Grassroots Fundraising Journal

VOLUME 33 NUMBER 2 • MARCH–APRIL 2014

A PUBLICATION OF

GIFT Grassroots Institute for Fundraising Training

Expanding Your Base of Support

Amplify Your Organization's Greatness

15 Tips for an Excellent Problem Statement

Build a Better Fundraising Appeal

Revolutionary Etiquette of Crowdfunding

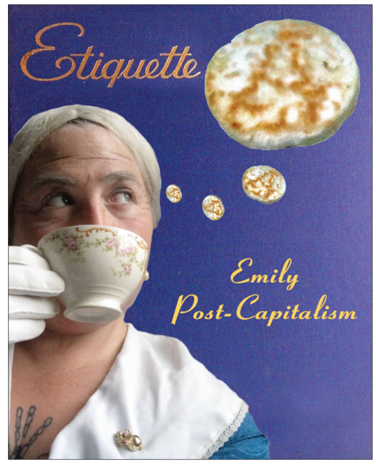
Jump-Start Your Fundraising with Prospect Research

Visit us online at grassrootsfundraising.org

Contents

Volume 33 | Number 2 • March–April 2014

FEATURE



ON OUR COVER

Special thanks to Southern Echo Executive Director Leroy Johnson, who reminds us of an African proverb that says when spider webs unite, in time they can hold the king of beasts. Southern Echo models its work on the concept of linking fragile webs together to build strength. Learn more about Southern Echo in our feature article about amplifying our organizational greatness.

Grassroots Fundraising Journal

A PUBLICATION OF

GIFT Grassroots Institute for Fundraising Training

The *Grassroots Fundraising Journal* is a bimonthly publication of GIFT.

PUBLISHER EMERITA
Kim Klein

EDITORS
Jennifer Emiko Boyden
Ryan Li Dahlstrom

GRAPHIC DESIGN
Chris Martin

COPY EDITOR
Sonny Singh

COVER IMAGE
Paul Maguire Photography

For subscription inquiries, to request permission to reprint *Journal* articles, and for advertising information, please contact: jennifer@grassrootsfundraising.org

GIFT STAFF
Jennifer Emiko Boyden
Communications Director
Ryan Li Dahlstrom
Movement Building Director
Laurene Francois
Training Director
Nan Jessup
Finance & Operations Director

GIFT: 1904 Franklin Street, Suite 705
Oakland, CA 94612

info@grassrootsfundraising.org
grassrootsfundraising.org

PHONE: 888.458.8588 (TOLL-FREE)
510.452.4520 (SF BAY AREA)
FAX: 510.452.2122

Periodicals postage at Oakland, CA 94615
023-243.
Postmaster: Please send address changes to
1904 Franklin Street, Suite 705
Oakland, CA 94612

 | ISSN No. 0740-4832

Riding the Wave of Unpredictability

By Ryan Li Dahlstrom

Greetings,

What a strange and unpredictable winter this has been. From the sudden sweeping polar vortex with record-breaking snow in Portland and Atlanta to a drought in California, this winter has been scary, unsettling, and a constant reminder of the devastating impacts of environmental degradation and climate change.

Much like changing climates and unpredictable weather patterns, many of us find our organizational funding streams and individual donor programs increasingly stretched, erratic, and facing disaster-like implications of the current funding climate. Through my volunteer work with a number of community-based organizations and conversations with many of you, it is clear that many of us are grappling with how to keep donors engaged, giving, and motivated to upgrade their gifts. Many donors report feeling "fatigued" and "stretched to give any more than they're already giving." As more and more of our ally organizations lay off staff, cut programs, or close their doors due to political and funding challenges, it becomes increasingly important for us to collectively figure out how we can consistently and substantially increase our donor base of support.

By exploring ideas and strategies for identifying and acquiring new donors, we hope this issue of the *Journal* will help shed light on some of these ongoing challenges. We first hear from Holly Fincke and Rebecca Johnson, who encourage us to get better at talking about our organizations' successes, and in turn, draw more attention and interest from current and potential supporters. Judy Kunofsky follows with 15 tips for an excellent problem statement. Next, Peter Schoewe shares best practices and tips for utilizing direct mail, particularly for smaller organizations. Ezra Berkeley Nepon interviews Annie Danger about critical ethical considerations for creating crowdfunding campaigns. Last, we hear from Armando Zumaya with tips and recommendations for prospecting new donors for your organization.

As always, please stay in touch and share your feedback on this issue along with any ideas you may have for future ones.

In struggle and light,

Ryan Li

You've Got Something to Talk About: Amplifying Your Organization's Greatness

By Holly Fincke & Rebecca Johnson

"When I dare to be powerful, to use my strength in the service of my vision, then it becomes less and less important whether I am afraid."

~Audre Lorde

SOCIAL JUSTICE ORGANIZATIONS are doing incredible work all over the country. But as consultants, we often see organizations that downplay their greatness to potential donors and funders—sometimes even to their closest constituents. To illustrate this point, which organization below would you more likely to support?

Southern Echo is a leadership development, education and training organization working to develop effective and accountable grassroots leadership in African-American communities in rural Mississippi and the surrounding region through comprehensive training and technical assistance programs. Our work has carried Southern Echo staff into 12 additional states across the south and southwest.

Southern Echo is a leading contributor to the development and implementation of equitable public education policy in Mississippi and the nation. Recently, Echo's work has led to a rare collaboration between the U.S. Department of Education and Department of Justice to reduce the school push-out epidemic, saving millions of children of color from punitive disciplinary policies that deprive them of the education to which they are entitled. Echo staff has been invited to help craft public education policy in 12 states throughout the south and southwest. This work continues Echo's vision to dramatically improve public education in black, brown, and low-wealth communities. In a testament to the power of Echo's work, the Chair of its Board of Directors was honored by the White House as a Presidential Scholar for her education reform work.

Same organization. Yet, one description is more likely to convince a prospective donor to give. We do our base a disservice when we don't sing our own praises.

WHAT'S GOING ON?

Why do so many of our organizations downplay themselves? Sometimes we assume that everyone "gets" who we are and what we are doing. This is especially true if our organization has been around awhile.

We can also simply get really busy and not put in the time to think about the various audiences interested in our work, what messaging would be most effective for them, and if those audiences have changed over time. Mireya Gomez-Contreras of the Day Worker Center of Santa Cruz talks about the challenge: "At a recent fundraising training for day labor programs, many of us had a big realization that we don't talk up our work enough, and that isn't helping us achieve our goals. We wait and wait for the right moment to highlight our successes or wait until we're confident of the right way to say it...and then we don't get to it."

Deeper issues of culture, gender and internalized oppression play a role at times as well. Humility might be highly valued, so highlighting our accomplishments might seem like bragging. Perhaps you have even been frustrated when you see a partner organization claiming too much of the credit, and thus funding, for collaborative work. But in creating your own more principled organizational culture, you may also be selling yourself short.

In addition, we can internalize the opinions of the dominant culture about our own communities, work or approach. Perhaps those viewpoints affect our own core sense of what we have accomplished and then what we convey to prospective donors.

