A Fundraising Workshop

for Atlantic Canadian
Environment and Health organizations

prepared for

Environment Canada and Health Canada

Strategic Vision
Development Counsel

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Fundraising Workshop

presented by

Strategic Vision Development Counsel

on behalf of

Environment Canada & Health Canada - CAP

- **Which of these methods are we in a position to use? Why? Why not? What do we have to do to prepare ourselves to use any of the other Fundraising Methods?**

- **This Information Package - tries not to duplicate materials you're being given. Includes Sections on areas which are often asked about. Charitable Status note.**

- **'Apologia'**

- **Methodology & Technique - WHAT & the HOW (not Whether or Why)**
  - Much borrowed from business practices

- **Considerations:**

  Ethical
  Standards within the field +
  Broader Personal/Group
  Principles & Belief Systems
  Philosophical
  Privacy
  Ideological

- **Moral Dilemmas**

- **To raise funds, one way or another, you've got to *ask* for money.**

- **The cautionary note:**

  Workshops bring a specialized focus from a particular perspective

  World is viewed only through that day's particular filter.

  Narrowing our focus today to look at things primarily through the fundraising lens.

Fundraising Methods, Means and Sources

Methods of Fundraising

- **Advertising & Coupons**
  Media, In-store, Outdoor Advertising, Inserts
  Round-it-up, % of proceeds @ Point of Sale, $1 extra to…, etc. Options

- **Appeals**
  Annual, Seasonal, Special

- **Barter, Discounts, Loans & Co-Ventures**

- **Businesses**
  Sheltered Workshops
  'Ethical Product' Wholesale or Retail Sales or Service

- **Campaigns**
  Annual, Capital, Special

- **Canvassing**
  Door-to-Door, On-the-Street, As part of Events

- **Cause Marketing**

- **Contracts, Commissions & Fees for Service**
  Consulting, Research, Courier, Delivery, Other Services

- **Dedicated Charity 'Days' - 'Weeks' - 'Months' - 'Year of'**

- **Direct Response Marketing**
  Direct Mail
  Telephone
  Videotapes
  Audiotapes
  Television/Telethons
  Radio Appeals
  Door Drops

- **Endowments**
- **Foundation Applications**
- **Gaming**
- **Gifts-in-Kind**
  Equipment, Goods, Services
- **Government**
  Contracts, Gifts-in-Kind, Grants, Tax Exemptions
- **In-House Organizations**
  Auxiliaries, Donor Clubs, Guilds, Memberships, Support Groups
- **Investments**
- **Partnerships**
- **Planned Giving**
  Present Gifts:
  Cash, Certified Cultural Property, Interest Free Loan, Life Insurance Policy, Real Estate, Securities, Tangible Property
  Deferred Gifts:
  Charitable Bequest, Charitable Gift Annuity, Charitable Remainder Trust, Life Insurance Proceeds, Residual Interest
- **Product Sales**
- **Publications**
- **Special Events**
  Adventure Experiences, Advocacy, Aesthetic Experiences, Anti-'X', Athons, Attempts to Break or Set Records, Auctions
  Balls, Banquets, Be 'X' for a Day, 'Bees', Benefits, Bingos*, Board Game, Body Painting, Bonspiels, Books, Breakfasts-Lunches-Dinners
  Calendars, Cards, Carnivals, Car Washes, Casual Days, Challenges, Cleanups, Clubs, Collections, Competitions, Concerts, Contests, Cooking, Corporate Involvement

Dances, Demonstrations, Displays, Door-to-Door, Draws, Drives, Dunk Tanks
Eating, Education, Ethnic Cultural Celebrations, Exchanges, Exhibitions, Exhibits, Exotic Experiences Fairs, Fashion Shows, Festivals, Films, Fitness-related, Flea Markets, Fun-Days
Galas, Games, Games of Chance, Garage Sales, Gardening-Growing, Graffiti
Hair-related, Hauntings, Have 'X' experience with 'Y' Person, Hunts
Karaoke, Kidnaps
Late-to-Work Dues, Learn-How-To, Lotteries
Make-Something, Matches, 'Measurement' Opportunities, Mock Jails, Murals, Mystery
Nature Experiences, No-Show or Non-Events
Openings, Open Houses
Participate in 'X', Parties, Plant a "x", Plays, Premieres, Preserving, Prize Packages, Pub Crawls, Raffles, Rallies, Raves, Recipe-related, Recycling 'X', Rent a 'X'
Quizzes
Races. Roasts, Runs
Safaris, Sales, Scavenger Hunts, Sculptures, Seasonal, ShaveOffs, Shows, Silent Auctions, Skate Experiences, Ski Experiences, Societies, Speaking Engagements, Special 'X' Matinees-Mornings-Days-Evenings-Nights-Weekends, Swaps
Tastings, Theatre, Thematic, Tournaments, Tours, Treasure, Trials
Vigils
Walks, Watching 'X', Weight Loss, Wishing Wells
As well, 'Layered', 'Mixed' or 'Multi-textured' Events, where a number of these are combined to afford several opportunities for the organizers to gain revenue from attendees

- **Sponsorships**

  Cause-, Event-, Item-, Conference-, Capital-, etc.-Related Ventures
  Affinity Cards

- **Tax Advantaged activities & Tax Writeoffs**

- **United Way**

- **Workplace**

  Campaigns
  Privilege Programs: Casual Days, Flex-Time Arrangements, Late-to-Work Dues
  Payroll Deduction Programs

Sources of Resources

- **Individuals**
  - Friends of...
  - Public - General & Targeted Constituencies
  - In-House: Present & Past Staff, Volunteers, Alumni, etc.
  - People who Benefit from your Service: Present & Past
- **Agencies & Other Not-for-Profits**
  - Grants, Gifts, Services, Counsel, Equipment, etc.
- **Companies & Suppliers/Vendors**
  - Small
  - Medium
  - Large
- **Educational Institutions**
- **Foundations of various kinds**
- **Government Grants**
  - Municipal
  - Provincial
  - Federal
- **Media Organizations**
- **Police & Fire Departments**
- **Political Organizations**
- **Professional Associations**
- **Religious Institutions**
- **Service Clubs**
- **Unions**

Strategies, Reminders, Reasons and Thoughts

Before fundraising, it's worthwhile knowing why you're doing what you're doing. What are your fundraising goals? What are you trying to accomplish through your fundraising?

In the U.S., Mal Warwick has identified "Five Fundamental Fundraising Strategies":

Stability **Are you taking the right steps to ensure your organization's long term survival?**

Efficiency **Are you raising money at the lowest cost per dollar raised?**

Visibility **Does your organization's work require broad-based public support? Are your fundraising efforts trying to keep you in the public eye? Do they convey the image you want?**

Involvement **Are your donors involved as deeply as they wish to be in your activities? Do they feel adequately informed, and welcome to take part directly in some of what you do?**

Growth **Is your fundraising revenue increasing at a fast enough pace to support the growth your organization wants?**

Warwick believes these strategies are most often mutually exclusive. I disagree somewhat, and he does admit that the best strategy is often a combination of two of these to achieve a broader purpose.

You may argue that other Strategies could be added to the list. Quite possibly. The point is to know as precisely as you can what your Strategic Priorities are, and ensure you keep them 'top of mind' as you plan, carry out and monitor your work. With each fundraising measure you take, know which of these Strategies you're working toward.

Also, once you've achieved primary strategic goals set at one stage of your group's existence, it may be appropriate to shift Strategic Priorities in light of new circumstances.

Warwick lists five pitfalls to avoid on the road to developing effective strategy:

1. **Inability to resolve conflicting demands**
2. **Indecisiveness**
3. **Confusing means with goals**
4. **Mistaking tactics for strategy**
5. **The failure to persist - giving up before you reach your goal**

Points to remember in fundraising

1. **Whatever you do, Be Enthusiastic.**
   If you're going to do something, you might as well do it wholeheartedly.

2. **You don't get what you don't ask for!**
   If you don't ask, the answer is always "No".

   How many times do we put our own ceiling on how high we can go?

   One of the main reasons people offer to explain why they don't give is "Because I wasn't asked."

3. **People who are really into Goal Setting often say "What you set is what you'll get".**
   I'm not sure I totally agree, but I will say that what we *expect* is awfully close to what we get, provided we plan, then work tirelessly, flexibly, intelligently and patiently to make the plan happen.

4. **"People give to people." "Who asks?" It's a fundraising axiom, and you will find it's largely true.**

5. **The two most important words in fundraising: "Thank You".**
   You cannot say "Thank You" too often. And it doesn't hurt to be creative in the ways you say it, either.

