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LETTER FROM THE EDITOR

STEPHANIE ROTH



I'm writing this column in a warm, fuzzy glow, after spending two days at the end of July in San Francisco with over 650 fabulous fundraisers, activists and organizers at our second bi-annual "Raising Change: A Social Justice Fundraising Conference." People came from 37 states, South Korea, and Mexico; half of the participants were under 35 and 60 percent were people of color. In addition to 40 workshops, 50 one-on-one sessions with seasoned fundraisers, and more than 25 peer-led informal discussions, the conference included inspiring and thoughtful keynote talks by Katherine Acey (Astraea Lesbian Foundation for Justice) and Robby Rodriguez (Southwest Organizing Project), and a dynamic debate on whether the nonprofit sector contributes to or undermines our goals of social justice. We were moved and inspired by excitement and enthusiasm present throughout the two days of this sold-out event. Over the next couple of months, we'll be posting excerpts from the keynote speeches, handouts from the workshops, and a video of the debate on our website www.grassrootsfundraising.org.

Giving USA's annual report on charitable giving came out this summer, and here are a couple of statistics that remind us of why it is important to keep our fundraising focus on building a base of individual donors. (For more, go to www.givingusa.org):

- Total giving to nonprofits from individuals, foundations, and corporations increased 3.9 percent from 2006, to an estimated \$306.39 billion in 2007.
- As has been true for the past 53 years that giving has been tracked, individual contributions made up the lion's share of gifts. Living individuals contributed \$229 billion, or 75 percent of the total; adding in bequests, individuals account for \$253 billion, or 82 percent of all gifts.

Many of us are concerned that the current economic situation – with the sub-prime mortgage crisis, skyrocketing gas and food prices, and hundreds of billions of dollars of government spending on war – will make our ability to raise money for our organizations more challenging than ever. Although there is cause for concern, along with the reality that some nonprofits can't afford any decline in income, there is also reason for optimism. According to the Giving USA Foundation, although giving did decrease during the five recessions since 1975, it only fell an average of 1.3 percent (adjusted for inflation). We've seen time and again that in difficult financial times, people do whatever they can to continue supporting causes they care about.

Another concern of nonprofits is whether presidential campaign fundraising will have an impact on their income this year. In 2007, presidential campaign giving totaled \$580.4 million, which, though a sizable sum, is *less than one-quarter of one percent* of the total given to nonprofits. Although giving to candidates will certainly increase in 2008, it is not expected to have much of an impact on the overall amount given to nonprofits.

This year's exciting Democratic presidential primary contest has inspired us to publish an article on electoral organizing and how nonprofits can effectively (and legally) engage in this work. Longtime community organizer Paul Getsos provides a thorough description of what to consider about getting involved in electoral organizing along with tips on how to fundraise for such work.

As we enter what for most of us will be a busy fall fundraising season, I hope we can all keep in mind the Buddhist saying, "We have so little time, we must proceed very slowly."

THE POWER OF THE VOTE:

Expanding Your Influence, Effectiveness,
and Power in the Advocacy Arena
Through Electoral Organizing

BY PAUL GETSOS

With energy and interest in the 2008 election running high, many community organizations are thinking of whether and how to get involved. A successful voter project could increase your organization's capacity and political influence, engage your members, clients, board, and staff in an important part of civic life, and bring in additional dollars. Clarity on goals, good planning, and a strong fundraising plan are key.

This article explains what electoral organizing is, why an organization that does community organizing, advocacy, or direct service might want to consider engaging in electoral work, and what's different in raising money for this kind of work.

TYPES OF ELECTORAL ORGANIZING

One or more of the following electoral programs might be appropriate for your organization:

- Registering members and then reminding them to vote
- Educating members about candidates' positions
- Increasing voter turnout by geographic area or issue area

All of these programs can be nonpartisan — that is, the organization takes no position on a candidate or issue, which keeps them within their 501(c)(3) restrictions. Groups also have the opportunity to engage in partisan work through developing a 501(c)(4) Political Action Committee (PAC). (For more information about acceptable activities within nonprofit law, see AllianceforJustice.com, or consult a lawyer who has expertise in not-for-profit law and regulations.)

Although many groups begin to think about developing voting and electoral programs during the big races for President or governor, local races for state legislature, city council, and various community boards give groups engaged in electoral programs the chance to have a major

impact. Not only can mobilizing manageable numbers of voters (500–1,000) have an effect on these races, but many of these elected offices have power over the issues that many organizations work on. Local officials are making critical decisions about public benefits, local zoning ordinances, economic development projects, and program budgets. A group that has implemented an electoral program that these officials are aware of can bring their influence to bear in holding the politicians accountable to community needs.

WHAT IS ELECTORAL ORGANIZING?

Electoral Organizing is work that engages registered and eligible voters in an activity that results in increased participation in an election. The goals of this kind of work can be to increase the numbers of people who vote, to change the outcomes of the election, to increase the power and influence of a particular community or issue group, or to add an additional strategy to your organization's power to win on its issues.

Although it can be an end in itself, electoral organizing is most powerful when it complements and builds on your core policy, program, and community organizing work.

Engaging in Voter Work versus Developing an Electoral Strategy

Electoral organizing can range from a one-time voter registration drive connected to an issue campaign to a multi-year program that helps to build an organization's political power.

Examples of short-term opportunities include an open seat for an elected office that could affect local or regional politics or a ballot initiative that could have either a negative or positive effect on an organization and its constituencies.

Organizations that choose to build a long-term electoral program generally do so after a strategic planning process and evaluation of what is necessary to shift power in a community, including what opportunities exist for collaboration and resources for the work.

Electoral Organizing Activities

Voter work is simply engaging voters or potential voters in some kind of activity with your organization. These are the most common activities:

- **Voter registration:** Getting people to fill out the paperwork to be able to vote in an election. A voter registration campaign can either focus only on increasing the number of people registered to vote or include components that educate and mobilize these new potential voters. Voter registration projects are generally aimed at new voters (newly naturalized citizens, youth, and students) and communities with historically low voter turnout rates (such as low-income people, workers, homeless people).