Last, sometimes in our desire to be different from the dominant culture and address power imbalances that lead to ignoring our grassroots members, we can downplay the important leadership roles of board and staff in our organizations. Funders and donors want to know that they can trust the management and vision of those in leadership positions. Their key question is: In whose hands am I putting this check?

Leroy Johnson, executive director of Southern Echo, describes another kind of power imbalance that can affect the ability of member organizations to claim their accomplishments:

"The local groups have toiled in the fields and dealt directly with issues but haven't taken any real credit for the work they have done. Once your work has been elevated and national groups see it, they want to come in and be a part of it. They think, 'We can all work together.' The national organizations take a lot of responsibility, they write up the work, taking a lot of the credit for accomplishments. The grassroots get lost in the process. Funders talk about the great work the national group has done in Mississippi but not about the Mississippi group that has done the work. We are supposed to be a social justice movement, but this isn't just or fair."

Ask yourself: Are you the voice for your work or is someone else? Do you claim your skills, achievements and capacity? Or, are you caught up in the work and not communicating your vision and accomplishments in regular increments to donors and prospective donors? If not, what is holding you back?

LET'S TALK OURSELVES UP

As an organizational practice, take a few times a year to really talk yourself up. Let the ideas flow from your members, staff and board about what is valued about your organization. This could take the form of an annual "Accomplishments Party." List ideas on a wall length poster and celebrate your work with members, community and leaders. Then choose the three to five accomplishments that everyone is the most proud of.

Each group will have its own unique talking points, but here is a checklist of some key areas in which we often see social justice groups downplay themselves to help you get started:

Your organizational story and vision: Every organization has a compelling story that explains why the organization started and the vision that holds it together. Most of our organizations came together out of many people recognizing a great injustice and achieving change in the face of great odds. These are often inspirational stories that we skip over, yet are highly motivating to potential donors.

Our history is not all of who we are. Our political visions are also compelling and are sometimes buried in a laundry list of what we do day-to-day. What is the vision you want everyone to know you have? More organizations are looking to the field of storytelling to craft their messaging about their vision in more conscious ways.

Achievements: Some types of achievements that are convincing to prospective donors are:

- **Campaign wins**, especially wins that are framed on the largest scale possible and linked to real community impact. Did your win bring dollars into households? Are people safer or healthier? Did you set in motion other policy advances? If you are a local group, did your win play a role in moving a state or national policy? Did you develop a new idea or tactic that sister organizations are now using?
- **Grassroots leadership.** The name of the game in movements is building leadership. Numbers alone don't tell the story. Most impactful are stories, quotes and images from your members who have grown as leaders, linking their individual stories to the story of growth in the base and to the win or possible win.
- **Leading the way**: Is your work a model in some way? Are you recognized by allies, leaders or the media? Are you playing a leading role in a coalition? In the Southern Echo example, the implicit message in the statement, "The Echo staff has been invited to help craft public education policy in 12 states throughout the south and southwest," is that their peers respect them.

Now that you have identified lots of powerful things to say about your organization, can you pack your most powerful achievements into three bullet points? Particularly in grant proposals, many groups list too many accomplishments.

Leadership and Alliances: The great fundraising truism is that people give to people. So, who are your people and what do they bring to the table? For funders and major donors, they may just need to know about the executive director and one or two other staff or board members. What can you say about lead staff and board members that highlights their expertise and their personal interests and qualities that might serve as a connection to donors?

This does not mean downplaying your members' contributions and the entire ecosystem of community support for your work. Absolutely talk about that as well. But it does mean recognizing

Checklist for Highlighting Organizational Greatness

- Organizational story—the compelling story of how why you exist
- Your vision for change
- Achievements: your wins, grassroots leadership, and how you're leading the way
- 3-5 key points only!
- Leadership and alliances that power your work

that funders and donors want to know that their gifts or grants will be managed well.

The alliances and coalitions you are part of also speak to your credibility as a trusted organization by others in your field. What are the top relationships you have that prove your reach and credibility within your movement?

SIX PRACTICES TO AMPLIFY YOUR GREATNESS

1. **Improve writing skills within your organization:** Writing is key to fundraising, yet good writing is linked to educational and class privilege. The need for writing skills to tell our stories privileges people and organizations that can hire writers. Thus, our organizations need creative ways to address the writing barrier through volunteer mentors or finding ways to systemically improve our capacity. Outside readers can also give us great feedback on not only writing but also what we may not be saying about ourselves.

   Southern Echo recognizes the kind of support organizations need to address this power imbalance. As Leroy says, "We know the national groups have the writing skills, but those of us with experience and skills who assist smaller, grassroots organizations don't always focus on building communications capacity, especially in claiming our accomplishments. In our education coalition, we recognize they don't always know how to describe the work. National groups can write, have stuff published in the New York Times, and we think, 'This will be good!' And then when you see the articles they produce, we say, 'This is good, but it's not about us!'

   "We need to be more dogmatic about pushing our allied organizations and helping them to write. As our organizations gain confidence, they can negotiate with national groups about how to express what has been done. They can now say, we can write it. People, when they are more comfortable about with writing, can say, 'Let's write it together.'"

2. **Leverage technology and communications:** Another way our achievements are hidden is in the technology and communications choices we make.

   Website: Can someone looking at your website quickly know what makes you a great organization? Can they easily learn about your victories, vision and compelling achievements?

   Newsletters and direct mail: What rests "above the fold" of your postal and email newsletters? How do you use social media to communicate good news about your work? How frequently are your fundraising base and prospective donors hearing from you?

   You can get a lot of ideas for effective messaging by checking out other organizations' year-end newsletters. For example, in late December, the National Domestic Workers Alliance sent an email, "A New Year of Big Possibilities for Domestic Workers," that highlighted five major 2013 achievements and, in brief, sketched out the vision for 2014 (along with asking for a gift).

   You can also use these tools to let current and potential supporters know about the people (staff, board, members) behind the organization making your accomplishments happen.

3. **Highlight fewer accomplishments:** Groups often want to highlight every aspect of their work and give equal attention to all the issues they work on. However, this can make it unclear to readers what the major accomplishments are and what they mean to the community. Fifteen highlights are too many! Think strategically and critically about the priorities you want to convey and what you have accomplished. In your next newsletter or fundraising letter try choosing a maximum of three accomplishments that cut across many of your issues.

4. **Collect stories as you organize:** How many times have you heard a member say something amazing about your organization or their journey to becoming a leader, but nobody recorded it or wrote it down? Plan ahead, and build this documentation into your organizing plan for

Talk Yourself Up in 2014

It's still early in the year. There is plenty of time to ramp up communication about your organization. We suggest focusing on improving these five areas in 2014:

1. Tell more stories that highlight your accomplishments.
2. Upgrade your website so your greatness is obvious.
3. Acknowledge that the writing challenges many of our organizations face is real. Ask for writing help. Try budgeting for it or getting volunteer help.
4. Talk yourselves up internally. Make talking yourselves up a regular part of your staff and leadership meetings as you celebrate yourselves.
5. Send more regular communications to your lists if needed. Supporters will know to look forward to news about your good work.

public events. Over time, you will have a bank of stories and quotes, making it much easier for when you need them.