Why People Give

The appropriate prospect was asked
To support a project they believed in
By the person best suited to make the request
At the right time
Using the proper technique for that person

SOME REASONS PEOPLE GIVE TO CHARITY

1. Belief in the institution or organization and its purposes
2. Belief that current needs are important
3. To participate in a worthy cause
4. From a sense of loyalty, gratitude or affection
5. Pride of association – sometimes private, sometimes public
6. Partially for tax considerations
7. Out of friendship and respect for those who ask them to give
8. Out of respect for the organization's reputation, or that of its leadership
9. To make a change for the good
10. From a sense of religious or political conviction
11. As a way of proffering thanks for their own good fortune
12. In response to social pressure or convention; to gain recognition or respect
13. Out of a sense of social or civic responsibility; to make a *difference*
14. As a sincere expression of compassion and empathy for others
15. People give because they *want to*
16. People give to opportunities, not to needs
17. People give to success, not distress
18. People give because they were asked
19. People give a second time because they enjoyed the experience the first time

20. People enjoy being acknowledged, in whatever way best suits them

21. People keep giving because a number of the factors above combine to make them feel that giving to this cause is an important part of who they are

***Almost* Random Thoughts**

The modern environmental movement is less than 40 years old. Rachel Carson's "Silent Spring" was published in 1963.

Will there ever be enough 'giving from a sense of civic responsibility'? Can fundraising work on any broad scale without some emotional component?

The sophisticated, logical 'educated donor' may exist. If so, she appears to comprise a very small % of all donors. Fundraising is about evoking response, and the public always has the right to respond as *they* see fit, not as we would have them do. Fundraisers must concentrate more on what donors want, and less on what we may want to tell them.

The impulse to give is usually a complex one, often combining aspects of several major motivations. Yet, at base, *fundraising is about arousing human emotions*.

Does voluntarism preclude donation?

Most people give more time than money. It's probable that many Not-for-Profit charities, especially smaller ones, have more volunteers than they have donors.

A major study in the UK in 1995 concluded that 'People tend to either volunteer or to give money -- seldom both. Charities' attempts to stimulate both together are likely to be counter-productive." Many local Not-for-Profits apparently feel this way, and "...don't dare ask them to give us money, too, after all the time they've given us."

Question: Is it true, or merely a self-fulfilling prophecy, that volunteers are 'giving enough' by giving their time? Would they be so offended as to leave the organization if they were asked for money, too?

Aren't these volunteers likely to be among the most socially aware, altruistic, dedicated, caring and *decent* people the organization might hope to reach? And, sometimes they're well-off financially, too. In other words, if they weren't volunteering, would they not be considered ideal targets for successful fundraising on behalf of the cause?

We must be tactful, and very respectful of what they have already given, but we'll never know the answer until we ask them.

As a related thought: *Time* is the most, perhaps the *only, truly democratic resource*. Can smaller groups use it as their equalizer?

What does a gift say about a Donor's relationship with the Not-for-Profit?

Not as much as some 'keepers of the database flame' might have us believe – As many as 62% of first time givers never give again to that charity. Fewer than 50% of those who give a second gift will ever give again after that. Some of the terms we've invented to describe these donors ("attrition"; "lapsed"; etc.) suggest some 'relationship' existed with these people. Did it, really?

A lot of giving is spontaneous and in direct response to some event: a disaster, famine, or whatever (such as the Quebec or Winnipeg floods, or the recent ice storms, all reported upon extensively by the media; or, a disease affecting a close friend or relative; or, a special seasonal appeal.

These are responsive acts of human compassion, kindness and generosity. They do not make the donor necessarily a supporter of the organization, nor even, in the long term, of the cause (although most people in these instances are giving more to 'the cause' than to the particular charity group). Most charities and Not-for-Profits don't have a great degree of "brand recognition" in the minds of the public.

It's best to assume that your organization will have to *develop a track record*. Determine what you can do to make it clear to a prospective donor that you are trustworthy and will use the donor's funds wisely. Your organization will have to develop a relationship with the donor, and make it clear to her through your ongoing actions that you are honest, dependable, and will deliver a life enhancing service, worthy of continued support.

People will sometimes give considerably more money to an organization if they can see that theirs is a truly distinctive gift, that will make an unusual amount of difference (and, perhaps, is accorded appropriate ceremony and distinctive recognition).

Donor Recognition

There are a lot of ways to say a sincere "Thank You", and you can find more. 'Clubs' and elite societies for larger donors; social get-togethers and special events tend to make people feel good about having given generously.

Sometimes just communicating more frequently is enough -- a letter; an "acceptance certificate"; keeping donors in touch with how their money is being used. For carefully chosen lists of participants, special schemes that use distinctive, special, ceremonial touches seem to work well.

What of the Donor Pyramid? (See Enclosures)

There are a lot of Pyramids out there in the fundraising world. One common version portrays a sequential process of progressive 'donor upgrades' leading to the nirvana of a legacy. It's helpful as a reminder to fundraisers, but it suggests the relationship is *inevitably* sequential, and in truth, such *is* the essence of 'donor development'.

Yet, statistically, most legacies are left by *people totally unknown to the charity* prior to the gift. While we're on the subject, in most countries around the world that keep track, *only 1 in 8 of people who make wills leaves money to charity.*

So, make reference to Donor Pyramids and Gift Pyramids. They're useful tools. But they aren't among the Wonders of the World. Don't worship them. Beware getting too caught up with the 'scientific' aspects of fundraising. "Lies, damned lies, and statistics" and all that. 'Demographic' and 'Psychographic' stereotypes will no doubt soon be with us. Use these tools, but beware all easy truths.

A prosaic observation:

Giving to charity seems to be done mostly by middle class people. However, the good news for fundraisers is that, in modern western societies, the vast majority of people think of themselves as middle class. Thus the 'average donor' may be 'most people'. Like Pogo's 'enemy', s/he is probably us. It may also be worth remembering that most of the time, most people are more decent than not.

The Canadian Charitable Sector amid Social Change

The Canadian social, political and economic environment has undergone a radical shift in the past decade, in the public as well as the private sector. These changes have had an impact upon our consciousness and our lives, both as individuals and as a society.

"If these are the good times, why don't I feel better?" Displacement and Insecurity

Some facts affecting many Canadian wage earners

- **Average family income is shrinking. Real family income is lower than in 1970's.**
- **Household debt is at an all-time high. Jobless recovery was much slower in the 1990's than anticipated.**
- **Some recent signs of positive change: National unemployment rate below 9% for the first time in recent memory. Real job growth during last ten months of 1997.**
- **Still, particular areas of the country (e.g. Cape Breton, parts of Newfoundland, rural areas in the Atlantic Provinces and Prairies) continue to have high unemployment.**
- **Canada's long-term record of job creation has averaged the highest of G-7 countries, and Canada is expected to have the fastest growth in G-7 for the next several years.**
- **Canadians are facing different situations from their parents. A recent study indicates 61% of income earning families are dual income earners. StatsCan 1995 study: 16% of Canadians were self employed; 12% worked part-time; 10% had temporary or contract jobs; 6% worked from their home; 17% worked days other than Monday to Friday or shift work; only 33% of Canadian labour force had 'typical' nine-to-five job.**

Are the social safety net and our cultural integrity being threatened?

- **Hospital closures and mergers are occurring in every province.**
- **Rapid rise in university tuition fees; looming crisis of individual debt from existing student loan programs. Feb. 24's federal budget introduced measures to address this.**
- **Fears that higher education will again be a privilege, available only to the wealthy.**
- **March 2, 1996 Globe and Mail; Performing arts consultant quoted: "Right now, Canada is one of the worst fiscal environments in the Western world for the arts."**

Economics, politics, demographics & new technologies drive the demand for change.

- **Federally and in all provinces, regardless of nominal ideological stripe, governments have opted for policies of social retrenchment in the name of fiscal responsibility and deficit reduction. We do not yet know where these policies will leave us. In the short run they have resulted in tremendous upheaval in the lives of many citizens.**
- **Comprehensive, government funded social and educational safety net is being eroded and radically rationalized, with some aspects actually disappearing. Although it has caused much dis-ease, some Canadians allow retrenchment addresses a real problem. Federal deficits had resulted in increased federal debt, and more and more tax dollars were being spent to pay it, with less available to deliver programs and services.**
- **Canadians appear to be somewhat ambivalent about the changes. We seem unsure whether to accept claims of impending good times, yet hesitantly pleased to learn of balanced budgets and predicted growth. We appear to be taking the historically low interest rates which are intimately connected to all these trends for granted.**
- **It may be fair to say that many don't know yet whether they like what has happened, and what may develop if the trend continues. The debate *will* continue.**

- **It seems clear that whatever efficiencies may be achieved in education and health care, the Canadian public does *not* wish to see these valued public systems dismantled and replaced by a US-style system of far greater privatization and narrower access.**

What effect have these changes introduced in the climate for charitable fundraising in Canada? Is there a role for the Charitable Sector in the ongoing policy debate?