- **Voter education:** Educating a group of voters about one or more of the following: an upcoming election, major campaign or ballot issues, the positions of candidates, and the voting and political system. Activities can include town hall meetings, voter guides, candidate forums, and one-on-one contact.

- **Voter identification:** Identifying a certain group of voters that an organization would like to turn out during an election. Whether you are doing a nonpartisan project or endorsing a candidate or a position on a ballot initiative will determine how you can engage in voter ID. By turning voters out for an election, an organization can show potential policy makers that they have a base of people in the community they can move, particularly around specific issues.

- **Voter mobilization:** Getting people to the polls. Get-out-the-vote activities range from sending a reminder mailing or email to the people you have in your database to carrying out an intensive, multi-contact voter mobilization program. Nonpartisan voter mobilization messages focus on the importance of civic engagement, participation, and involvement, not on a specific candidate or ballot proposition.

Any of these activities can be done alone; however, they make the biggest impact if you combine a number of them in an integrated program connected to your ongoing work and program.

Other Types of Electoral Work

In addition to activities that engage voters, the broader scope of electoral work can include candidate education and candidate development. Educating candidates about

an issue and how your group thinks it should be addressed can be done through media, policy advocacy, public education, and direct action such as accountability sessions or target meetings with the candidate.

Candidate development is the process of identifying people in your organization, community, or networks who would make good elected officials, training them to be strong candidates, and helping them to run effective campaigns.

GETTING STARTED: PLANNING YOUR PROJECT

When you begin to explore the idea of doing electoral work, your organization should engage in some evaluation, assessment, political analysis, and planning to develop the best program possible. Particularly important is evaluating what issues are on the table and

whether other groups are also working on the election around those issues. Make sure you check in with other groups and stakeholders to coordinate your activities.

Talk to a variety of people in the political world — such as the political director at unions, friendly elected officials, political donors, and independent consultants — to find out what could have the largest impact and raise the profile of your organization, particularly with elected officials. This process can help you understand the opportunity available to create a program that has some value, while starting to build relationships and get buy-in from people you may want to return to as you engage in your fundraising.

When the assessment and planning process is complete, having a strong plan will help you communicate what you want to do effectively to people inside and outside of your organization from whom you want support for the program. It will also help you with raising funds for the work.

There are seven key steps to planning your electoral project:

1. Clarify your goals.
2. Determine whether your program will be nonpartisan — within your (c)(3) — or partisan — as part of a (c)(4) PAC.
3. Assess your organization's current resources and what you need.
4. Articulate how engaging in this work builds your organization and helps to fulfill your mission.
5. Develop a written plan.
6. Develop a budget.
7. Develop a fundraising plan.

ELECTORAL
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DRIVE CONNECTED TO
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HELPS TO BUILD
AN ORGANIZATION'S
POLITICAL POWER.

More detail about the first five steps can be found on the website, www.grassrootsfundraising.org. Here we look more closely at the two steps that pertain most directly to fundraising: developing a budget and a fundraising plan.

DEVELOPING A BUDGET

A realistic budget that reflects the needs of an electoral project is critical for fundraising. Donors who either fund voter programs or do their own electoral programs will be less likely to fund a project whose budget is unrealistic or does not accurately reflect the needs of a strong voter project.

Specifically, the budget should reflect the plan and its activities. If you plan to target voters using an analysis, specific databases, and technical expertise to manage these databases, the budget should reflect these costs. If you want to evaluate voter participation rates in a district, make sure you budget for that. Technology and the acquisition of voter lists are always critical budget items as well.

Even if you believe some items will be donated or you will receive in-kind services, estimate a cost for them and put them in your budget. People sometimes promise things that at the last minute they cannot deliver. If volunteer time or in-kind services and donations fail to materialize at the right time, you may need to pay for these in order to go on with your work. For example, the failure to create a targeted list of voters at the appropriate time can end a project before it starts or at best severely affect its outcomes.

Once you have created a budget for these core expenses, including the cost of a Project Manager or Director, then the rest of the budget will be based on how many voters you want to contact, how many times you will contact them, how you contact them, and what you ask them to do. Cost items will be based on estimating how many contacts each organizer will make a week so you can estimate how many organizers you will need to make your goals. Other costs include literature you will produce and mailing costs associated with sending it to voters.

FUNDRAISING FOR AN ELECTORAL PROGRAM

All the work that you do in the first five steps on goals and plans should significantly improve your ability to raise money because you will be able to articulate to your current supporters how this new work, while separate from your core work, also builds your organization. New donors, particularly donors interested in the electoral arena, will see that you have thought about how to do this work effectively and that you want to have an impact.

Following is a brief overview of how to raise money for your electoral program.

Develop a Message and Materials

Working off the plan you created, develop the basics of a pitch to use when communicating to donors. The core elements of the pitch will be the same for all of your donor appeals, but you modify them depending on whether you are talking to current donors or potential donors. The pitch — which can take the form of a fundraising letter, a phone rap for a phone bank, the content of an in-person conversation with a prospective donor, or a more formal proposal to a foundation — should include the following elements:

- The name of the new project and what it is going to do
- Why it is important to do now and the opportunity that your organization wants to take advantage of
- Why you think you can do it and how your track record supports this belief
- How it will build your organization and how it will help you achieve your overall organizational goals
- What you think or hope it will achieve
- How much money you need to raise and for what
- An ask with a specific dollar amount

Different Audiences

It is important to tailor the pitch to the person you are talking to. Smaller contributors do not need an entire political analysis, but they might need to just know why a state senate race is important. Your core

donors may need to understand how a gift to this project is different from their regular contribution. People who have given to your issue area before but not to your organization or to a voting project will need background on both as well as on how this project connects to the issue they care about.