5. **Create the space to share good news with members:** Sometimes the focus of communication with our most loyal constituents and members is all about issue strategy, action alerts, and turn out for meetings or demonstrations. People join our organizations because they want to be part of creating change and feel connected to the issues we are addressing. The more your base has a chance to celebrate your organization's work and join together, the more they will contribute time and money.
6. **Discuss your fears and contradictions with colleagues:** The prospect of more fully claiming our greatness can bring up feelings of internalized oppression, inadequacy, fear, and more. Consider making this a subject of a lunch with a fundraising colleague from an ally organization or a discussion at a training. The results can be eye opening. Mireya Gomez-Contreras of the Day Worker Center of Santa Cruz had just such an experience saying, "It really helped to be in a room with other day labor programs talking about our own hesitations in talking about our successes and some of the contradictions that we struggle with. If we highlight our organization's work, are we downplaying our allies' contributions? If we highlight the strengths and experiences of us as staff because funders or donors want to know about us, are we devaluing our grassroots bases and our belief that they drive social change? Just having that discussion with sister organizations opened my eyes and made me feel more confident to talk up our work."

These steps will help you claim your organizational greatness. They will build morale and excitement; the money from new and current donors will follow. ■

Rebecca O. Johnson is a core consultant with RoadMap Consulting. Holly Fincke is an affiliate consultant with RoadMap and directs the Windcall Institute. They recommend *Undoing the Silence: Six Tools for Social Change Writing* by Louise Dunlap and *Writing To Make A Difference: 25 Powerful Techniques to Boost Your Community Impact* by Dalya Massachi as additional resources.

15 Tips for an Excellent Problem Statement

By Judy Kunofsky

YOU MIGHT BE ASKING an individual for money, making a pitch at a fundraising house party, or speaking at a conference. Maybe you are sending a letter asking a business for support or drafting a written proposal to a foundation or government agency. Your first challenge, in a very short amount of time (or space), is to persuade the prospect to care about the issues and people you care about. Only when you achieve that will prospects be open to hearing about what a good program you run. The case you make is called the "problem statement" or "need statement."

Prospects want to know about the broader issues and root causes you are addressing. Every nonprofit needs money, so the "problem" they want to hear about is not that you will have to close programs and layoff staff without their support. The "problem" is the situation in the world, the issue you are addressing, and why your group believes it must do something.

Here are 15 tips for an excellent problem statement:

(1) Paint a vivid picture of the current situation. Tell a captivating story about the challenges. Use adjectives to heighten the imagery. Consider beginning with "Imagine…" For example, "Imagine growing up in foster home after foster home, with no long-term connection with any loving adults…." Or "Imagine if the empty lot at the corner of A & B Streets, now filled with beer bottles and empty syringes, were a flourishing community garden, filled with happy people of all ages sharing stories about their gardening successes and challenges." Tell what the land looks like, who and what it is near, who owns it, what hurdles need to be overcome to create a garden, and who would then use it.

(2) Describe the constituency you serve. What can you say about their race, ethnicity, occupation, urban/rural, experience, etc.?

(3) Identify and characterize the geographic area you cover. Describe in an interesting and understandable way the geography you serve. This is particularly important if you are approaching a funder elsewhere, who might not know anything about your community.

(4) Convey the extent of the problem. Persuade the prospect that the need is real and important. The most effective data often is from a source independent of you, such as a government agency or another nonprofit. If you can't find such research—or none exists—rely on your own participatory research. For example, "95 percent of the clients in our medical clinic tell us they have not seen a dentist in at least five years."

(5) Demonstrate the urgency. Has a recent gang injunction policy been targeting and locking up some of your key youth leaders? Share the pressing issues facing your community so your prospective funder can understand that your work cannot wait.

(6) Avoid circular reasoning. Don't say, "Our community needs a swimming pool because it does not have one." You need a swimming pool because it will provide exercise and build community for kids who might not have anything else to do on hot summer days.

(7) Find the right balance between presenting statistics and pulling heartstrings. How do you know if you are using too many statistics or too few? Being too emotional or not emotional enough? Rely on the judgment of trusted friends not associated with your organization. Present the draft problem statement (orally or in writing), and ask what they think and how they feel. You want listeners (and readers) to respond to your presentation by becoming emotionally connected to your issue.

(8) Show timeliness when possible. People like to donate when the time is right. For example, your pitch is timely if you focus on the need for better preschools in your community as part of a campaign to affect state agency decision-makers who are developing a new regulation that could support (or hurt) local preschools.

(9) Don't be a downer. If your presentation is overly dismal, the prospect may prefer to focus their donations on problems that don't make them feel hopeless. That's just human nature. People want to support hope and not hopeless situations. Find a way to be real while also offering solutions and generative ideas that address the conditions you're up against.

(10) Present evidence that the problem has solutions. Cite research about programs that have been shown to be effective, including the kind you are operating. Or explain that you are testing something that has never before been tried and how you will measure the effectiveness of your approach and report the results to other nonprofits. It's a good idea for every organization trying to change the world to recruit a professor to keep up on the research and let you know what strategies are being implemented elsewhere in the country (or the world) and which ones have been shown to be most effective.

(11) Convey your knowledge and insight. Don't say that your organization is knowledgeable and insightful, demonstrate those qualities. Convey that your organization understands the problem well enough to be in a good position to address it.

(12) Speak to your audience and their values. While some funders you are prospecting will share your values completely, others might not be a perfect match. Speak to what you know they're interested in without compromising your organizational values. If it seems like a funder will not be an ally, don't waste your time putting in a full proposal. If it's a foundation or business, consider having an initial call with a program officer or speaking with one of their current grantees to get a better sense of their values and priorities before approaching them for support.

(13) Say enough but not too much. Some fundraising books say a written problem statement can be as long as three or four pages, but most funders now request complete proposals no longer than five or six pages. And if you are talking with someone directly, you might have only a few minutes to make a powerful case before their attention wanders. You should be able to describe the problem in one page, one paragraph, and even one sentence. Sometimes social service groups are much better at describing their work than the problem they address because the latter is so difficult to think and talk about. Challenge yourself to be real and direct about the issues you are working on, even if they are emotionally charged for you.

(14) In a written problem statement, do not talk about what your organization is going to do to address the problem. A description of your program belongs elsewhere in a written pitch, in a different section or at least in a different paragraph. You want to make it easy for the prospect to go back to your written communication and find what they are looking for. Presenting the need (the problem) and the solution (your program) separately makes their task easier. The one exception to this tip is if you are seeking funds to make your organization stronger (capacity building) or for a capital campaign, rather than to run a program. In those cases, the problem statement has to talk both about the problem in the world that your organization addresses and your organization's need to become stronger with a new building, computer system, or training program.

(15) Match the scale of the problem to the scale of your program. A few years ago, a student in my grant writing course at Sonoma State University drafted a problem statement that described in compelling terms how human life is at risk due to threats to the planet's life support systems. His program description, though, described how his group wanted to educate the public during Sonoma County's many summer fairs. While the latter was a good project, it appeared to be a drop in the bucket compared to the huge scale of the problem he had defined. His proposal became much more compelling after he rewrote the problem statement to describe the Sonoma County public's enthusiasm for sustainable living and the opportunity to reach tens of thousands of people on that theme each summer at community fairs.

