff)		
Volunteers (including former board and staff, members, supporters)		
Who else?		

If your organization's budget-setting process has identified how much you plan to spend on fundraising, put that amount here as another resource you have available:

\$ \_\_\_\_\_

## STEP 4: STRATEGIES — WHAT WILL YOU DO?

Now think about the fundraising strategies you'll use to build support from individual donors — and in some cases, from small businesses or corporations — from the point of view of getting new donors, renewing current donors, and upgrading current donors.

**Acquire new donors** — List all the activities you will engage in to bring in new donors, such as direct mail appeals, e-mail outreach, house parties and other events, and individual donor asks:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

**Renew current donors** — List the activities you'll engage in to ask your current supporters to give again. Typically, these include mail appeals, e-mail solicitations, and follow-up phone calls. They also include personal solicitation for larger gifts. Special events are also activities that donors often come to year after year.

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

**Upgrade current donors** — Getting donors to consider larger gifts usually requires a more personal approach. The size of a major gift depends on your donor base. For a group with few or no donors, a major gift might be \$100. For a group with several hundred donors or more who give varying amounts, \$250, \$500, or even \$1,000 may be the threshold for a major gift.

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

## STEP 5: HAMMER OUT THE DETAILS

For each fundraising strategy that you plan to use, fill out a separate page with the following information:

**Strategy:** \_\_\_\_\_

Projected income (gross):           \$ \_\_\_\_\_  
 Total cost (use worksheet below):   \$ \_\_\_\_\_  
 Net income:                               \$ \_\_\_\_\_

Other goals that this strategy will meet (such as get new donors, generate publicity, involve board members in fundraising): \_\_\_\_\_

Number of staff and volunteers needed to carry out this strategy: \_\_\_\_\_

### Expenses to complete this strategy:

EXPENSE	\$ AMOUNT	NOTES
Staff time		
Consultant/ Services		
Design		
Printing		
Postage		
Travel /Transportation		
Food		
Other:		
Other:		
<b>TOTAL</b>		

**Activities / Steps to complete this strategy:**

DATE	TASK(S)	WHO

## STEP 6: PUT IT ALL TOGETHER

Finally, you can pull together all your fundraising planning in one chart that will show what fundraising activities you are doing, how much you intend to raise, from whom, when, who will do what, and how much it will cost. The following worksheet starts with a couple of sample activities to give you an idea of how to fill it out.

STRATEGY	GOALS (dollar amount and response)	TARGET AUDIENCE	DESCRIPTION	WHEN	WHO	COST	
House Parties (total of 3)	\$3,000 45 new donors	Friends and family of board members	Small events in homes of board members (or other supporters)	March, May, October	<b>Staff:</b> Help recruit hosts, help create invitations, thank yous, logistical support <b>Board:</b> Host part, invite own contacts, provide refreshments	\$200 per party	
Major Gift Campaign	\$20,000	Current donors, \$100 & up	Personal solicitation: phone or in-person	October 15 – November 30	<b>Staff:</b> Prepare materials, identify prospects, draft letter, conduct solicitations <b>Board &amp; other volunteers:</b> Identify prospects, conduct solicitations	<i>Minimal:</i> some postage and meeting costs	
<b>TOTAL INCOME:</b>	<b>\$</b>					<b>TOTAL EXPENSES:</b>	<b>\$</b>



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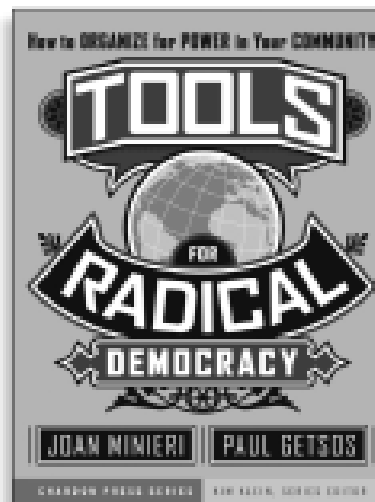
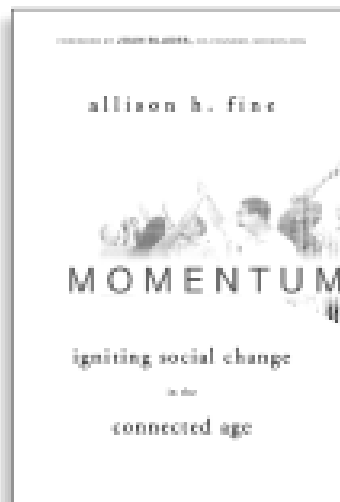
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