An individual donor with a history of giving large gifts to campaigns and organizations engaged in voter work will need to know that you have done your research and that you understand how information about past elections, turnout rates, and polling could be helpful in moving people to support your work. These donors are more likely to be motivated by hard facts. However, do not forget to include stories that make the work real for people. Having a community person tell how they voted for the first time as a result of the work of your organization is a good way to get donors to understand the work and to potentially move them to give.

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Asking Current Donors

The first people to consider asking are those who support you already. These supporters know your organization and believe in your work. If they are consistent donors, they trust your organization and believe in your capacity and ability to make an impact. With these core supporters, the two challenges you will face are convincing them that the project requires new funds and persuading them to give you additional money for this work.

If your electoral work is going to be a one-time-only project, for example developing a voter program to participate in an open mayoral election or to oppose a conservative ballot initiative, you can make a “special appeal.” In this appeal — written, phone, or in-person — the pitch would focus on the uniqueness of the situation and the impact that your organization could have on the issue by getting involved in this work for a limited time. It should also include a good amount of urgency and clearly lay out the impact that the outcome could have — both good and bad.

For your smaller donors, a letter or email appeal is your best approach. Your message should also include a concrete amount, perhaps with a description of what activity is supported through the donation. For example, “A contribution of \$100 will provide 400 voters with the information they need about the important issues that the next Mayor needs to address so that they can make an informed choice on election day.”

For your major donors, or those donors who you think have the potential to give larger gifts, consider holding a breakfast briefing or morning roundtable. These meetings can appeal to the desire of a medium-to-large donor to be seen as an organizational partner. They also provide an opportunity to do more education.

A briefing should include a presentation about the political landscape, how an electoral program could make a difference, and a description of the programs the organization will run. Be prepared to talk about the resources available and needed and to present the budget. Following a question and answer period, ask attendees to consider making a gift to the project. It’s ideal if a donor who has agreed to make a contribution prior to the meeting can make the ask.

This type of gathering can generate an atmosphere of excitement that provides people with an incentive to give, and it can move some people to give because they see the public commitments of others. These meetings also allow you to reach a larger number of donors at one time, cutting down on the time one-on-one appointments take.

However, these meetings can also have challenges. For people who do not like to commit money in public,

you will need to schedule individual follow-up meetings soon after. If you can’t hold a meeting at a time when most people can attend, you may want to have more than one meeting — a morning and an evening meeting, for example. For those who still cannot make either, you could mail a copy of the materials, a summary of the presentation, and a list of people who did come (or who were invited), along with a handwritten note asking for an individual meeting.

The biggest challenge that can happen at these meetings is that donors (or one donor in particular) disagrees with the strategy or the presentation and says so. Their reaction has the potential to raise questions in other donors’ minds about the validity and the strategic nature of the project, which could engender a series of comments and questions that could derail the meeting. This can be particularly problematic if the person is disruptive or tries to take over the meeting. If you know your donors, you may have an inkling of people who could pose this challenge. These folks might still give money, but they should be prioritized for an individual meeting.

Another way to head off such a scene is to check in with people over the phone when inviting them, assessing their interest in and alignment with the proposed project. Although you cannot dis-invite them, you can do some prep work with them on the phone before the

meeting to respond to concerns that might make other donors anxious.

Finally, good facilitation, combined with one or two key respected donors who are prepared to be supportive of the project and make a financial

commitment then and there, should help to temper any negative impact if this situation arises.

Raising Funds from New Sources and New Donors

There are three other groups of people who should be included when building a prospecting list. These are people who are already donors to other organizations or issues: donors interested in your issue area, constituency, or type of work; donors interested in general civic engagement and participation activities; and political and partisan donors.

You can approach donors interested in your issue area or constituency with a targeted message about why supporting electoral work is important to the issue they care about. For example, people who contribute to service organizations that are concerned about poverty, job

FOR YOUR MAJOR DONORS,
OR THOSE DONORS WHO
YOU THINK HAVE THE
POTENTIAL TO GIVE LARGER
GIFTS, CONSIDER HOLDING
A BREAKFAST BRIEFING OR
MORNING ROUNDTABLE.

training, unemployment, and housing issues may be interested in supporting work to educate voters and candidates about these issues.

The message that could resonate with these potential donors is that elected officials have the opportunity and power to address these issues through the policies they pursue. Although many people give to service organizations because they want to fund direct services, some of them may be interested in root causes and issues and want to see them raised in an election.

For donors and institutions that are interested in the general area of civic engagement, your message will focus less on the issue and even on change and more on “participation.”

To reach these potential donors you can trade lists with other nonprofits whose donors may be interested in your work in this area or rent lists from direct mail list brokers who specialize in nonprofit lists. Look for lists of people who support good-government groups and institutions such as the League of Women Voters. Because the response rate for direct mail is so low when you’re writing to people who have never made a contribution to your organization before (1 percent would be a successful result), this is an expensive approach, but may be worth it if you don’t have enough current donors to ask.

You can also use your prospecting research to identify donors who give large gifts to your issue area and try to interest them in funding electoral work. A good way to target these folks would be to try to cross-reference the people who give to your issue and also donate to candidates or political organizations. You can learn which donors these may be by asking related issue groups to identify these donors if they know which of their donors give to campaigns or candidates, or by checking to see if these donors’ names are on lists of campaign contributors. Those lists can be acquired either by asking candidates themselves or by requesting such lists from campaign finance boards and election offices. Each candidate is required to file a report of how much money they have raised, from what sources, and the amount of each contribution.

As with all fundraising from individual donors, the most effective way to reach these folks would be through a referral or personal connection. Although it can be hard to get people to share donor information, some organizations that provide services but do not do advocacy or

political work may be willing to make an introduction to a donor who may also be interested in electoral work.

Asking Foundations, Unions, and Religious Groups

Some foundations provide additional resources during election years to support voter work. Unions as well as some intermediary organizations (including national organizations) also have funding available for voter work, particularly voter registration activities. You can approach these institutions by calling or by sending a letter to ask if any funds or special pools of money will be available for the upcoming election. You can also set up meetings with the appropriate people at the institutions to talk about your project. Another approach is to set up a briefing similar to the one for donors and invite representatives.