Following these tips will help you be more effective in persuading your fundraising prospects to care about the issues and people you care about. Once you have accomplished that, you will have gotten over a major hurdle to securing funding. Your prospects are now ready to listen eagerly to how your organization is working to address the problem, and ultimately, consider giving you money. ■

The author encourages you to identify more tips for an excellent problem statement. You may communicate with her at Kunofsky@jmjline.com.

Judy Kunofsky has many years' experience in virtually every aspect of nonprofit work. Now a consultant, she assists nonprofits through her business, JMJ Consulting, specializing in foundation and government prospect research and proposal writing. She does training on fundraising in general and on foundation fundraising in particular, and teaches the grant writing course at Sonoma State University, part of their Masters in Public Administration Program. She is also part-time executive director of KlezCalifornia.

Building a Better Direct Mail Fundraising Appeal

By Peter Schoewe

I'VE OFTEN HEARD A PIECE OF ADVICE about direct mail fundraising that I don't believe is correct. The advice is: You are not your audience, so do not try to use your own interests or likes to dictate what goes into you fundraising letters. If you do, you will create an appeal that is stilted and insider-focused.

While it seems sensible, I think this is bad advice because the greatest strength of a fundraising appeal comes from the true expression of the passion for a cause and the need to make a difference. If you believe in the work you are doing and can tell a compelling story about why people should support your work, you are the absolute best person to create a letter asking for help.

Then why is it so hard to create great direct mail fundraising appeals? I don't think it is because groups aren't keeping their audiences in mind. I think it is because they pay too much attention to their audience. If you concentrate on the idea that you are writing to a pool of hundreds or thousands of people—some who might be on your board, some who might be good friends with a major donor—you will naturally create the least provocative appeal possible: one that outlines your achievements, presents no concrete need, and asks tentatively for a gift in the very last sentence.

I have seen that letter a hundred times, even though repeated testing has shown that it does not work.

If you tend to overthink your audience when drafting your appeals, you should try a new kind of letter—and you just might see a dramatic improvement in the results of your fundraising efforts. I recommend throwing caution to the wind and writing a letter like you would to your closest friend—sharing your passion and your dreams, your hopes and your fears. Don't be afraid to create an appeal that is as different as possible from the typical organization-focused, polite, and tame update letter.

TELL ME A STORY

As a starting point, you can begin with the best story about your work, the one that you know that causes people to sit up and pay attention. It doesn't matter if you have already told this story a hundred times. Some of the best direct mail fundraising appeals have been mailed to the same donors every year for decades, and they work every time.

The letter should be as long as it takes to tell this story. Most good stories cannot be written in just four or five paragraphs on the front side of a standard sheet of letterhead. Don't be afraid to take more space to tell your story, whether it requires two pages or eight. Your story must also express a need—some reason why the donor's contribution will help make a difference. Many times, the biggest challenge in creating a strong fundraising appeal is to dig through all the success stories in order to find the one story where the goal has yet to be achieved and where the donor's help is still needed.

> **CREATE AN APPEAL THAT IS AS DIFFERENT AS POSSIBLE FROM THE TYPICAL ORGANIZATION-FOCUSED, POLITE, AND TAME UPDATE LETTER.**

MAKE IT PERSONAL AND SPECIFIC

Although your letter will be mailed to many different homes and offices, it will be always be a single individual who is opening and reading it. That means that you must make sure you have written your letter to that one person. Take out "we" and replace it with "I." Don't make your organization the subject in your sentences—make sure you are talking about real people doing real things. And take out any language that makes the recipient of the letter feel like a part of a large group. Don't say "good friends like you" or "our generous donors." The simple word "you" works better in most every case.

And finally, make sure you are asking for a specific gift repeatedly throughout the letter. A good fundraising appeal should have at least three asks for a gift of a specific dollar amount, and ideally more. A good rule of thumb (although not a hard and fast requirement) is to have a specific ask within the first three paragraphs of the letter and again at the bottom of the first page. You should ask again before the close of the letter, and then once again in the postscript.

When I make this recommendation, many people are taken aback. It seems pushy and rude to ask that many times for a gift, especially for a gift of a specific amount. But any fundraising expert will tell you that multiple direct asks in a fundraising letter increase response rate and gift amounts. This has been proven time and time again. The goal of a direct mail fundraising appeal is to get the donor to take action by sending a contribution. And you have a very high bar to cross to make it happen. You must convince the donors to take out their checkbook or credit card as they scan through their mail at the end of the day. If you do not say what you want them to do, the odds are that they won't do it.

In addition, any decision point you create for the donors increases the likelihood that they will not respond. Making the donors figure out the amount of their contributions is a good way to get your letter set aside and forgotten about. I have tested many different options in an attempt to figure out the best amount to ask for, and typically, the strongest performance is achieved by asking for the amount of the donor's highest previous contribution, along with several modest upgrade amounts. In some cases, you may be able to increase response by asking for the same amount as the donor's last gift, but this can result in a lower overall gift amount.

BECAUSE EVERY ORGANIZATION AND DONOR FILE IS DIFFERENT, TESTING IS CRITICAL TO DETERMINE WHICH FUNDRAISING MESSAGES SPECIFIC TO YOUR ORGANIZATION AND MISSION WILL RESONATE BEST.

THE PACKAGE: KEEP IT SIMPLE

I have learned that, in most cases, a very simple design and look for fundraising appeals works best. A simple number 10 envelope with no message on the outside has the advantage of being cheap and effective. The teasers that so many people insist on putting on direct mail envelopes most often reduce response rate unless they are expertly crafted. When in doubt, it is safer not to write anything on the outside of the envelope.

For the contents inside the envelope, you should use plain letterhead without a distracting design and as large type as you can fit on the page—ideally, 14 point or higher. The goal is to put as much focus on the story and the call to action within the letter and on the reply form. Several years ago, I recommended against using pictures on the letter form because they made it looks less personal. But my recent testing has shown that is no longer the case, probably because even holiday letters from your grandparents have pictures these days. If you do use pictures, make sure they support the story you are telling and have captions that encapsulate and retell the story of your appeal.

A reply form is essential, and it should be personalized to the donor with specific ask amounts that match those in the letter. Because you want the donor to notice the reply, you shouldn't be afraid to use garish colors or large headlines to capture attention. However, more than anywhere else, it is critical to use a clean, simple and intuitive design on the reply form once you have gained the donor's attention. You should avoid having multiple options or a cramped layout. A good practice is to print out a draft of reply form and give it to several people to fill out. They should be able to navigate it within seconds—easily figuring out which contribution they would like to make and then being able to choose quickly between giving with a check or by credit card. You can put a URL on the reply form to encourage the donor to give online, but most tests have shown that a miniscule number of donors will choose to use it.

Definitely enclose a reply envelope as well. Before you put your letter in the mail, make sure that the reply form fits easily into the reply envelope along with a check. If you can afford it, test applying a live first class stamp (or even better, multiple stamps of mixed denominations) to the reply envelope. This has proven to raise response rates as much as 50 percent and typically increases net revenue from recent donors who give $50 or more.

However, some donors find this presumptuous, so you should be prepared to honor their wishes if they let you know they prefer not to receive stamped envelopes. I've found that when you honor their wishes by no longer stamping their envelopes, they subsequently have higher response rates than any other segment. Business reply envelopes, however, do not pay from themselves, even if you add the "Your stamp on this envelope is an additional gift" message.