Thoughtful commentators wonder aloud if we are witnessing the end of a relatively brief historical experiment with the Welfare State, or just a rearranging of priorities. One writer says Sweden and Canada have made the most drastic adjustments in their social safety nets in the past decade. Now, it's time to consider how to reinvest coming surpluses.

A serious debate is opening up over the next decade in this country. In Canada as elsewhere, the climate of government spending cuts has hurt charitable organizations at the same time as the cuts' impact has created increased demand for charities' services. Will the Not-for-Profit sector take a leading role in framing this national debate? Should members of the sector not be high profile participants in achieving solutions in these areas?

Charitable Not-for-Profits could be at the forefront of this debate!

Has the Private Sector made up for government funding cuts to the 'Third Sector'?

In Canada, governments have been the primary funder of 'the Third Sector'. About 57% of all revenue flowing to all registered charities in Canada in 1994 was from governments -- federal, provincial, or municipal. The sector consumed 40% of total federal government outflow that year, 50% of local government expenditures and over 60% of provincial government expenditures. Much of the provincial total was throughput from federal level.

If contracts were counted, a much greater percentage would be from government. If religious and private foundation charities were excluded, it is said that the proportion of revenues derived from government sources in 1994 would have exceeded 60%.

The Private Sector's Contributions to date

Comparison of total charitable donations taken in by the Not-for-Profit sector in 1994:
Individuals: 9%   Charitable foundations: 7%   Corporate sector: 1%.

Balance, approximately 28%, derived from fees for service, dues and other charges. Ratio, $7-$9 from individuals for every $1 from corporations, has held fairly steadily for some time. Foundations giving a slightly lesser % of late, influenced by low interest rates.

Considering only non-governmental charitable dollars, individual gifts category is comparable with totals in the United States (81.4% in Canada; 87.6% in the U.S.).

A Profile of Canada's Third Sector

Approx. 74,000 certified charitable organizations within Canada's third sector in 1994. That year, about 4000 new applications were submitted to Revenue Canada, with about 3000 approved. However, through mergers, closures, cutbacks, etc. attrition of existing organizations meant *no net gain* in the number of charitable organizations in the sector.

Organized religion used to receive over 50 cents of every charitable dollar in Canada. In 1993, tax filers in Canada reported giving only 30 cents of each dollar to religious causes.

The Third Sector as a Factor in the Nation's Economy

A recent international study involving seven countries (unfortunately, not Canada) found the charitable sector is a major *contributor to* the economies of developed nations: an 'economic engine' -- an extremely significant generator of jobs and purchaser of products.

Canadian charities' total revenues in 1993 were estimated to be about $86 billion (approx. 12%-13% of the GDP). They employed 1.32 million people (9% of the labour force) and benefited from the work of 5.3 million volunteers who contributed over 1 billion hours of their time. Canada has one of the highest rates of voluntarism in the industrialized world.

More than half the $86 billion went to Health Care and Education (i.e. educational institutions and hospitals), reflecting Canadians' historical belief that good health

care and broad access to educational opportunity will provide the basis for societal advancement.

For the decade prior to 1993, about 14% of all government spending annually went to charities. In 1993, charities also received $540 million worth of gifts in-kind. In 1994, charities received $8.2 billion from individuals, about 2% of all Canadians' personal spending, compared to $1.2 billion from corporations.

How well did Canadians support the charitable sector in the decade from 1984-1994?

In the first half of the decade from 1984-1994, donations and support of the charitable sector went up, and the percentage of those claiming charitable donations went up every year from 1984-1990 (with only one exception: 1988) yet has declined since that time. The *number* of individual donors began to decline over the last of the decade. Since 1989 the total number of dollars given (taking account of inflation) remained more or less flat. In 1994, 27% (nearly 5.4 million) of Canadians reported charitable donations. This was a decrease of 3%. However, they reported giving more dollars each.

Meanwhile, corporate donations were down $55 million from 1992 to 1993, and another $25 million in 1994. Corporate donations dropped by $30 billion dollars from 1990-1994. So, the corporate sector appears unlikely to make up for government cutbacks to charity.

And what might the future hold?

Huge individual gifts of millions of dollars, witnessed by Americans in the recent past, are rare in Canada, and are never on the same scale as in the US, partly due to population.

As fundraising activity increases, and Canadians' become more aware of it, there will be greater media scrutiny. This attention could be more negative than it has been to date.

Are charitable fundraisers beginning to push the limits of the Canadian public's tolerance? A 1994 national survey asked Canadians' views on personal privacy. Of four practices they considered the most serious invasions of privacy, two were 'the sale of mailing lists without their consent' (74% of respondents) and 'unsolicited telephone calls' (59%).

Directions in Fund Raising amid these National Trends

Campaigns are taking longer to operate. Some reasons for this trend:

- **Prospective donors are confronted by a significantly increased and growing number of requests for charitable gifts, from a broadening array of solicitors.**

- **Many corporations have begun to construct internal 'criteria for giving' and to be more thorough in assessing giving options. Responsibility for charitable requests is moved 'down the line' to committees of employees. Some employ P.R. firms to review proposals and evaluate them in light of marketing goals.**

- **Increasing "donor fatigue" - among corporate and individual charitable sectors. Among individuals, increasing sophistication and selectivity regarding which charities receive contributions and what is being offered the donor in return.**

- **Charities subjected to a great deal more scrutiny. Accountability a watchword.**

- **Emergence of 'baby boomer' generation as a group with significant charitable giving potential, and as corporate leaders. 'Demographics' a buzzword, for a reason. Characteristics suggest groups' behaviour as consumers, and donors.**

- **'Psychographics' is about to become a buzzword, as well. Measurements of values, attitudes and lifestyles are integrated with demographics to give a fuller picture of what people will likely be interested in, and willing to support.**

- **Increased emphasis on "friend-raising before fundraising". "Relationships" of quality, over lengthier periods of time, are the focus of fundraising approaching the 21st century. Technology has influenced ability to communicate to larger numbers of people, faster, and in more diverse ways. Yet long term donor relationships to a cause are fundamental, usually quite emotional connections.**

- **Practical reasons: Cost to gather new donors is much greater than retaining and developing a stronger bond with those you have.**

- **Greater acceptance of long term, *advance* planning and organized, *systematic cultivation* of potential major donors to ensure proper welcome into the organization's circle of friends long before being asked to contribute big gifts.**

- **Another factor (re planned giving in particular, but in all charitable giving considerations): rapidly increasing life expectancy in industrialized nations around the world. Educated individuals anxious about outliving resources.**

- **Tax & estate planning: 1996 federal budget -- increase to 50% of income eligible for charitable deductions; capital gains exemption for gifts of appreciated capital property; and 100% of charitable donations in the year a taxpayer dies, with any excess eligible to be carried back one year, creditable.**
  Less helpful: Proposed RRSP clawback will contribute to greater worries by middle class Canadians of being unable to finance their retirement years.

Challenging economic times and corporate trends toward internal rationalization have led, in many cases, to decreased levels of giving. Corporate giving has <u>not</u> increased sufficiently to replace reduced government contributions to the charitable sector. Corporate giving has, in fact, remained relatively flat over this period.

- **Many corporations have moved more dollars from philanthropic into targeted marketing and sponsorship budgets. Thus, the corporate relationship with organizations seeking to raise funds is being assessed by different, often much more stringent criteria, dictated more by business than philanthropic values.**

- **A growing list of companies determine a limited thematic scope within which to focus their charitable and sponsorship activities. In effect, far fewer gifts are made to a select number of fortunate causes - 'though each <u>may</u> be of a larger dollar amount than would have been true in a more demand-responsive charitable giving policy, this is not always the case. Companies seek to conserve staff time and energy, to focus charitable efforts in areas <u>they</u> have carefully chosen, rather than reacting to requests. Results of charitable or sponsorship initiatives are more closely monitored relative to dollars invested.**

Within established institutions, there have been signs of less willingness by staff members to respond generously to institutional fund raising initiatives:

- increasing uncertainty regarding future employment and income levels; and
- increasing instability, generally, in the not-for-profit field -- reduced levels of government support and increased numbers of organizations seeking support.

Other trends may begin to pose problems for workplace campaigns like the United Way. Reductions in corporate and government work-forces, although partially offset by the advent of home-based and small businesses, appears to decrease charitable giving.

Advent of home-based businesses as a significant % of the economic marketplace has had an initial diminishing effect on charitable fund raising prospects in the overall business sector. In early stages of development, or operating with very small margins, their cash flow may mitigate against consideration of generous charitable participation.

Small businesses may prefer in-kind charitable contributions until well established. For near future, engage them as volunteers; board members or resource persons bringing specific expertise, creativity and energy for an agreed upon time period. Grow with them.