Raising Funds for Larger Electoral Programs

For groups that are building larger or ongoing electoral programs, the donors who already give to political campaigns will be the base of donors you want to reach out to.

One of the biggest attractions for these political donors, particularly if you are doing nonpartisan work within your (c)(3) status, is the opportunity to make a tax-deductible donation.

The major challenge associated with trying to raise money from political donors is that they are used to using their donations to help a candidate win rather than to build an infrastructure that supports ongoing social and political change. These donors may want proof that your work will make a difference in the outcome of the election. When doing nonpartisan work you cannot make this case — only that you plan to increase participation rates. In a close race where convincing voters of the differences between candidates is critical, this outcome may not be enough for these donors.

Another challenge that may arise with political donors is that their interests can change from year to year, election to election. They have a tendency to invest in races that they perceive to be critical each election year. They sometimes do not understand and thus do not commit to building the ongoing capacity that long-term electoral programs require.

It is best to approach these donors with the mindset that it may take time to move them to understand the importance of your work. You will have to educate them about your work and how it ultimately will help to contribute to the ends they want. If you are successful, these

THE MAJOR CHALLENGE ASSOCIATED WITH TRYING TO RAISE MONEY FROM POLITICAL DONORS IS THAT THEY ARE USED TO USING THEIR DONATIONS TO HELP A CANDIDATE WIN RATHER THAN TO BUILD AN INFRA-STRUCTURE THAT SUPPORTS ONGOING SOCIAL AND POLITICAL CHANGE.

donors could end up being supporters of all aspects of your organization.

To find these donors you will need to do research. Checking out campaign finance reports and doing online research of specialized contributor search engines can produce lists of people, addresses, and potentially other contact information.

MOVING FORWARD

Once the decisions are made, the plan is set, and the resources are raised, the real work begins. Whatever type of project you decide to develop and run, electoral and voter work can be energizing and fun. It can also mean long hours, including weekends, and a lot of hard work. No matter what kind of organization or what kind of work you do, voter work is an excellent way to feel connected to your constituents, members, and your community — and to work for change. **GFJ**

PAUL GETSOS HAS MORE THAN TWENTY YEARS OF EXPERIENCE IN COMMUNITY ORGANIZING, ELECTORAL WORK, AND STRATEGY AND ORGANIZATIONAL DEVELOPMENT. HE WAS THE FOUNDING ORGANIZER OF COMMUNITY VOICES HEARD, AN ECONOMIC JUSTICE ORGANIZATION IN NYC. HE IS THE CO-AUTHOR OF *TOOLS FOR RADICAL DEMOCRACY*.

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Do What You're Told:

A Major Gift Campaign That Works

BY THOMAS R. PETERSEN

Six years ago I attended an intensive Getting Major Gifts training series taught by Kim Klein, fundraising consultant and co-founder of the *Grassroots Fundraising Journal*. The training was conducted in four weekend sessions over a series of nine months. Part of our assignment in the workshop series was to develop a major gifts campaign and then try it out — even on a small scale.

As the Development Director for Wildlands CPR — a small national conservation organization — I knew that diversifying our income was paramount, and a major gifts campaign wasn't yet a component of our fundraising strategy.

Determined, I decided we'd try one based on the campaign template outlined in the training. We went through the steps: creating a gift range chart, getting our asking team together, creating the letter, generating the calling lists, and then making the all-important calls and writing the as-important thank-yous.

The campaign worked! Even though we didn't meet our entire goal that first year, we were encouraged enough to want to improve and expand our major gifts program with each succeeding year. Now in its sixth year, the Wildlands CPR campaign is going strong.

What follows is what works for Wildlands CPR and can work for your group as well.

WHAT WORKS

Like baking and cooking (at least my style) "all" you have to do is follow the directions and, most of the time, the soufflé rises, the vegetables are lightly sautéed, and appetites are satisfied. In the case of our first major gifts campaign, we were absolute novices, beginning cooks, and it made an enormous difference to have specific direc-

tions to follow, along with the support of my peers and resources from the *Grassroots Fundraising Journal*.

The All-Important Gift Range Chart

One of the first steps I learned in the training program was creating a Gift Range Chart. This helpful tool, based on your monetary goal, charts out the number of gifts needed, at what amounts, and how many prospects it will take to get those gifts. For instance, conventional fundraising wisdom says that your top two gifts should equal approximately 10 to 20 percent of your total goal. The rest of the chart is calculated down from there, with the greatest number of gifts and prospects typically coming from the smaller gifts (\$100 and \$250). At each level, you calculate that you need to ask twice as many people as gifts you will receive, since only about half of the people will say yes. (See the sample gift range chart.)

Starting out, my co-worker and I brashly set a \$50,000 goal for our first campaign (our budget at the time was \$514,000, so it seemed like a reasonable objective) and then worked the numbers. But the numbers didn't work for us. We quickly saw a huge discrepancy, as the chart showed us that in order to raise \$50,000 we'd need 333 gifts — and that meant asking 666 people!

We looked at each other: "Did we have 666 people to ask?" No. Not even close.

So we started over, adjusting our sights based on how many people we thought we could ask, including existing donors and new prospects. Our second goal — \$20,000 — meant we would need to ask about 150 people. That we could do, and did, raising \$15,000, or 75 percent of our goal in our first campaign.

Not perfect, but it was \$15,000 more than we'd had three months before.

Team Ask

Getting our board (and staff) involved was not easy, but persistence paid off. At every annual board/staff meeting I did a song and dance about the campaign and their much-needed involvement. Literally: at one presentation to the board my development assistant played a boogie-woogie on the piano while I did a little shuffle dance step.

Although our routine wouldn't have made Broadway, it did catch board members' interest and showed that fundraising can actually have some fun wrapped around it. More board members signed on to the campaign that year than the year before, and we continued to make slow but steady progress, adding a board member or two to the asking team every year.