Additional inserts in the package only work if they are focused on supporting and expanding the primary call to action of the letter. It is a big mistake to put a general informational brochure in a fundraising letter. It will invariably reduce response rate by distracting donors away from the reply form and the ask.

Once you have put together this very simple direct mail package, you can begin to test incremental improvements to it. As a default, I recommend placing a priority on testing elements that add to the feeling of personalization to the letter. If you are pre-printing the letter, test spending the extra money to laser it, so that you can put in specific ask amounts and speak to the donor by name. If you are using a window envelope, test using a closed face envelope.

You can also test using actual handwriting on the letter or envelope, which can have a dramatic effect on response rates. Actual handwriting is one of the few immediate tip-offs that a human being actually touched the letter, and it makes donors pay much more attention to your piece of mail. Every time I have tested it, I've seen a handwritten note or message statistically improve the response rate of the effort.

You should avoid testing elements that will be costly and have proven not to have a significant effect on response rate or gift size. This would include testing different creative designs, paper stocks, or envelope sizes. Remember that many of the complex direct mail packages from larger organizations only make sense if your mail volume is in the hundreds of thousands or more.

That said, you should not be afraid to test, even if you have a very small file. You can accurately test and achieve statistically significant results even if the quantities in your control and test pools are in the hundreds. Because every organization and donor file is different, testing is critical to determine which fundraising messages specific to your organization and mission will resonate the best. Even if you don't statistically analyze the results, you can usually get a feel for what your donor file responds to best after several years of testing different treatments.

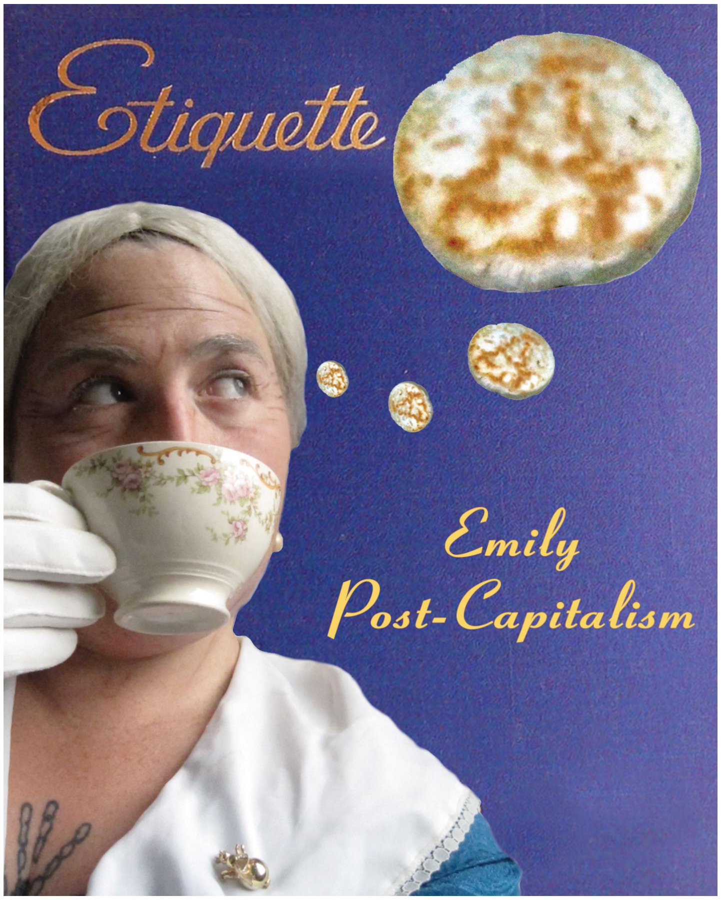
THE ESSENTIAL ELEMENTS OF AN EFFECTIVE APPEAL

To summarize, here are the essential elements of creating a strong direct mail fundraising appeal:

- A great story that conveys the passion you have for your cause—and the urgent need for the donor to offer support, without any of the language or jargon that distances you from the individual reading your letter.
- Multiple, specific asks for a contribution in the letter and on the reply form.
- A simple design that keeps the focus on the story you are telling and the ask for a contribution, while making it as easy as possible for the donor to respond.

As you can see, the best fundraising appeals are very simple. But it is a simplicity that is difficult to achieve. I encourage you to give it a try. ■

Peter Schoewe is a vice president at Mal Warwick | Donordigital, a direct response fundraising agency in Berkeley, CA. He has over 15 years of experience in direct response fundraising, with a focus on creating strategy built upon a foundation of strong analysis. Prior to joining Mal Warwick | Donordigital, Peter was the director of direct marketing at Mercy Home for Boys and Girls in Chicago.



Emily Post-Capitalism and the Revolutionary Etiquette of Crowdfunding

A conversation with Annie Danger by Ezra Berkley Nepon

CROWDFUNDING TOOLS LIKE KICKSTARTER, Indiegogo, and GoFundMe have quickly become popular tools for raising funds for everything from art projects to emergency healthcare to organizational budgets. While these tools can and do help people and organizations raise lots of needed funds, this interview explores the limits and ethical challenges of the fast-evolving medium.

EBN: Annie, you created a performance art character named Emily Post-Capitalism. Can you tell me about her?

AD: I was invited to participate in an annual event where people open up their homes as theaters. I had been thinking a lot about revolutionary etiquette. Etiquette is usually defined as a loose code of social cues aimed at creating a welcoming space. Etiquette as we perceive it nowadays can reinforce oppressive dominant paradigms, but at its heart, there is an understanding that if we make some agreements, we can move forward as a group. And in theory, making people feel welcome is a big part of traditional etiquette.

So how do we make people feel welcome in the movement, in revolutionary work, in really changing this world in the drastic ways that it needs? Revolutionary etiquette! I thought we should have some prim and proper revolutionary lady teaching about it, and Emily Post wrote the book on etiquette. So why not have Emily Post-Capitalism take the new mantle?

For the piece itself, I would make crumpets from scratch. I'd get out a lot of doilies and lace, and I would dress as Emily. People would come in, and we would just have conversations on revolutionary etiquette. When it started, there was this character, Emily, but I realized pretty quickly that if I remained in character I was holding power in the conversation that I felt wasn't useful toward the goal of productive dialogue. It wasn't helping the group conversation move forward or increasing everyone's agency. So I stopped being in character and just started being in costume.

EBN: In the spirit of those conversations, let's talk about the need for revolutionary etiquette around crowdfunding. I was inspired to ask you for this interview because of a very lively and insightful Facebook thread you initiated by asking questions about the lines between projects that are and aren't ethically appropriate for an online public crowdfunding campaign.

AD: It's pretty recent that we've started seeing crowdfunding for anything and everything. I have this conversation with a lot of people because we see campaigns come up that we react to with… "really?!" It brings up all of these feelings, and if you sort them out, you realize that on an emotional level, crowdfunding campaigns often read as asking people to assert your project's legitimacy. Which leads directly to wondering if these projects are legitimate. We live in a capitalist society, and money is intense, important, painful, and necessary—and rarely given away without strings attached. So when it is given away, that carries a lot of meaning: If you're donating to something, it must be exceptionally important. And the language of crowdfunding follows suit, claiming urgency and importance for anything and everything that is being funded. Emotional dissonance arises when something that is clearly not massively important is asking for a valiant marshaling of community resources (especially when those communities have mixed class backgrounds).