Trend among large corporations (and municipalities) toward mergers may bring diminished prospects for charitable fund raising. Post-merger gift totals may not equal those given by the two entities separately before they combined forces.

Amalgamated municipalities: ("Halifax may tax charities - Municipality faces budget crisis, says Mayor" Tuesday, February 3, 1998, Mail Star). Fewer municipal sources to go to; many experiencing fiscal crises; further removed from localized personal influence.

The fund raising environment has become more competitive and increasingly complex, resulting in a trend toward greater professionalization of the field.

- Expanding competition and greater sophistication has led to a perceived need for efficient, effective, experienced fund development management.

- Not-for-profits who can afford professional help benefit from a carefully organized, systematic approach to fund development. Experienced professional counsel guides volunteer led programs through all aspects of fund raising.

Thus, as fund raising becomes more competitive and complex, requiring greater, more sophisticated application of resources to succeed, the charitable sector develops 'haves' and 'have-nots'. Larger, better-financed charities enjoy distinct advantages in competition for limited fund raising dollars.

Their larger budgets, 'name brand recognition', trained staff, attractive facilities, good equipment, large volunteer contingents, influential board and advisory groups, etc. enable them to mount cost effective fundraising operations using a mix of methods, providing a solid basis for future growth and development.

- 70% of all funds raised go to the best resourced 16% of Canada's NfP's (total annual revenues > $1.5 million). Fundraising dollars are 10% of their total revenues, so they are not totally dependent upon this source for their existence.

- Only 5% of total funds raised (4% of those received from corporate donors) go to charities with revenues of < $125,000 (38% of the country's charities), yet these account for 56% of their total revenue. Also, 50% of all funds raised in Canada go to charities in Ontario, where 36% of Canada's charities are located.

- Atlantic Canadian charities = 10% of the nation's charities, but attract 14% of total corporate national charitable donations. Unsolicited donations are the largest source of Atlantic Canadian charities' income. Atlantic Canadians are consistently among the country's most generous donors relative to income.

- Available fundraising methods differ by size of group. Large charities benefit from Direct Mail and Planned Giving. Smaller charities rely on Special Events and Charitable gaming for most of their revenues.

- Nationally, Special Events, Charitable Gaming, Product Sales and Direct Mail are most frequently used, in that order. However, Direct Mail brings in the most revenue, followed by Special Events, Planned Giving and Capital &/or Endowment Campaigns.

- **The most cost effective fundraising methods, on the other hand, are (in order): Workplace Campaigns, Planned Giving, Direct Mail, Charitable Gaming, Special Events and Product Sales.**

- **Special Events and Product Sales are among the least efficient uses of groups' resources when measured in terms of dollars raised relative to time/energy investment. One suspects they're used most frequently because they may involve less up-front monetary outlay, and allow 'sweat equity' to be substituted for expertise and financial resources. Yet, their accomplishments are often more in the realm of public relations than in fundraising.**

The combination of these factors has led to a further national trend. Fund raising has become more expensive, especially for those who can devote the fewest resources to it. A 1996 nationwide survey of charitable fund raising ascertained that the average cost of raising one dollar is twenty six cents. The cost is *often much higher for less well resourced charities*, and they have a tougher time getting their fundraising message out.

- **Hospital charities attract many more dollars from *all* sources than Arts & Culture, Social Service or Community Benefits, and tend to receive more large gifts. At the same time, according to a 1995 national survey, 46% of *corporate* charitable gifts went to 'Education' and 'Social Services'.**

- **'Community Benefit' charities (which included environment, civic & advocacy and legal services, recreation, service clubs and animal/wildlife) received the least amount of corporate funding, and by far the lowest funding relative to their numbers, despite being the second most numerous category (3% of funding; 16% of groups surveyed).**

- **Non-institutional 'Health' groups fared only somewhat better (6% of funding; 11% of groups surveyed), joining 'Social Services' (20% of funding; 29% of groups surveyed) as the other two categories in which corporate dollars received were less than might be considered their 'share' on the basis of how many of them exist.**
  'Community Benefit' and 'Social Services' groups also receive *smaller* grants on average from the corporate sector, so are doubly disadvantaged.

The disparities between large, well resourced organizations and the much more numerous but lower profile smaller groups will continue to widen unless the latter are creative and collaborative in finding ways to (a) make their small size an advantage through use of modern technology, developing close links with their chosen constituencies, flexibility, and the application of tremendous energy and imagination; (b) build true partnerships based on mutual advantage; (c) develop networks and coalitions to enable them to share resources and gain economies of scale, while retaining their autonomy and independence; and (d) use these qualities to create new niches in program, service delivery, communications and fundraising, among others, which will make them unique in the eyes of their supporters, and hopefully the broader public.

We're all aware of how competitive it is out there. Coalition & Coevolution. Efforts can advance through cooperation. Yes, it requires work, but so does competing. Seek opportunities to join together to achieve common goals. Explore these in your planning. Research what might be involved in making such a coalition happen. Act.

Finally, a question and a recommendation. Question: Are you currently a charitable donor?

Recommendation: If you're not, become one. Begin by donating to your own organization, if you like. After all, 'charity begins at home'. Don't stop there, 'though. Consider giving to at least one other charitable cause you believe in.

Why? By becoming a donor, you begin to share a donor's consciousness. If you resist the idea of donating to charity, it'll help you understand what an uncommitted prospect may be thinking. Every excuse you can find not to give, they can, too!

If you can't convince yourself it's worthwhile to make a monetary contribution, how can you expect someone less committed to those causes to do so? If you can't find a way to budget your funds to enable you to make a contribution of some amount, how can you expect someone else to do so? Etc. I think you get the drift.

There's also a very positive reason to make this commitment to yourself. It actually feels *good*.

You can help change the world. As Arlo Guthrie sang a long time ago, "If enough people start doing it, we'll have ourselves a Movement!" And as Socrates said an even longer time ago: "Let him that would move the world first move himself." All the best.

Special Event Success Quotient

Rate your readiness. Higher Rating = Greater Success Potential

Aspect	**Rating**
• Concept - Do enough of you like the idea? (esp. KEY people?)	
• Enthusiasm Inside & Outside Organization?	
• Fit: Is the idea compatible with Mission, Strategy, Principles, Image?	
• Potential for Repetition & Growth?	
• Marketing - Can you sell this idea to enough people?	
• What is the idea's "Excitement/Uniqueness Quotient"?	
• How broad is the idea's potential appeal?	
• Will the community respond positively to the idea?	
• Will your preferred constituency respond positively to the idea?	
• Can the idea be communicated easily & widely?	
• How likely are you to secure a sponsor for this idea?	
• Resources - Do you have enough of everything you need to do it?	
• Doable with your current resources?	
• Do you have the right volunteer leadership in place?	
• Will this project overtax your volunteer or staff resources?	
• Will this project complement or compete with what else you're doing?	
• Confidence in Budget Projections?	

- **Timing - Is the timing right for this event?**
  - Can you execute your plan in the time you have?
- **Will you be competing with other (Int/External) existing projects/events?**
- **Do you have enough time to ensure this will be an excellent & profitable event?**

Checklist: Do you have at least 3 of these going for you?

1. **Well recognized cause -**
   Broad based support
   Urgency
   Current media attention
   Large volunteer group
2. **Strong local donor base - committed & capable**
3. **Board, &/or Chair(s) + Committee with clout**
4. **Unique location or timing**
5. **Commitment from a major celebrity or RPWILF (Respected Person with Influence & Lots of Friends)**
6. **Enough TIME to prepare fully**
7. **Internal leader/coordinator who has what it takes -**
   Good with people while being firm & focused
   Detail oriented
   Decisive
   Able to keep everyone on the path, and on time
   Results oriented
8. **Sponsor(s) to underwrite most or all of the costs**
9. **Adequate budget & resource base to provide insurance**
10. **A clear, shared vision of why you're holding *this* event**

Cause-Related Marketing and Sponsorships

Definition of a Corporate Sponsorship relationship:

A contractual, marketing-oriented business arrangement between a corporation and a Not-for-Profit or charity which ideally benefits both.

It is a 'quid pro quo' business relationship, a marketing strategy in which the corporate partner agrees to pay the NfP an agreed upon amount of money in return for a specific, generally time-limited relationship. A sponsorship arrangement can allow both the corporation and the NfP an opportunity to enhance their image, and may also afford the corporation a chance to position or test a product, and sometimes sell a product.

Definition of Cause-related Marketing (CRM):

A concept which enables a corporation to increase its revenue while benefiting a Not-for-Profit or charity through an affiliation or cooperative venture. It is a 'quid pro quo' relationship, a marketing strategy which allows both the corporation and the not-for-profit to make money. Generally, the concept is embodied within a promotional campaign in which some portion of the proceeds from each sale of a company's product or service go to the charitable organization.