Another very helpful way we got more board members involved came about spontaneously. I was giving my usual pep talk to the board about joining our calling team (as a national organization with board members around the country, our asks are done by phone), and one board member raised his hand halfway through: "Last year was my first year on the call team," the board member said, addressing the whole board, "and yes, I was nervous at first, but in the end I found it a very rewarding experience."

He went on to detail some of the conversations he had had with potential donors and his relative surprise when people said yes to his ask. This peer-to-peer testimony was very effective at getting additional board members involved: Now I ask a board member to "testify" every year.

Once a critical mass joined up, we got (almost) the whole board to participate in our calling team, which we named Team Ask.

Preparing the Team

Here are a couple of details about how we work with our team:

- **Calling packets.** Though these may be standard for any gift campaign, it's worth mentioning how valuable these calling packets are for team members. In our calling packets we include the team member's calling list, a Wildlands CPR brochure, a set of talking points, the latest issue of

Wildlands CPR Gift Range Chart

FALL ANNUAL DONOR CAMPAIGN GOAL: \$35,000			
Number of Gifts Needed	Size of Gift	Total	Number of Prospects Needed
1	\$2,000	\$2,000	3
4	\$1,500	\$6,000	8
7	\$1,000	\$7,000	14
8	\$750	\$6,000	12
11	\$500	\$5,500	24
14	\$250	\$3,500	30
40	\$100	\$4,000	80
30	\$50-\$99.99	~\$1,500	60
TOTALS:	114	\$35,500	231

our newsletter, thank-you postcards labeled, stamped, and ready to go (everyone who is called receives a hand-written thank-you from the caller, no matter the response, a process that has resulted in very positive feedback), and a couple of cartoons relevant to our issues so we don't take it all so seriously!

The most important piece in the packet may be the calling list. This is an Excel spreadsheet with all the pertinent information

on the donor or prospect: name, address, phone number, giving history, relationship history (friend of staff or board or friend of friend), amount to ask for, amount pledged, and a comments column ("Call back" or "Have left 3 messages," and so on).

- **Team training.** Although the ideal is to do at least a one-day, face-to-face training with your calling team, because our callers are geographically dispersed, we have instituted a conference call phone training. In the training we go over calling how to's: how to present your need, how to be succinct, how to make the ask, how to respond to "maybe" and "no," and so on. We even do some role playing. (For a more detailed look at these methods, see Kim Klein's article, "The Fine Art of Asking for the Gift," and other useful resources at www.grassrootsfundraising.org.)

Although by necessity training by conference call is shorter (who could spend more than two hours on the phone?), it works fairly well and covers most of the bases. New members to our team seemed satisfied, and in fact they did well with their first year of calls. Team Ask veterans on the call have valuable experience to share with the newbies.

- **Prospect identification.** Each year we ask all board members and staff to come up with at least five new prospect names. With a board of eight and a staff of ten all participating, we have been generating about 90 new prospect names each year.

A Six-Week, Personal Campaign

Some conventional wisdom recommends campaigns go on for 8 to 12 weeks, and Wildlands CPR's first Gifts Campaign was scheduled to last 12 weeks. But that was way too long, both for board and staff. With not a huge

number of people for each team member to call (about 30 at most), we realized we could easily carry out our campaign in six weeks, and we have made it a six-week campaign ever since.

We also make it a “personal” campaign, meaning that we try to make our letters, phone calls, thank-you notes, and the whole style of the campaign personal. We do this by incorporating details that tell each prospect we’re personally interested in them. Touches that convey that message include using first names on the letters, hand-writing personal notes on the letters, hand-addressing the envelopes (with the size of our campaign this was possible), using attractive “real” stamps (as opposed to mass mailing meters), and doing our homework with each donor or prospect so that we could have an intelligent conversation with them about their needs, desires, and vision for (in our case) a protected, quiet, natural world.

Calling

Kim’s words reverberated in my mind as I reminded our team again and again and again: “If we say we’re going to call (which we do say, clearly, in our letters), call.” Call. Call. Call. This was both what worked and what was a challenge.

WHAT WAS CHALLENGING

Getting Team Ask Members to Make Their Calls

OK, I didn’t just remind them, I hounded them to make their calls. With weekly email pep talks I would write, “Make your calls, make your calls, make your calls.” I showed them the results: our average gift was very good, so it was simple math — the more people we called, the closer we could come to our goal. Call. Call. Call.

We also set up team calling nights: specific nights during the week that we suggested as many of the team make their calls as possible. For example, before the campaign started, we would pre-schedule six nights (one night each week for the six-week campaign) so that many team members would call on the same night. This set-up would give the team a feeling of camaraderie, that they weren’t calling “alone,” that other members of the team were making their calls that same evening.

In addition, we’d sometimes set up a short (15-minute) follow-up conference call with the team members right after the team calling night, and ask for “best call” scenarios from the team. Sharing these success stories with the other members was encouraging and inspiring and added to the team spirit of the campaign.

These specific, pre-arranged calling nights also allowed team members to put calling nights on their calendars, knowing ahead of time when to make their calls. Not having to worry or think about the calls the rest of the week was helpful to them and eased the pressure.

Finding New Major Donors

If you don’t continue to increase significantly the number of new gifts you’re getting in, it will be hard to increase the total that you raise. At Wildlands CPR, even though we ask board and staff for new names each year, because of attrition and people who say no to our asks, our ask list of current donors and prospects hovers at around 275 each year.

Our response rate is good — about 50 percent from prospects and upwards of 65 percent from our regular (annual) donors — and the average gift is about \$200. All we need to get past the plateau we have reached of \$30,000 income from the campaign is more people to call.

If your program gets to this point, you’ll need to look for other ways to reach more people — such as getting more people involved in asking their friends and contacts.

A larger base of donors overall is really the only way to increase the income from major gifts, because most large donations will come from people who have given before.