EBN: In the online conversation, you asked, "How can we approach crowdfunding in a way that takes account for the fact that it is inherently racist/sexist/classist/(dis)ableist because it functions on cultural capital and our cultures and subcultures are all of those things?" Given that people with access to privilege are more likely to have access to the social capital that drives success in this medium, are there revolutionary etiquette issues to consider before launching or supporting crowdfunding campaigns?

AD: The tone and constituency of crowdfunding are both communal, and I feel that this means we must crowdfund for projects that are in some way also communal—meeting a certain threshold of "for the greater good." I find it offensive when campaigns seem to be personal whims for art that doesn't seem to be particularly transformative or for someone's popularity fun-time project. When people are outraged by online fundraising, I think they're asking, "Why is that important enough for this request for collective support?" For instance, there is a website whose focus is almost purely glamour and culture around trans masculine identity. They ran a $20,000 Indiegogo campaign to alter their website, received $23,000, refused transparency in their accounting, and produced an updated website nine months later which used a $159 Wordpress theme (not even customized!). Those resources are coming from a community with limited means and lots of real difficulties around social justice. So….really?!?!

I mean, let's be clear: Individual crowdfunding can be really important in our communities. Pretty much any time a broke person is trying to fund something for their kid, I feel receptive. I've also encountered lots of people who feel very strongly that medical things should not be crowdfunded and an equal number who seem to think that medical things should always be crowdfunded. For example, a friend of mine who is low-income and enduring a major health crisis is doing a relatively low-goal campaign for one of his kids to attain an important educational opportunity. I think this campaign should be getting way more support. It doesn't necessarily benefit the entire community, but it is a communal action to give to this. It's about a community benefiting a person in a way that, in theory, communities should.

EBN: You and I have talked about situations where we felt it necessary to keep fundraising out of the public sphere and instead rely on calling or emailing people in our networks personally and asking them to donate. Would you share an example of this kind of etiquette decision?

AD: Last summer I was involved in a group that wanted to get a paid float slot in the San Francisco pride parade, which is attended by millions of people. The idea was to use one of the large shuttle buses the major tech companies are using as a shadow transit system across the Bay Area and glossy, professional banners and props as a Trojan horse to address displacement and gentrification in a way that sparks productive public discussion.

It was going to cost around $2,000. At one of the meetings, some people said, "Okay, so we should crowdfund this!" and there was a collective "wait a minute" instinct. We had a good conversation and couldn't really guarantee raising $2,000 for this action would do more good than just giving those funds to some organization that actually works to stop evictions. We came to two important points: One is that we would not turn this into a campaign encouraging everybody give us white people (it was a mostly white group) money to go print some unnecessarily expensive and professional banners, rent a bus, and pay to get into the parade and be like, "Look at us!" That felt completely unethical. But the action felt useful enough to do, so we came up with a compromise: we set up an Indiegogo, but we kept it private. It wasn't publicly listed; we just sent it around to specific people. The second point we agreed on was that regardless of how we got the money, if we were marshaling those resources, we felt we had to work in collaboration with other groups so that we were accountable to a slightly greater community responding to the housing crisis in San Francisco. This didn't fully address the ethical questions about these high-cost expenses, but it mitigated the impact on the larger movement.

EBN: Josh MacPhee raised issues of labor ethics in his 2012 article, "Who's the Shop Steward on Your Kickstarter?" He points out that we are providing real labor that raises funds for our campaigns, and that labor also raises significant money for the corporations that run these sites. One of the critiques of crowdfunding that resonates with me is that the proliferation of these campaigns often feels like poor people are passing $10 back and forth, but each time we pass these funds, $1 leaves our community and goes into corporate wealth. Our generosity and our networks of mutual aid are put to work for profits. Are there other fundraising platforms that are less about bolstering corporations?

AD: We all used to throw fundraisers. Actual events where people would come and meet other people face-to-face, have a social engagement, and build up our movements and communities. That money would still be coming from our own incomes, but it wouldn't be paying out to anyone except the intended beneficiary. And the fundraising event would have a social and community benefit beyond the money raised.

You have to have enough social capital to make a rent party work if you want to pay your rent that way, but it's not just social capital. The thing about the internet is that it distills social capital into actual money. So while you might need social cache to throw a rent party or a benefit for your kid's soccer team, you are actually participating in something larger. And maybe that's what creates political and emotional dissonance when crowdfunding a project that doesn't seem very communal. We're just monetizing social capital, monetizing our culture. That's a very disturbing thing about the internet—that socially interacting and loving each other becomes a way of commodifying each other.

PEOPLE DONATE BECAUSE THEY BELIEVE IN A CAUSE OR HAVE A CONNECTION TO THE PEOPLE RAISING MONEY, NOT NECESSARILY BECAUSE THEY HAVE LOTS OF MONEY TO DONATE.

EBN: In this moment, crowdfunding is being used to try to meet the needs created by the dismantling of public resources for healthcare, education, housing, and other basic issues as well as the lack of funding for creative and artistic work. For me, it raises a question about how grassroots fundraising, a model based on many people giving, can respond to the needs of people who don't have wide social networks or networks with varying income levels?

AD: My brain immediately says "Create a fund! Like, a big one!" People could donate to the fund knowing the general criteria for projects that it supports and have the option of earmarking for specific types of projects. People with a potentially-fundable project could apply to the fund and become funded through a peer-review or other just process. Not unlike Bread and Roses or similar social justice funding organizations, but for a wider array of projects and needs. I would think of this as a necessary maturation of the culture of crowdfunding. It's here to stay, so let's talk about how to do it best.

EBN: Right, so that people who care about something widely can support it, even if we don't know the individual. Which brings us back to the missing social safety net. When I get frustrated about a lot of the individual fundraising campaigns I see among my friends and networks, I'm not mad at people for asking for help. I'm mad that I don't know of any collective way to meet all these needs. So only the people who can talk themselves into "deserving" it and have wide networks with expendable income can access it. In theory, though clearly not in practice, we pay taxes in order to ensure collective access to resources like public education, parental leave, and other basic needs. As more and more elements of the social safety net are cut or dismantled, we are all trying to figure out workarounds, and this one is inaccessible for many people.

AD: I think the only times I've ever been mad at people for crowdfunding is when the project feels like it's beyond the realm of asking for help that you really need. And some of that anger is my own perception of scarcity, knowing that there are people who really need the money. I fear people think about crowdfunding as an opportunity for free money. I mean, if you're not a huge Nonprofit Industrial Complex organization, it's often way easier to crowdfund a full budget than throwing a bunch of benefits or writing a bunch of grants.

I think the hook of crowdfunding is that there's a secret capitalist glee in "free money." For a lot of people, intentionally or unintentionally, there's this promise involved in crowdfunding that it is a workaround to the pains of capitalism. But crowdfunding's "free money" is actually coming from a mass of specific individuals who do or do not have access to a fair amount of money. Statistically, people donate because they believe in a cause or have connection to the people raising money, not necessarily because they have lots of money to donate. To view crowdfunding as a low-input, high-output income stream is exploitative, in my opinion. Crowdfunding is not just another source of income. There are people behind those dollars and they are people within the beneficiary's community. The line between mutual aid and easy scam is very fine when the anonymity and commodification of the internet are at play, but the line is there nonetheless.