CRM originated in 1983 with the American Express campaign for restoration of the Statue of Liberty in the United States. It was seen as a new way to engender increased corporate giving, which had been flat for some time.

It has been critiqued as a dangerous innovation, and has been called "phoney philanthropy", since it may encourage corporations to become more profit-oriented and less charitable in their relationships with Not-for-Profits. "Doing Well by Doing Good" has become a phrase often associated with cause marketing.

The concept is still relatively new and under development, especially in Canada. It remains to be seen what the longer term future of this marketing/fundraising innovation will be.

Factors in proposing a cooperative partnership between a Corporation and a Not-for-Profit:

1. Do your homework. Know your prospective partner's situation and concerns. Research the company thoroughly to understand its priorities and contemporary situation.

2. Present the idea as a valued service. Demonstrate, without being presumptuous, how it can benefit the company, as well as the benefit it will engender for the community your organization serves.

3. Be prepared with a polished and credible presentation. Be conscious of the potential corporate partner's marketing objectives, and suggest how a sponsorship or cause marketing relationship can advance these.

4. KISS. Keep proposals simple, straightforward and factual, with a clear explanation of potential benefits for both partners. In negotiating these corporate business partnerships, it is generally advisable NOT to send a written proposal until you have developed the idea relatively fully in concert with the corporation's marketing or other staff.

5. Although it can be difficult to arrange a long term relationship, go into these partnerships with long term goals where feasible.

6. Write a contract, defining terms and conditions clearly. Both parties must be clear about mutual expectations -- who will do what by when, how often, and in what ways. If there are 'guarantees' in terms of performance, state these. Also, what is involved in either party deciding to terminate the arrangement?

7. Be clear about use of one another's 'mark', 'name', or 'brand image', including logos.

8. Fit is critical, as is selection of the appropriate format to optimize the relationship. Be sure to leave room in your early conceptualization of the idea for the company's marketing staff to add their own twists and embellishments.

9. Within the bounds of tact, put all concerns on the table at the outset of negotiations. Unexpressed fears, concerns, anticipated difficulties may well develop later on into deal breakers. Get them on the table for discussion up-front.

10. Communication is critical at every stage of negotiation and thereafter. Stay in touch with your partner. Build this into your arrangement when you're structuring the deal.

Some Potential Advantages for the Not-for-Profit

1. Ideally, CRM's and Sponsorships are 'Win-win' relationships.
2. Enhanced image: heightened awareness of the organization and its programs.
3. CRM, in particular, represents an innovation in its approach to corporate fundraising, and can help diversify your organization's fundraising.
4. Increased income from an additional, otherwise unavailable source.
5. Increased visibility and general public awareness, with the corporation footing the marketing bill.
6. The corporate partner may be included among a larger group of community partners, relationships with whom may provide a variety of potential benefits.
7. CRM's and sponsorships can be a means to increase public access to knowledge and information about your NfP.
8. Establishing a CRM doesn't consume a lot of most volunteers' time, although it can be time consuming for Board members. Sponsorships may or may not require more widespread volunteer effort.
9. An additional benefit for the Not-for-Profit may be gaining access to new volunteers from the corporate partner.

Some Potential Advantages for the Corporation

1. Ideally, CRM's are 'Win-win' relationships.
2. Enhanced image: heightened awareness of the corporation's charitable interests and programs.
3. Increased income and ROI through affiliation with a valued cause.
4. Increased Publicity, of greater variety than might otherwise be available.
5. Commitment to a cause can have a number of positive side effects for the company.
6. A good relationship with a well regarded charity or NfP can provide a valuable extension of the corporation's value system into the community.
7. CRM's and Sponsorships can enable the company to cultivate favourable attitudes from consumers.

8. CRM's and Sponsorships can be a means for the corporation to stretch its marketing budget.
9. As a 'social investment', CRM's and Sponsorships can be a form of good corporate citizenship.
10. CRM's and Sponsorships can provide an excellent platform to introduce new products.

Some Potential Disadvantages for the Not-for-Profit

1. If the NfP doesn't have 'Brand Recognition', is not a well-known or highly visible organization, it may not be able to entice a corporation into such a relationship.
2. Income, profile, etc. for the NfP are dependent upon the success of the corporate partner's marketing, media campaigns.
3. There may be potential for negative public reaction to the initiative.
4. Establishing and maintaining the relationship can be very time consuming.
5. There may be potential for the NfP's mission or vision to be affected by the relationship. Fit is very important in this regard.
6. The project could affect the NfP's relationships with other businesses which compete with the corporate partner.
7. The NfP must exercise care to avoid any potential perceived compromise of its integrity.
8. It can be difficult to arrange a long term relationship; thus, such ventures come and go, and stability can be hard to achieve.

Some Potential Disadvantages for the Corporation

1. There may be potential for incompatibility between the image of the corporation and that of the NfP.
2. Weak allies, such as media or co-sponsor, can cause difficulties.
3. Public mistrust.
4. Loss of control of corporate objectives.
5. There may be potential for incompatibility between the organizational culture of the corporation and that of the NfP.

Further Cautionary Notes, especially for the Not-for-Profit

1. **Both parties should give careful consideration to the potential impact of a relationship upon their image, before entering into an agreement.**

2. **Both should select their partners very carefully.**

3. **The NfP should avoid making decisions solely on the basis of income, no matter how tempting the opportunity appears.**

4. **The NfP must be careful to avoid over-reliance upon CRM or similar cooperative sponsorship ventures as a significant portion of their basic income stream.**

5. **Planning for CRM's and sponsorships should be undertaken with awareness that the relationship may not be longterm, despite the best of intentions.**

6. **Remember that consumers aren't likely to become donors. These are different kinds of interest.**

7. **In writing the contract, attempt to avoid any arrangement which limits the amount the NfP can receive by tieing it to the company's overall profits, or by making payments to the NfP contingent upon the number of products sold.**

8. **Where there is a "% of sales" relationship in place, attempt to ensure that the amount or percentage of money the NfP will receive is clearly indicated in all advertising.**

9. **Fit is crucial, as is the place of the partnership within the NfP's overall mix of relationships. NfP's should consider all their constituencies and try to determine whether a CRM or sponsorship will inhibit other forms of fundraising.**

Direct Response Marketing

Direct Mail:

- **(Various media: letters, brochures, leaflets, videotape, audiotape, etc.)**
- **Telephone Campaigns.**

Others:

- **Paid Advertising (Newspapers, Magazines, Radio, TV)**
- **Free PSA's**
- **Telethons**
- **Radio Appeals**
- **Door Drops**

Future Possibilities:

- **Combinations**

Among people who are committed to valuable causes, there is sometimes a disdain for commercial practices, but if truth be told, many if not most successful direct mail fund raising practices are derived from their more commercial counterparts, and it may serve us well to take a closer look at what works in that context.

Plus Factors:

DRM is *ultimately and eventually* a very cost effective way to raise funds, but it takes time to become so. It is especially suited to large groups, but if properly planned, implemented and monitored, with the understanding that you're in it for the long haul, it can hold promise for smaller, dedicated groups as well.

Warning:

DRM depends upon economies of scale, using massive volumes to achieve cost effectiveness. It favours larger charities which are better known (i.e. 'Brand Recognition' goes a long way in getting the response you need).

When an organization first uses DRM, it's often as a *recruitment* tool (donor acquisition). At first, most or all of the money goes right back into further mailing to expand the donor database.

This is a long term commitment. It can pay great dividends over the long haul ,but it requires vigilance and monitoring (donor attrition; maintenance; etc.).

Small groups who are relatively unknown may get discouraged and actually lose their investment, especially if they're counting on it paying off before a year or two (sometimes longer) have passed.

Here are some tools, tactics, techniques and thoughts for you to consider:

Roger Millington's Leverage Points Analysis (for commercial direct mail).

Four factors, weighted in terms of their impact upon the success of an appeal

1. Audience - The Prospect List

Those to (or at) whom the message is directed. The nature of the mailing list. The newspaper, magazine, radio or television broadcast channel selected.

The most important Leverage Point. Leverage Factor of 200%. In other words, the best of a group of mailing lists will usually outperform the worst by a factor of 3 to 1.

2. Offer

The answer to that famous question: "What's in it for me?" (Commercially -- price reduction; free gift; trial period; money back offer; lifetime guarantee, etc.). In fundraising, refer to Donor Needs.

2nd most important Leverage Point. Leverage Factor of 100%, i.e. the better offer can 'outpull' a less attractive one by a factor of 2 to 1.

3. Format

The means of reproduction. Is it an advertisement - full-page or classified; a full-colour mailing; a simple letter; a flyer; a foldout of some sort; how big is it; if it's a letter, how many pages, in what typeset, with or without a PS; etc.?

