

# Launching a Fundraising Program: From A to Z

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## *Fundamentals*

- What is your mission statement?
- What is your vision statement?
- Do those statements resonate with the community or do they need work?
- What values do staff and volunteers in your organization share?
- Have you conducted a community needs assessment and a SWOT (Strengths, Weaknesses, Opportunities, Threats) analysis?
- Do the strengths you see internally match the strengths the community sees?
- Are you providing the right services to your community?
- Do your communications relate to what your community assessment is telling you?
- Does the board understand its roles and responsibilities, especially relating to Fund Development?
- Is your strategic plan current?
  - Do you refer to it often?
  - Is it a living document or is it gathering dust?
  - Is fundraising a part of your strategic plan?



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## ***Board Readiness***

- When talking about this organization, do you use words like “we,” “us,” and “our” versus “you” and “your”?
- Why were you recruited to serve on this board?
- How do you help this organization fundraise?
- Do you donate money to this organization?
- Do you donate money to other organizations? Where does this organization fit in your priorities for charitable giving?
- Do you talk about this organization with coworkers, friends, and family?
- Write down your favorite client story that happened at this organization.
- Do you know the names of five donors? Have you met those five donors?
- How many donors have you thanked with a card or phone call?
- How many donors have you introduced to the organization?



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## *The Donor-Centric Pledge*

We, [fill in the name of your nonprofit organization here], believe...

1. That donors are essential to the success of our mission.
2. That gifts are not "cash transactions." Donors are not merely a bunch of interchangeable, easily replaceable credit cards, checkbooks and wallets.
3. That no one "owes" us a gift just because our mission is worthy.
4. That any person who chooses to become our donor has enormous potential to assist the mission.
5. That having a program for developing a relationship with that donor is how organizations tap that enormous potential.
6. That we waste that potential when donors are not promptly thanked.
7. That "lifetime value of a donor" is the best (though often overlooked) way to evaluate "return on investment" in fundraising.
8. That donors are more important than donations. Those who currently make small gifts are just as interesting to us as those who currently make large gifts.
9. That acquiring first-time donors is easy but keeping those donors is hard.
10. That many first-time gifts are no more than "impulse purchases" or "first dates."
11. That we'll have to work harder for the second gift than we did for the first.
12. That a prerequisite for above-average donor retention is a well-planned donor-centric communications program that begins with a welcome.



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## *The Donor-Centric Pledge (cont.)*

13. That donors want to have faith in us, and that it's our fault if they don't.
14. That donors want to make a difference in the world-- and that our mission is one of many means to that end.
15. That donors are investors. They invest in doing good. They expect their investment to prosper, or they'll invest somewhere else.
16. That we earn the donor's trust by reporting on our accomplishments and efficiency.
17. That individual donors respond to our appeals for personal reasons we can only guess at.
18. That asking a donor why she or he gave a first gift to us will likely lead to an amazingly revealing conversation.
19. That fundraising serves the donors' emotional needs as much as it serves the organization's financial needs.
20. That we are in the "feel good" business. Donors feel good when they help make the world a better place.
21. That a prime goal of fundraising communications is to satisfy basic human needs such as the donor's need to feel important and worthwhile.
22. That the donor's perspective defines what is a "major" gift.<sup>1</sup>
23. That every first gift can open a door to an entirely new world for the donor, through participation in our cause.

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<sup>1</sup> A repeat donor of \$25 annual gifts who suddenly increases her gift ten-fold to \$250, for instance, is making a major commitment that deserves special acknowledgement.