EBN: There has been much public discussion about questions of accountability once funds are raised. Many of us have donated to something and never received the "perk" we were promised. Large sums of money are channeling through these mediums with very little oversight. What are the revolutionary etiquette issues that come up here?

AD: There is a responsibility to be very transparent about accounting when you're asking tons of people for money for a project that is Important For The Community. I think that is a basic ethical mandate because money is so tricky. People often feel a little attacked or defensive when asked for their accounting after a crowdfunding campaign because they feel like, "I'm not stealing your money!" For many people, it also brings up a dynamic in other forms of charity where you can have resources you need—for free— but only if you constantly prove and re-prove that you're not a criminal. Look at how intrusive the surveillance state has become for welfare recipients. But it doesn't have to be like that. You can be transparent because you're acting with integrity.

It's important to share income and expense budgets in advance, and then, again, be transparent about how you spent the money. No one ever reports on how crowdfunding money was spent, but we should.

I also think the detachment inherent in internet-only fundraising exacerbates many of these issues. Certainly this can show up regarding "perks." I have never received a perk for a donation and (full disclosure) only sent out about half of the ones I owe. The thing is, though I feel terrible about not getting perks out, I, and many people I know, have a mixed history of actually receiving the promised perks. I think that says something about what's going on when people donate.

EBN: The IRS hasn't quite caught up with crowdfunding in terms of regulation. The fear of getting busted for not doing the thing you raised money for is less present with this medium than with a traditional business venture or foundation grants. Our internal integrity sensors have to drive us to ethical behavior here, which is a great example of revolutionary etiquette.

Let's talk a little more about the role of the internet, and internet culture, in this specific fundraising model. In the conversation on your Facebook thread, you asked, "Can we accept crowdfunding as a new constant in our lives and move away from emergency language/hierarchy of perceived importance and toward an understanding of this phenomenon as an organized tool for strengthening our communities?" Can you say more about that?

AD: The marshaling of community resources for this important thing is using the constant crisis language that comes out of internet sensationalist culture, right? We might as well be Buzzfeed. And that, I think, springs from the commodification of attention. It's real—people make money off attention, off the number of clicks that something gets. I find this disturbing, but I always look to the points of potential in any situation. What could it look like to shift how we interact with internet donations? What could it look like to write our own, radical platform for fundraising that accounts for all these ethical issues? From what other sectors/strategies/tools can we take lessons as we define a better way of doing this? Because it's likely here to stay.

EBN: I think it's cool that with crowdfunding we get to see each other collectively supporting the organizations and projects we love. There's often a perception that a few rich people outside of the community are giving privilege-guilt money, when the reality is that it's a wide range of mostly low and middle-income people. Lots of people of color, lots of queer and trans people, lots of people who value the work for connected reasons. We don't often get to witness that outside of the context of these public campaigns.

AD: I agree with that to an extent (though I rarely, if ever, look at the list of who else has donated), but a cynical part of me wonders if we are living in a culture where we're just silently witnessing, which is hardly witnessing at all. Has this devious placebo of the internet taken the place of more meaningful action? If so, that's not crowdfunding's fault, it's bigger than that.

When we're hustling in all of the million ways we know how to get money to people and projects who need it, that need is almost always for systemic reasons. It's so impossibly rare that someone would lack necessary resources for any reason that is not oppression in some way. And if I let myself think about it, it's so easy to tap into the fury of, "Why are we having to do this? You screw us over all the time and we're hustling to pay each other money we don't have, to fix the problem you caused and that you won't help us fix!" That's an outrage that I think is maybe less visible with the internet, both because the internet is a pacifying device—it's click and forget—but also because it is less effort. So I think there's less investment in all directions. And that makes it harder to notice how hard we all work to cover our a**es and solve intense issues that are created by the system. That's just one of the invisible outrages of this society that if people really stacked up, made a list about, and tapped into the gravity of it all, our outrage would break loose!

This conversation raises questions about how we, as fundraisers concerned about social justice, can build a shared understanding of the uses and limits of crowdfunding. What are our expectations of each other regarding the tension between individual and collective needs? What level of income and expense transparency is required in this fundraising medium? While we use the tools available to us, can our clarity about their limitations help us to imagine other models that truly undermine inequality? ■

Annie Danger is a working performing artist stationed in the San Francisco Bay Area. She is a trans woman born and raised in Albuquerque, NM. Danger has 17 years experience fundraising for nonprofits, activist projects, and personal endeavors. She was the financial manager of Modern Times Bookstore Collective, a 43-year-old leftist book project in San Francisco. For more information on her work and art work, find Annie at anniedanger.com

Ezra Berkley Nepon is a Philly-based writer, performer, and fundraiser. Currently working at William Way LGBT Community Center, Nepon was previously director of grassroots fundraising at Sylvia Rivera Law Project, where they co-wrote the report *From the Bottom Up: Strategies and Practices for Membership-Based Organizations*. For more info: ezraberkleynepon.wordpress.com

Jump-Start Your Fundraising with Prospect Research

By Armando Zumaya

HAVE YOU EVER SEEN THAT OLD TV SHOW STARGATE? If you aren't familiar with it, the Stargate is a space portal/door that allows characters to travel between dimensions and planets. I have spent my career going through the fundraising version of Stargate. I started out in the mid-1980s with a clipboard in my hand and beads around my neck, knocking on doors for the peace movement. Years later I was on the opposite end of the spectrum, working at an Ivy League college on $1 billion fundraising campaigns.

I have also crossed into the world of prospect research while being a development officer. I conduct many trainings to teach fundraisers and prospect researchers to work better together because I know both worlds. I have seen small grassroots organizations with a few fundraisers working with a prospect researcher identifying new major donors. When working in this way, these small groups are much more dynamic, nimble and effective than a large institution. This is the hidden advantage most folks in the grassroots fundraising community don't grasp: They are actually better at using prospect research than larger institutions.

Why Spend Money on Prospect Research?

First, you cannot fundraise without great prospect research. Let me stick my neck out and say that most fundraisers in smaller nonprofits waste too much time on too little money. They spend most of their time on high maintenance, low dollar foundation giving. Individual major giving commonly covers 75 percent of fundraising revenue nationally coming into nonprofit coffers, yet most small or medium nonprofits crowd at the foundation's door, pushing and shoving. Your time might be much better spent on focusing on researching prospective and current individual donors. Within the group of $20 donors there is often someone writing $10,000 checks to other institutions; you just don't know it. Put your efforts into your pipeline of individuals, annual and major donors.

One of the challenges we are up against in grassroots organizations is our disgust with money. Only grassroots nonprofits have this conflict. We hate money, yet we need money. Money is power, and more than ever that power needs to be on the side of our causes, which are righteous, just and beautiful. Even dirtier in some minds is prospect research, which is often seen as digging into personal lives, diving into dumpsters, and violating people's privacy. On the contrary, prospect research relies only on public information and has strong ethical guidelines.