3rd most important Leverage Point. Leverage Factor of 50%, i.e. a change in physical format can affect response by a factor of 25% to 50%.

4. Creative

The words (copy), pictures, tone, graphics, colours, slogans, logos; generally the *ideas* we use to communicate the message.

Sadly for us creative types, this is the 4th most important Leverage Point. 25% Leverage Factor. Changes in this realm are deemed to be the least important of the possible influences we can bring to bear upon a mailing piece. There are exceptions. But, to quote Millington: "Rather than waste a day searching fruitlessly for a new creative approach, it is easier and much more profitable to spend 15 minutes devising a bright new offer. (If the offer is a good one, then the headline will write itself!)"

5. Timing (a plausible fifth)

We can all think of events in life which unfolded in a particular manner almost solely due to WHEN they occurred. Emergency appeals around disasters illustrate this point, as did the recent postal strike in its impact upon the fortunes of numerous Canadian charities.

Mal Warwick's weighting estimate of the various factors in a Direct Mail piece:

List Selection (Audience)	**25%**
Copywriting (Creative)	**10%**
The Offer	**5%**
Format	**5%**
Design	**5%**
Your organization's track record, message and leadership	**50%**

Seven different Types of Mailing Lists:

1.	**Donors**	**Have given $, probably in response to a DRM appeal**
2.	**Members**	**Have paid membership dues to an organization, probably by mail**
3.	**Subscribers**	**Subscribe to as periodical; maybe in response to a DRM appeal**

4.	**Buyers**	**Have bought stuff through the mail, prob. by catalogue**
5.	**Inquiries Sweepstakes**	**Have responded to an ad or a DRM package; probably have sent very little money**
6.	**Compiled Lists**	**Second generation, merged lists**
7.	**LCBGI**	**A variation on 'Management by Good Idea' 'List Creation by Good Idea' Suggestions from different people; haven't produced results**

Most lists won't work for you. Evaluate on the basis of Donor history (do they give by mail?); Mail responsiveness (will they use the mail to pay for something?); Recency (how old is the list?); Accuracy (are there up-to-date, proper addresses, codes, and are names spelled correctly); Affinity (is there evidence of similar interests, especially past donor activity in this area?).

Some Additional Points:

1. Audience - The Prospect List

In 1993, 28% of Canadians and the same percentage of Nova Scotians claimed charitable gifts on their income tax returns. The median donation for Canadians was $140.00 and for Nova Scotians $535.56. However, 42% of residents within one postal walk in Halifax made average gifts of $1081.55. Logic would suggest this might be a good area to explore further when developing one's mailing list.

2. Note: The Importance of the Offer

"WIIFM?" = "Why should I give my hard-earned money to you?"

Too many groups forget that the value of the cause to which they are personally so committed may not be self evident to others, especially the uninitiated. Donors want something ('though it may be cerebral or spiritual rather than material) in return for their donation – a reward, a reason, even an excuse for giving. So how can we define what that offer may (mutually) profitably entail? How can we match the needs of the donor, in a way that will 'work' while remaining something we can live with?

Taste may get in the way at times, but if so it may be at our peril. Simply put, some pretty hokey devices work admirably in a fundraising context.

The one-to-one offer

Offers to sponsor an individual child, family, etc. may seem tasteless, but these devices work effectively over and over again, even as they are criticized.

What such devices achieve is the personalisation of the offer. At their best, they evoke a sense of a direct relationship between the donor and the cause. They allow the donor to imagine a *relationship* with the recipient.

At their best, these offers of one-to-one relationships seem to provide ordinary people (and let's be honest, that's most of us) with a way to feel they are giving more to life than they might otherwise be able, and seem to afford tremendous pleasure to a truly diverse array of donors.

Odes to immortality

On another front, the intimation of immortality seems to attract many of us at one time or another. Positive response often greets an offer to buy a flagstone or brick or other significant building block of a newly constructed edifice. The advent of the "individual brick" as a naming device may bring some democratization.

A Way to approach Direct Response Marketing

If you are interested in getting involved with Direct Marketing, there are some caveats you should be aware of, noted above. Regardless of whether you're ready to use it as part of your fundraising mix, it may be worthwhile to begin to view the Direct Mail you already receive as a learning opportunity.

Notice how many of the features listed below appear in the DM you receive. Make your own assessments of which of these techniques, or others you observe being used, are effective, and which seem tired or predictable. Can you find ways to improve on them?

You'll notice certain techniques which have become the norm in fundraising. Start a file of your own for reference. As you read the DRM samples in your collection, decide for yourself what you do and don't find effective.

Save examples of mailings you think are the best, and in another file keep the ones you find the least appealing. Begin to make judgements about what factors make them so.
Then, should you decide that DM might be appropriate for your organization, you'll have a basis for knowing what you want to include.

Some Technical Aspects of Direct Mail:

How a reader reads a mailing package
The entire envelope reading process lasts seven seconds, with more time spent scanning the back of the envelope than the front. Most people *will* open the envelope.

Average time spent reviewing the mailing's contents is eleven seconds. During this time, the reader's eyes scan pictures and headlines, not the body copy.

There follows a twenty second timespan while the reader decides whether to 'surf or turf'; to read or dispose of the mailing piece.

Of those who continue, 50% read the letter first. They start at the top, but then go straight to the bottom, looking to find the signature. More than 90% will read a PS before they read the rest of the letter.

Large pictures get attention before smaller pictures. Colour pictures attract before black-and-white. Portraits of people (head and shoulders) gain attention before full length pictures. Eyes tend to be the first thing focused upon. Eighty per cent (80%) of readers will focus on a vertical shape rather than a horizontal shape.

It is a mistake to place an eye-grabbing illustration at the lower right corner of a page. It will draw the eyes immediately to the 'exit' position, leading the reader to turn the page.

Handwriting will be noted before typewritten text, although there is some evidence that people are aggravated by computer-generated 'handwriting' fonts.

Numbers are noted before longer words. Copy within a border will be read before open text. Some letters use underlining and highlighting to further emphasize particular points.

Typical components of a DM package and the function they are intended to serve:

Component **Outer envelope** **('Carrier envelopes'; 'carriers'; 'outers')**
Function ***What***

A 'banner', (a few seconds to send a message, with the intent of intriguing the recipient sufficiently to get them to open the envelope instead of throwing it into the garbage). May have a window, to aid in this purpose.

Will contain the organization's logo, name and address, the prospect's name and address, often an 'if undeliverable return to' notice, and perhaps a graphic.

It is believed that a rhetorical question on the envelope will help get the receiver to open it. There is debate about whether there should be a photograph on the outer envelope. The imaginative combination of a photo and an intriguing question *has* made a difference in some well-known instances.

A second colour is often used, at times very effectively. Also, shading can make a difference in response.

What should appear on the outer envelope? 'The dignity of the minimal' versus the 'exhibitionists' --the souped-up snazzy-jazzy come-on afforded by modern graphics.
Minimalists seek 'authority and dignity'. Exhibitionists rely on creative combinations of pictures and words to intrigue the recipient sufficiently to draw them in.

Goal is to stimulate the observer's attention by applying intelligence.

All that said, what people pay attention to first is *how their name and address are spelled.*

Component **Body copy i.e. the actual letter**

Function ***Why***

This is the primary sales portion of the mailing. It tells the prospect what situation requires redress, or what initiative is available to make a real difference in some area, then explains why the charitable organization is the best means to effect the desired change, and requests the reader's donation.

The letter explains what a difference the donation is going to make in the particular area of focus. The letter is meant to sell your proposition to the prospective donor. It builds the case and makes the request for a gift ('the ask'). It seeks to involve the prospect.

What about length? Once it was determined by David Ogilvy (an icon in the advertising world for the last half of this century) that letters could be 4 pages long and be *more* effective than one or two page letters, the four page letter became the inviolable norm.

Now, there's active debate on this issue. It's got to be long enough to include the necessary information, and hopefully allow a bit of 'warm prose' to stir the emotions.

Letter lengths of 4 pages may be too long. Yet some practitioners have used 8 pages, or longer. At the same time, there may be the beginnings of a move toward shorter letters. Letters to corporate CEO's tend to be shorter.

Our firm recommends keeping the letter to two pages or less, and we never use a font smaller than 11, preferably 11.5 or larger.

Typical format for letters:

Inside Address
'Dear Friend' or personalised greeting (With the advent of computer databases, both these features now are usually personalised. The spacing used to give away the mass nature of the name insertion at times, but does so less often now.)

Paragraphs are usually indented to draw the eye forward. Text is justified ragged right.

The desired tone is 'personable and caring'. Narrative is used sometimes. (See later points about copy).