SMALL IS BEAUTIFUL

A few years ago, we shifted from calling what we were doing a Major Gifts Campaign to calling it an Annual Gifts Campaign. This change reflected the reality of how we found the word “major” interpreted by our donors and prospects. “I’m not a *major* donor,” said one, “I would just be able to donate a little.” “Oh, you’re looking for major donors,” said another, “and I’m only able to give \$250.”

As the All-Important Gift Range Chart shows, “small” donors are key. Our 2007 Annual Gifts Campaign, for instance, raised almost \$30,000, with 42 of those gifts coming in at \$100 and another 23 at \$250. (For Wildlands CPR’s purposes, we include all donors who have given us at least \$50 during the year in our annual campaign, and, like all our donors, ask them to consider increasing their gift for this year’s campaign.)

THE BOTTOM LINE

It’s only fitting to end with words from Kim herself, summarizing, I believe, the gist of her Major Gifts recipe. It’s telling that these two quotes, in different sections of her *Getting Major Gifts* booklet, are so similar:

“If you are serious about raising big money, ask for it.”

“Stop looking for it [money] and get busy asking for it.”

You know what? Do what she says. It works. **GF**

TOM PETERSEN HAS BEEN DEVELOPMENT DIRECTOR OF WILDLANDS CPR FOR 11 YEARS. HIS NATURE ESSAYS HAVE APPEARED IN *ORION*, *ISLE*, AND OTHER MAGAZINES, AND HE IS EDITOR OF THE BOOK, *A ROAD RUNS THROUGH IT, REVIVING WILD PLACES* (JOHNSON BOOKS, 2006).

Cheering Them On!

How to Encourage Board Members to Make Their MAJOR DONOR ASKS

BY BEN GREGORY

EDITOR'S NOTE: Colorado Conservation Voters (CCV) launched their major donor campaign by training their board members in making the ask, then going into high-gear follow-up. Each week, development director Ben Gregory sent a chatty and cheering email to all the askers.

In order to keep board members motivated, reward those who were successfully completing their asks, and make their fundraising progress visible, they created “The CCV Ask Tree” and included it in every email, along with a “Tip of the Week” to reinforce good fundraising practices.

The tree, shown here, got filled in as asks were made and donations received. Each leaf represented a meeting request or ask letter from a board member. Meetings held were represented by fruit blooming on the tree, and donations received (the green stuff) piled up beneath the tree's branches, as in the second image on the next page.

The emails also reminded askers of some key incentives, such as special gifts and benefits that accrue to their major donors, the fact that people could become major donors by giving smaller amounts over time to add up to a major gift, and the terms of a challenge gift from an anonymous donor.

The weekly tips were a clever way of getting board members' attention and reinforcing the fundraising training they had received by reminding them of asking strategies. But their main effect was to keep people engaged in the process by passing on news about the campaign — each week updated progress toward meeting the challenge gift — and about recent organizational accomplishments. Because the work of board members in a campaign like this is very solitary — the calls and meetings are done individually, as opposed to as part of a group effort as with an event or phone bank — this weekly communication served to keep people feeling connected to the larger campaign, which in turn helped them stay on track with their tasks.

In addition, each email reinforced that help with their fundraising asks was only an email or phone call away. A brief section at the end of each email headlined “Let Me Help You” encouraged askers to contact the development staff for help with letters, donor packets, supplies, research, advice — “anything that will make your fundraising easier.”

Gregory's enthusiasm and cheerleading had the desired effect: spurred on by the weekly reminders and encouragement, board members raised more than \$13,000 in the three months they had allocated to the campaign.

Following are nine tips board members received over the course of the campaign.

TIP #1: HOW TO HANDLE THE PUT-OFF

When making your meeting request calls, many of your friends and colleagues will have completely valid reasons for not meeting now. The most important thing to remember is to listen to what they say and take it at face value. “I'm too busy right now” means they are too busy right now, not that they won't consider a contribution to CCV. Below are some suggestions for how to handle common responses:

- “I don't have time to talk right now.” =
 “When would be a good time to call?”
- “I don't have time for a meeting, can't we do this over the phone?” =
 “The meeting will only last 20 minutes or so and I am happy to come to you. It really helps to meet face to face, but we can do this over the phone if we must.”



CCV Ask Tree
BEFORE

- “I’m strapped for cash right now and can’t donate \$500.” =
“Your contribution is completely up to you. I’d still like to sit down with you and talk about CCV’s work and find the appropriate contribution for you.”
- “All my money is going to get Obama/McCain/Clinton/Snoopy elected.” =
“This is certainly a big year across the country. I’d still like to meet with you to discuss the incredible influence the Colorado legislature has over environmental policy. Maybe you know someone else who would be interested in investing or would like to support us after the elections.”

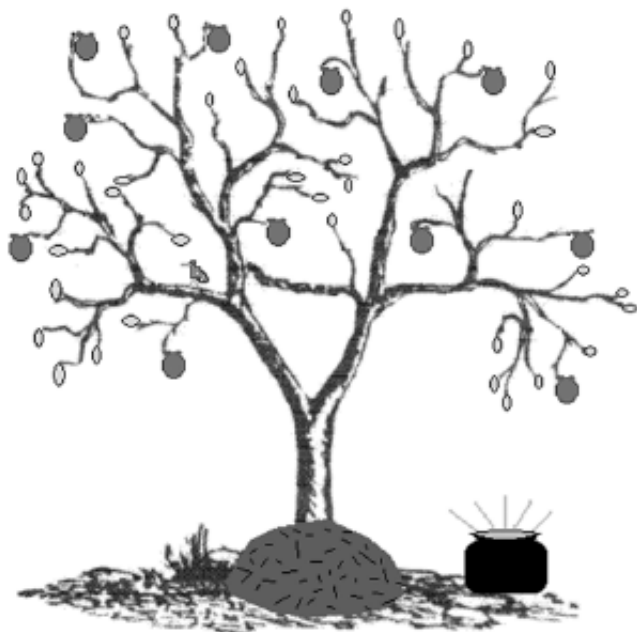
Remember — take what they say at face value and don’t miss an opportunity to introduce someone to CCV, even if they might not be writing us a check today.