Bringing Prospect Research into Your Organization

You can do prospect research in a variety of ways. One way is to hire a trainer who is a prospect researcher to train you or a staffer/volunteer you select. This sounds like a cheap alternative to hiring a freelancer to do the research for you, but the hidden cost is your time. You can find yourself spending a great deal of time doing the research when your role should be going out and having meetings. A more efficient way is to hire a freelancer to do a project for you on a regular basis or monthly retainer. That way you can make specific research requests such as, "I need all the donors who have given over $5,000 to women's reproductive rights and immigration issues in the metro Washington, DC area." You get a list and contact information, maybe 10 names, maybe 400. When you begin working from that list, you're already halfway to a gift because you're talking to the right people.

You can also hire a full- or part-time prospect researcher. I try not taking a job unless the group has some sort of prospect research staff, usually a full-time staffer. If you have a staff of three or more field fundraisers, you need a full-time prospect researcher.

When you are able to show that prospect research has paid for itself with your first new gift, ask for more resources from your leadership for prospect research, tools or staffing. Emphasize to your board and boss that if you're not prioritizing prospect research, other groups will be able get to your potential donors first. A big university with a team of nine prospect researchers will identify that new wealth in your community and dispatch a skilled fundraiser from the right area to go meet with them. They will work on that person for a large gift, which could have been your organization's gift—a game-changing gift. This happens all the time; I have done it. Small and medium grassroots groups need to understand this is a basic investment in fundraising and not a luxury.

Getting Started Prospecting

1. Create a Review List.

Once you have conducted your prospect research, start by creating a simple "review list" from your researched list. Your list will be full of addresses, notes, financial information, etc. Leave off all the financial information, and only write a list of names. Don't hand it out or email it. Since you have worked hard to research a list, giving it out is giving out your leads. It might end up with other organizations that are fundraising too.

Having a great list doesn't mean it will be easy get an appointments with promising prospects. Often, great prospects are people that everyone in the business and nonprofit world want to talk to and are not easy to reach. This is the aspect of prospecting rarely talked about. Simply reaching people is a special skill. I do a lot of training about this and have found that it can be learned.

2. Go over the list with your contacts.

You can begin to overcome some of the obstacles of reaching prospects by going over the review list with board members, donors, politicians, staff, former staff, friends, or anyone who can get you in the door with the prospects. Good prospect researchers can also help you in advance by telling you who your people know on the new list. Board members often won't even realize they have valuable connections for you. I have seen organizations with small budgets find a few new donors whose gifts were game changing for them.

3. Share and practice with your fundraising team.

It's a good idea to be in touch regularly with your fundraising team as you prospect—sharing best practices, what is and isn't working, what is aggravating, and who are you stuck on. Practice with each other; do role-plays to hone each other's skills. Teams that practice with each other and create safe transparency around prospecting do much better than when fundraisers suffer in silence. Someone could have a technique or trick they are using that is helping them get appointments, which they should share with their colleagues. I call this a "Professional Learning Community," or "PLC"

4. Create a script.

You will also want to create two types of scripts you can use with prospects, one verbal script and one for email. On my computer, I have saved a few sentences that describe my organization in the most compelling, clear and descriptive way possible. These are descriptions that have worked well in the past. Saving these descriptions allows me to not have to sit there trying to remember what I said in the past that worked so well. I also have some email templates saved in LinkedIn's format. I then edit them so they are relevant, but they are 90 percent already written. You can share your scripts and templates with colleagues.

5. Cold call. A lot.

I only send an email to a prospect after I have tried phone calling. I don't recommend sending emails or letters in advance asking for an appointment. Pick up the phone.

You will need lots of prospects to call, which hopefully you have after your research. Sometimes I can make 30 phone calls and talk to only two live people, leaving lots of voicemails in between. I usually leave a voicemail on the first call. Wait a few days and then call again at a different time. Sometimes I vary the phones I use and go between my cell phone and landline, blocking caller ID.

6. Befriend the assistant.

If you reach an assistant, try to befriend them. It is crucial you get buy in from assistants just like he or she is a prospect. Many assistants will become advocates for you if they understand why you are calling their boss and that you are doing good work. Few people will call you back, so you need to keep calling till you talk with them or are told "No thanks." Make it easy for an assistant to get rid of you. You're not some pushy salesperson. If they are not interested, that's fine; spend your time on someone who is.

6. Send an email eventually.

After the second call attempt, I will generally send an email. If you don't have an email address, ask if you can send it to the assistant so they can forward it on. Spend some time working on the email so it has a compelling hook. Watch for internal lingo, wonk language, and abbreviations. Write it assuming they will read two sentences, so you have to get their attention quickly.

7. Be clear on your goals for the call—and get the meeting.

Once you get your prospect on the phone, and you will, be ready to go. Your goals for this call are to show you are friendly and working on something they are interested in, and, above all, to get an appointment. Always just request a 30 minute meeting. Don't try to tell them the whole story of your organization on the phone or try to convince them it's a good cause. If you did your research and describe your organization well, there should be some interest. Here's a sample script: "Ms. Sanchez? Hi, this is Armando, I work for ______________. I am working to build our outreach in Oakland and the East Bay. I have seen you active and leading on our issues, and I thought it would be great to orient you to our work, at the very least so you know about it."

Usually, getting a meeting is a matter of scheduling. When that comes up, you have way more control than you think. If the prospect is in your town, then ask them when they could take 30 minutes to learn about your organization. Don't dictate your schedule. It may be five months from now, but you will likely get the appointment.

8. Be prepared to respond to "Nos."
Catalog the common "Nos" you get, and write down perfect responses. I call this "Es and Rs," or Excuses and Rebuttals. For example you might hear, "I am over committed with such and such cause…" What is your ideal response? Write them down, improve on them, and share them with your fundraising team. With practice, your phone skills will improve, and before their excuse not to meet with you finishes leaving their lips, you're already back with a perfect response.

Next Steps

Are you ready to move forward in working to prioritize prospect research in your organization? Here are a few concrete next steps you can take that will help get you there.

1. Write a "Case Statement" for your board and executive director that makes the case for prospect research in your organization. Know the expense involved: full-time and/or part-time staff, freelance researcher, or training for yourself. Set realistic expectations for them.
2. If you have questions, join APRA (aprahome.org) and read APRA's blog, Prospect L (http://listserv.apra-prspct-l.org/wa.exe?A0=PRSPCT-L). APRA has thousands of researchers in its professional learning community who are kind enough to answer questions on Prospect L everyday. It is also a great place to ask for RFPs for freelance prospect researchers.
3. If you want to hire a trainer or a freelancer, reach out to me at aez2@hotmail.com or ask on Prospect L.
4. Create a professional learning community in your fundraising team, even if it is only two people.
5. Do it, call it, work it. Accept the failures and frustrations, and keep going. In all that rejection you will find gems for your organization. Hit some homeruns!
6. If you have questions, don't hesitate to write me at aez2 hotmail.com. ■

Armando Zumaya is vice president of fund development at BRIDGE Housing Corporation.

Grassroots Fundraising Journal

A Publication of GIFT

1904 Franklin Street
Suite 705
Oakland, CA 94612

ADDRESS SERVICE REQUESTED