©Ahern and Joyaux. From *Keep Your Donors: The Guide to Better Communications and Stronger Relationships*, by Tom Ahern and Simone Joyaux (John Wiley & Company Publishers, November 2007)



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## A Donor Bill of Rights

*PHILANTHROPY* is based on voluntary action for the common good. It is a tradition of giving and sharing that is primary to the quality of life. To ensure that philanthropy merits the respect and trust of the general public, and that donors and prospective donors can have full confidence in the non-for-profit organizations and causes they are asked to support, we declare that all donors have these rights:

### I.

*To be informed of the organization's mission, of the way the organization intends to use donated resources, and of its capacity to use donations effectively for their intended purposes.*

### VI.

*To be assured that information about their donations is handled with respect and with confidentiality to the extent provided by law.*

### II.

*To be informed of the identity of those serving on the organization's governing board, and to expect the board to exercise prudent judgment in its stewardship responsibilities*

### VII.

*To expect that all relationships with individuals representing organizations of interest to the donor will be professional in nature.*

### III.

*To have access to the organization's most recent financial statements.*

### VIII.

*To be informed whether those seeking donations are volunteers, employees of the organization or hired solicitors.*

### IV.

*To be assured their gifts will be used for the purposes for which they were given.*

### IX.

*To have the opportunity for their names to be deleted from mailing lists that an organization may intend to share.*

### V.

*To receive appropriate acknowledgement and recognition.*

### X.

*To feel free to ask questions when making a donation and to receive prompt, truthful and forthright answers.*

#### DEVELOPED BY:

Association of Fundraising Professionals (AFP)  
Association for Healthcare Philanthropy (AHP)  
Council for Advancement and Support of Education (CASE)  
Giving Institute: Leading Consultants to Non-Profits

#### ORIGINALLY ENDORSED BY:

Independent Sector  
National Catholic Development Conference (NCDC)  
National Committee on Planned Giving (NCPG)  
Council for Resource Development (CRD)  
United Way of America

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*What dreams are donors living out  
by contributing to your mission? (Altruistic? Selfish?)*

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*Agency Assets*

*Fundraising Assets*

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## *Identify the Predisposed*

Characteristics	Type of People	Shared Values	Disconnects	Where are They
Hobbies				
Passions				
Vocations				
Political Views				
Married/Single				
Children				
Children's Interests				
US Born/Immigrant				
Religious Affiliations				
Friends of Staff, Board or Volunteers				
Connected to Similar NPOs				



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## ***Questions for Donors***

- Are you involved with other nonprofits in the community?
- What are your philanthropic priorities?
- What do you already know about our organization?
- Have you ever visited our site? Can I offer you a tour?
- Tell me more about your company/business/work?
- Would you be interested in volunteering?
- Can I send you more information on our work?

## ***Deeper Questions for Donors***

- What would you change?
- How do you picture the future?
- Who set an example of generosity for you?
- What is the best gift you've ever given? – why?
- Who were your heroes growing up? Now?
- If you won the lottery, how would you spend your time?
- How do you want to be remembered?



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As Is:

Should Be:

Fill the Gap:

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## *Bad Fundraiser vs Good Fundraiser*

Fundraiser A: "What's the most important thing about the environment to you?"

Donor: "Well, I think environmental damage is a pretty big problem. We're hurting the environment forever and we don't even realize it!"

Fundraiser A: "Yeah, you're so right! That's why you should donate to our awesome program. It is so important! I'm going to tell you all about it...blah blah blah blah blah... Will you donate?"

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Fundraiser B: "What's the most important thing about the environment to you?"

Donor: "Well, I think environmental damage is a pretty big problem. We're hurting the environment forever and we don't even realize it!"

Fundraiser B: "How interesting!" [shut up]

Donor: "... yeah! It's really crazy. In fact, the other day I was thinking about when I was a kid and would go out and look at the stars in the country and see meteors and all kinds of awesome stuff. But now that the city is so big, and there's so much light pollution and smog, when I go out with MY kids to our cabin we're lucky to see anything. It's so sad."

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## Strategies/Tactics

Goal #1:

Strategy #1 - Describe one strategy you will use to accomplish this goal:

Target audience:

Team:

Steps:

Timeline:

Cost:

Projected Income (gross):

Total cost (staff time, consulting services, design, printing, postage):

Net income:

Outcome:

Strategy #2 ...

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