The request follows, and is then repeated or in some way added to or enhanced, in the PS.

The signature is pre-printed (blue ink is recommended by most DR experts) due to the massive volumes involved. Most operators in the field recommend only one signature. If two signatures are required, they suggest a testimonial or additional insert is the preferable way to go.

The PS is thought to be vital. It probably is, and unless readers' habits change markedly, it will probably remain so. Several decades of detailed quantitative research by a German professor who studied how people pick up, open and scan letters revealed, among many other things, that the two parts of the letter that will almost always be read (and may be the only parts that are read) are the top and the PS. This has lead to the ubiquitous use of 'headlines' (oftentimes underlined, sometimes in a second colour) at the top and the PS at the bottom (occasionally even a PPS) to 'restate the ask'.

The letter generally is folded with text out, so that the reader sees text immediately upon opening the envelope. Some letters, aimed at a more upscale prospect, may use a seal with the text inside, in an attempt to give a sense of uniqueness and 'class' to the mailing.

There is almost always a reply device (donor card; response mechanism, etc.) accompanying the letter, with a variety of standard formats for such options as: suggested giving amounts, pledging options, credit card payment, request for a receipt, etc.

Aside from the comment about a second signature, testimonial letters are sometimes included to lend credibility to the appeal.

As with the envelope, a second colour is often used, at times very effectively. Tasteful use of shading has been shown to make a difference in response.

Typeface and font are important. Make sure they're big enough to be read easily by people wearing bifocals.

There will often be frequent underlining or use of capital letters for added emphasis. Our firm is not convinced of the efficacy of these devices, 'though they are the product of research.

Component Brochures, flyers, leaflets and newsletters(may or not be present)

Function **Who**

This is another support piece to the primary sales item of the mailing. It tells the prospect more about the organization, sometimes giving it more of a human face; probably elaborates upon the organization's mission and its role in advancing solutions to specified problems.

It is a 'Show and Tell' piece. It provides additional information (sometimes it can include testimonials, rather than these requiring a second letter), often in a more visual way through use of photos and graphics. Its tone and manner should reflect the image you wish to convey. It will normally include the organization's charitable registration number, as well as its phone and fax numbers (and possibly email address), along with street (and if different, mailing) address.

Know what purpose you wish them to serve; what they are supposed to add to the appeal. Before creating one, ask if it *will* serve this purpose. Can you communicate something remarkable in a remarkable way?

Newsletters may be a major exception in the direct mail area. They appear to still work with the 'homespun' approach. They seem to be more welcome than aggressive direct mail. For some reason, people seem to view these differently from a direct mail appeal. There are a number of examples of newsletters producing significantly better response (in the order of a multiplier of 5-10) than more overt appeals. Donors seem to feel like they're being kept informed without feeling 'pushed'.

Good graphics and intelligent use of space can make a mailing a genuine educational piece. E.g. of 'wallchart' type enclosures.

Component The Lift Letter ('Publisher's letter', or Testimonial)
(Additional letter attesting to the credibility of the organization or its works)
(May or may not be present)

Function **Why & Who Else**

This is designed to lend weight and credibility to the appeal. These must be used with care, and should not be a restatement of the case already outlined in the main letter.

An additional letter from someone other than the original signatory of the appeal. Always shorter; Seeks to reinforce the primary letter in a different tone of voice. Sometimes a package contains more than one.

To work, must be seen to be realistic i.e. well designed, presenting an image substantially different from the original piece. Cannot look like continuation of original letter. May feature handwriting, or pictures. Must be on different letterhead and printing stock.

To be effective, a lift letter should offer a third-party endorsement from a slightly unexpected source. It may be read *before* the main letter, so it cannot afford to be predictable, verbally or visually.

Ideals to strive for: (a) It should sound like someone talking; (b) it should be great copy, in a distinct, and distinctive style; (c) it must be a second voice, with integrity; (d) its design should enhance the writing.

Component Donor Card or Reply Device

Function **How**

This is effectively the 'Order Form'. It tells the prospect how to effect her donation, and enables her to do so. It is normally affirmative in tone ("Yes!"…), will generally include the organization's logo and address, along with its charitable registration number and a note that income tax receipts will be issued (sometimes only if above a certain $ amount).

It provides a number of options ('tick boxes') regarding different amounts for contribution ('donor arrays'), different methods of payment (cheques; money orders; credit card information; increasingly these will also offer direct debit options) and terms of payment (especially if pledging is an option).

It may sometimes invite her to pledge for a larger amount which can be paid over time, suggesting she become a monthly contributor, perhaps by automatic debit. At other times it may invite the donor to receive additional information, or to inquire about becoming further involved through volunteering in some aspect of the organization's work or joining a particular special high end donor club.

It is extremely important that this be clear, easy to read, relatively uncluttered and easy to follow. Its use should flow naturally from having read the materials. The goal is to make it as easy as possible for the donor to give.

Component Reply envelope

Function **Where**

Tells the prospect where to return their donation, and by what means.

Sometimes will have postage paid and, if so, will often have a brief note reminding donor that this is a courtesy to them, but if they want to see even more of their dollars go directly toward addressing the cause, the charity will be even more grateful if they attach their own stamp.

Will contain the organization's logo, name and address, rarely the prospect's name and address, sometimes postage paid/business reply (usually accompanied by '*Your stamp will help us save money.'* note. Often there will be simply a marked space for postage to be applied: *'Your postage donation here.'*

Rarely, there may be some sort of affirmative declaration of the donor's support for the principles represented by the campaign. This is more common in commercial DRM.

Other Stuff:

Photographs and Illustrations

Photos and almost always work better than illustrations. Decision whether to reproduce it (i.e. enlarge or reduce or otherwise alter it to fit within the 'graphic scheme of things') or to preserve it in its original form. Which gives it greatest power?

Choice of photographs is critical. Avoid visual clutter. Let form follow function. Select photos based on their *power*. Should depict those who will be helped by the appeal, and should demonstrate the need for the work, along with a hint of what it will achieve.

The eye contact of one child looking straight into the camera lens is powerful and irresistible. The 'ET' phenomenon: faces of human infants, children.

Reproductions of newspaper clippings

Many people still believe what they see in print. This is another legitimate use of reference to third party endorsement to help validate our appeal.

People and Testimonials

The success of magazines like "People" and "Us", along with centuries of gossip, attests to the powerful hold which other people's lives and opinions hold over our imaginations.
People seem also to enjoy being associated with activities which particular other people are part of. Perhaps our need for affiliation, to belong, to identify with others in a common cause is at the base of such tendencies. Whatever, testimonials and other means of putting a human face to the appeal have a place in our fundraising.

Involvement Devices

An involvement device is something included in a package or mailing or event (usually something unexpected or slightly odd in the context, which will start the person receiving it thinking) in order to heighten the recipient's attention to the message.

Many examples which come to mind may seem crass, but they tend to work. The best of these will cause the person to read the enclosed mailing, by engaging the reader's brain. The most effective of these have relevance to the situation being addressed.

What happens if you give prospects something they can actually use in their everyday life? Does it increase response? Testing of enclosed useful gifts such as diaries, to do lists and planner/calendars have shown these devices to achieve considerable (as in 2.5) multiples of increased response when compared to the same appeals without the gift. The most effective response rates were realized when the gift was explicitly part of a 'Thank You' from the charity to the donor for past contributions.

The inclusion of such devices will of course increase the cost of your mailing, but they have been shown over and over again to work, so the question of using them or not is fairly simple: How much do they increase costs, and is that figure more than offset by the difference they make in returns?

Colour, Design and All That

We've already mentioned the different weightings for different aspects of the package, and noted (perhaps sadly for some of us creative types) that 'creative' may have the least weight. That does not mean that you need spend no time on this aspect of a mailing, or that there aren't some powerful exceptions which cause breakthroughs in response.

Charity appeals oriented toward children, in particular, can often benefit from creative use of colour or graphics on the envelope, as well as in the body of the appeal.

What you should know before calling Canada Post:

Bulk Drop or Addressed?
City/Region/Province/National/U.S./International beyond U.S.?
Quantities?
Timing: When?
How many mailings?

What to include in any follow-up mailings:

Acknowledge the existing relationship
Mention the previous mailing
Indicate your reason for writing the second time (i.e. normally, no gift received; other special circumstance)
Make your request
Mention "If you've already sent your gift…" and include a Thank You as well as an apology
Remind them that any amount is appreciated
Thank them again for their consideration and support.

Timing

The strike by Canada Post workers in November, during the traditional pre-Christmas mailing period, gave us plenty of insight into the importance of timing to fundraising success. And Christmas appeals will no doubt continue to be critical to Canadian charities, even as the nation's population grows in ethnic and religious diversity.
Are there other times of the year that might be worth considering as potentially good opportunities for 'seasonal' fundraising?