TIP #2: WHERE SHOULD YOU TRY TO MEET YOUR PROSPECTS?

The proper location for your donor meetings can make a big difference. Here’s a list of some of the options and things to consider before you suggest a venue:

The prospect’s home — Traditionally considered the best place to make an ask. It is very important that your prospect is at ease and there are few interruptions, making a home visit ideal. You also have the advantage of a more relaxed pace if you wish to linger awhile instead of making the ask in a rush.

The prospect’s workplace — The second-best choice, meeting at a workplace, allows you to talk to the prospect on their “home turf.” There will be a greater opportunity for interruptions than at their actual home, but it is still a great place for an ask meeting.



CCV Ask Tree
AFTER

Halfway up a fourteener or at your favorite fishing hole — Maybe a bit of an untraditional ask, but what better place to talk about what CCV does than in nature? You won’t have the comforts of home, but reminding people why they love Colorado has a lot of value.

The CCV — This one is a mixed bag. The donor is going somewhere new, so they won’t be as at ease as at home. On the plus side there are opportunities to see the organization and meet the staff. There are tons of opportunities to show off our campaign pieces and scorecards. If you’d like to meet at the offices, please let me know in advance so I can reserve a quiet spot for your ask.

The lunch meeting — Actually the worst place to make an ask. You will have to deal with constant distractions from your fellow diners, the lemon that your prospect asked not be added to his or her water but was anyway, and the pesky waiter interrupting right as you had started your pitch. And then there is the awkwardness that can come with the check. If possible, try to meet somewhere other than a restaurant or coffee shop.

TIP #3: THE VALUE OF PROPS

One of the advantages of meeting face to face with donors is that you have the opportunity to tell the CCV story with more than words. We have prepared major donor packets that include actual samples of our work — the Scorecard, the Governor’s Report Card, campaign pieces, and an absentee ballot mailer. These can be very valuable to illustrate what we do. Also included are select pieces from the Storybank and a Board list to highlight our incredibly talented volunteers.

There is new growth on the tree. Jeff added a leaf through his first meeting letter and John added another fruit with his second successful ask. And there at the base of the tree is a pile of money! The money pile grows every time a Board member brings in a \$1,000 or higher contribution. Way to go John! Let’s fill this tree out for next week.

TIP #4: SILENCE IS GOLDEN

One of the hardest things to do when you’ve just made your ask is to give your prospect time to answer. Your donor will have a lot to think about and you should not fill that silence with words out of nervousness. Do whatever it takes to give your prospect a chance to respond — mentally count out 10 or 12 seconds, have a drink of water, whatever. Just give your prospect time to think about it before you speak. And remember it isn’t a staring contest — you don’t need to steel yourself by staring at the prospect while waiting for an answer. Relax and be natural.

TIP #5: THE PLEDGE FORM IS YOUR FRIEND

Your prospect just said he or she wants to contribute \$10,000 and you gave him or her a hearty thank you — now is the time to hand over a pledge form. By getting your

new donor to fill out a pledge form we will know when the gift should be made and when it is acceptable for us to follow up with the donor if it hasn't arrived. Two minutes spent going over this form can save weeks of delay down the road as you try to remember what was said and what was committed to at a then-distant meeting. I've attached the CCV Pledge Form to this e-mail for your convenience.

TIP #6: THE POWER OF \$85

\$85 isn't all that much money any more. It'll get you a couple of DVDs, maybe a season of the Sopranos, and some popcorn. Dinner for three and a couple of drinks at a mid-priced restaurant. Two tanks of gas. Things that a lot of people buy without really thinking about it too much. But \$85 a month adds up to a contribution of more than \$1,000 in a year. CCV is easily able to accept monthly contributions by credit card. Remember to give your prospects this option when you're making your asks.

This week, two new leaves sprouted from Gary's first asks and John added another fruit by introducing a new donor to CCV. Excellent work, fellas. If only seven new asks are made next week, I'll have to add another branch...let's make it happen!

TIP #7: BLOCK OFF YOUR TIME

We are all very busy people. Between our immensely successful careers, our wonderful friends and families, and our all-important hobbies, it can be tough to find the time to devote to being a volunteer fundraiser. Even professional fundraisers can find that their day fills up quickly before they've had a chance to make their calls. If this has been a problem for you, try scheduling CCV fundraising time into your calendar. Once or twice a week, set aside an hour to concentrate on getting your asks wrapped up, and

then you won't have to think about it all the time. Just make sure that when that hour does come around that you stick to your schedule.

TIP #8: PARTY TIME!

Next week, CCV will kick off its 2008 Event lineup with a Birthday Party for longtime volunteer Faith Winter on Thursday. While all of your Board fundraising asks are for significantly more than the suggested donation for these events, you can still use these as an opportunity to introduce your prospects to CCV. Invite your prospects to join you at one of these events, explaining that you are asking them for a leadership gift of \$XX and that this is a great opportunity to meet the executive director and the excellent staffers and volunteers who support CCV. You don't want to put pressure on your prospect in public, so it is important to make the ask before the event itself and use this as an informational opportunity.

TIP #9: TELL THEM YOUR STORY

Over the years, each of you has invested a considerable amount of time and your own money in CCV. Your reasons for supporting CCV personally are the most compelling cases that you can state for your prospects because they are closest to your heart. Tell them about why you moved to Colorado, why you care about the environment, or what convinced you to invest in environmental politics.

*Another fruit popped up thanks to a gift from one of John's prospects. Good work, John! We still have time to fill the tree before the Board Meeting. Let's make it happen! **GF***

BEN GREGORY IS DEVELOPMENT DIRECTOR FOR COLORADO CONSERVATION VOTERS.

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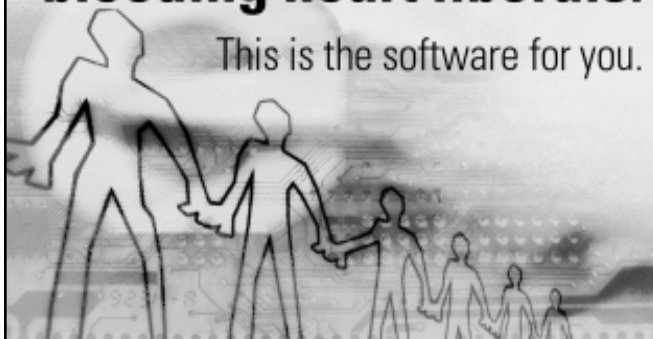
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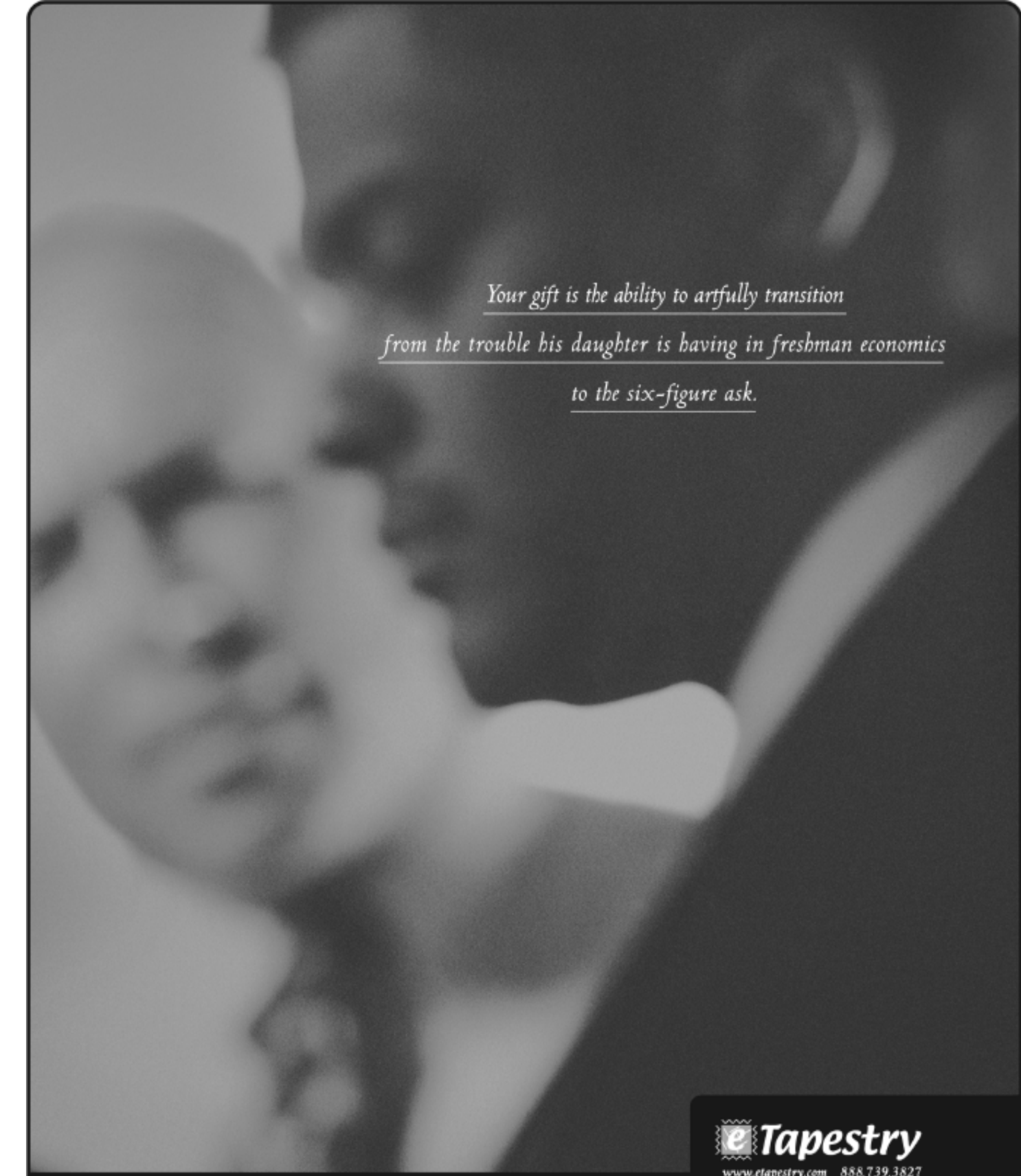
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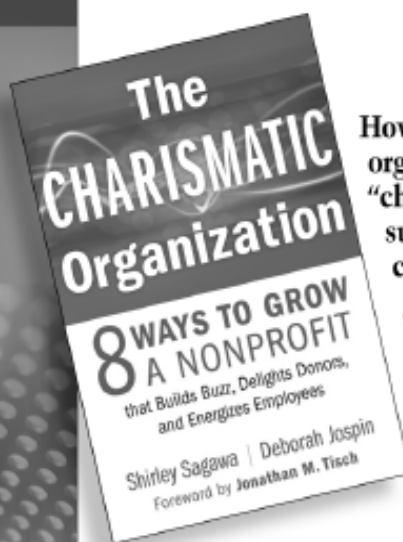
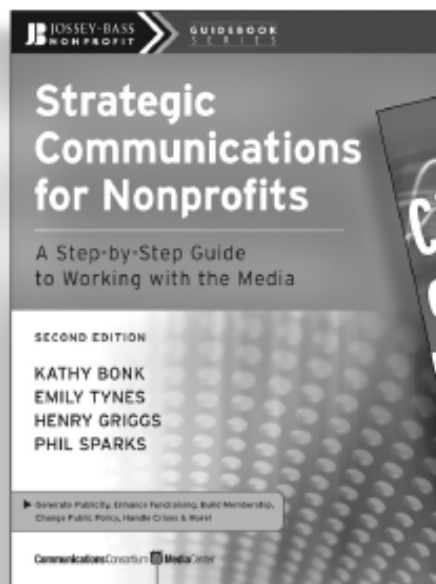
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