Although Easter Seals still seem to attract donations, at first blush the answer seems to be 'No'. That doesn't mean there isn't some other possibility, but the evidence so far doesn't suggest any particular period of the year with anything like the pull of Christmas.

Locally, November, August and October have been the most productive months for DRM fundraising.

There do seem to be times to avoid: Summers don't tend to be particularly productive, and springtime isn't particularly verdant, either. Locally, June is an abysmal month for fundraisers, and should be avoided.

Some Timing Guidelines:

Avoid competing with distractions like elections and Olympics, unless your cause is one that can somehow benefit through connection to the event.

Communicate when you have something especially timely to say, or when your cause is in the headlines. Take advantage of the power of significant newsworthy events to maximize fundraising. In the section on developing a Communications

Plan, we have discussed the impact of disasters and emergencies upon people's willingness to give. Ignore such truths at your peril. ***Fundraising has always worked best when the need is felt to be urgent.*** **Remember to constantly strive to** ***create the sense of event*****.**

Finding new donors and retaining the donors you have - Database Management

Recruitment, Acquisition, Attrition, Prospecting

Testing

Organizations which have tremendous resources can afford to engage in extremely sophisticated testing. However, as in any other domain, it can be overdone. Remember the leverage points. The audience is the biggest variable. So, while not testing at all isn't a good idea, over-testing or testing the wrong things, especially when carried on ad nauseum, is just as bad.

One important point; a testing-specific variation on 'Murphy's Law', true far too often to ignore: "The rollout will never perform as well as the test." Be forewarned.

Some Testing Guidelines:

Be circumspect in your testing. Test what you want to use later, to see if it's worthwhile to do so. If you're not likely to use it, why test it? Limit the variables – test one thing at a time, if at all possible.

Make sure your testing is done with quantities that are sufficient to give you statistically significant and practically valid data. If you don't have enough volume to make it likely that you'll get reliable data, wait until you have a sufficiently large list to make testing worthwhile. Do not test for testing's sake, ever.

By definition, your 'control package' is your most effective money raiser. The only time you'd test against it is if you have very good reason to believe you can better it, or if it is no longer producing the results you need. Make sure you don't get caught up in a fruitless quest to expand human knowledge. You're trying to raise funds. Where testing can help you do this, go ahead. Otherwise, leave the pursuit of knowledge (in this realm) to others.

Thinking Audio-visually

Audio cassettes have been in use in fundraising for over a decade. They can get your message to individuals who otherwise might not receive it. For reasons of cost, you must be selective. You may wish to include a 'return when finished' option so it can be reused for additional prospective supporters, or use it to invite yourself for a personal visit, to engage in a face-to-face meeting and to pick up the cassette.

But the power of real people speaking in their own voices cannot be duplicated by any but the very best letters. Both cassettes and videotapes typically generate responses that are far above average for a comparable direct mail appeal, even when both are aimed at relatively reliable supportive clusters of prospects.

It may be possible to have production costs donated by a media sponsor, and to promote this as a way of thanking the sponsor while reassuring prospective donors that their money won't be 'wasted' on such fundraising frivolities.

Videotapes, because of their additional expense beyond even the audiocassette, tend to be used as part of a highly targeted two-part, major gift appeal. Another use is as a reward. The request for return feature is similar to that of the cassette, but the personal visit in this instance is almost a requirement. Videos are being used increasingly in legacy campaigns, for obvious reasons. Another creative and highly productive use of videos is in combination with invitations to participate in important singular events in the organization's history, such as 10th, 25th, 50th, etc. anniversary celebrations for charities, grand openings of new buildings or new additions, etc.

Ideal lengths for these tend to be between three and fifteen minutes (3-15), but *never* over fifteen (15) minutes, with most under ten. There is more and more experimentation going on using videotapes in combination with a variety of other forms of appeal. Stay tuned or, if you're in a position to do so, become part of the experiment.

To determine if the additional costs are worthwhile, test in the usual comparative fashion.

One thing: If your video doesn't have top quality production values, *forget it*.

Telephone Marketing/Campaigns

You'll remember Canadians' complaints about the intrusiveness of telephone calls. You've said yourself, "Why must they always call at supper time?"

So, why are call centres one of the Atlantic Provinces' growth industries, and why would you consider telephone fundraising? Because it *works*.

After face-to-face contact, the telephone is the second most personalised means to communicate. Why? Because it is a genuine person-to-person *exchange*. Although the two people can't *see* each other (yet), they can interpret nuance, something that other means of communication which are one-way don't allow.

Telephone fundraising is a great revenue generator and, depending on how they're organized, telephone campaigns can be very cost effective. The telephone is especially effective when used to *complement* another fundraising medium.

Some uses of the telephone:

Acknowledging donors
Reactivating 'lapsed' donors
Launching widespread special appeals within a brief time-frame
'Upgrading' donors to a higher contribution level
('Gift clubs, Monthly Pledges, Sustainer programs)
Intensifying relationships with Pledged donors, to improve fulfillment rates
Combination Mail-Telephone appeals (Significantly improves response rates)
Informing and educating donors
Building donor loyalty
Prospecting for new donors (Doesn't tend to work as well as mail)

Media Ages

Newspapers are 250 years old.
The telephone is 100 years old.
Radio and television have been around for 50 years.

The Foundation Sector

The Foundation Sector accounts for 4% - 5% of all private funding for charities in Canada.

Two essential points:

1. **Foundations differ significantly from one another**

2. **The relationship between a foundation and a Not-for-Profit or charity fundamentally is one of partnership**

Foundations differ significantly from one another

Many types: Family (private), community, corporate and special interest are the most common. There are significant differences in size, dollars available, staffing, areas of interest, granting procedures, etc.

You must do careful preliminary research to find out as much as you can about each foundation's interests, application criteria, procedures, dates, etc.

There are a number of sources for information, many available through your public library. *The Canadian Directory to Foundations; Rainforest.* Also, some foundations issue annual reports.

As well, talk to organizations that have had success applying to foundations.

Generally, you can telephone many foundations directly and speak to staff people there before applying to the foundation.

The relationship between a foundation and a Not-for-Profit or charity fundamentally is one of partnership

Foundations exist to give money away. They want to achieve good things by doing so. Those with paid staff, in particular, are often willing to devote some time to exploring your idea with you. They wish to have a cooperative relationship with grant recipients. They feel that you are very much "in this together", as they want to fund valuable projects, and they want the projects they fund to succeed in their objectives.

At the same time, applications to foundations are increasing exponentially due to government cutbacks and increased knowledge by Not-for-Profits. So, respect their time as you would have them respect yours.

The Proposal

While other sections of this booklet offer detailed hints on writing well for fundraising, a number of points worth noting follow:

1. Be inventive and positive. Express your ideas clearly and succinctly.

2. Be realistic. Don't promise global changes from your efforts (other than in the unlikely event that these are within the bounds of probability for the program).

3. Be factual and specific. Don't generalize in vague terms. Be able to substantiate any claims you make. Respect the foundation and yourself. Don't grovel or beg.

4. Be clear how your project will address the need you have identified, and stress the benefits of your program to others rather than your organization's needs for money. Money alone is unlikely to solve many problems.

5. Be readable. Refer to the "Writing for Fundraising" section in this booklet for hints on language, vocabulary, style, etc. Avoid jargon.

6. Be credible. Give details, provide examples, explain how and why your organization has the experience, expertise and resources to complete the program you're proposing.

7. Be authoritative. Show that you know your field and are aware of what's being done currently by others in the field. Don't claim uniqueness unless your project idea truly is unique.

8. Be clear about your own priorities. Don't send a shopping list in the hope that the foundation will identify a possible program for you. Apply for support for specific discrete programs or projects, wherever possible.

9. Be readable. Refer to the "Writing for Fundraising" section in this booklet for hints on language, vocabulary, style, etc. Avoid jargon.

10. Be selective. Let the foundation know you've done your homework by fitting your request to their criteria. Avoid 'blanketing' a number of foundations with the same request. Many times, they talk to one another.

11. Be organized. Coordinate all proposals through an approved channel within your organization.

12. Be accountable. Present accurate budgets, with nothing hidden, to reflect the care and attention to detail represented by your program. Annual financial statements will normally be required.

13. Be responsive. Some foundations want to see preliminary documents, evidence of planning at each stage, etc. Others are mainly interested in the final proposal. Know which foundations want which items, and fulfill their requirements.

14. Be distinctive without being extravagant. Your proposal doesn't need to be overly 'fancy' or 'flashy'. In fact, this can work against you. At the same time, the proposal should be crisp, clear, clean and distinctive in form as well as content.

15. Be practical. The person in your organization who can best combine writing skills with an intimate knowledge of the program is the best person to develop the proposal. If their schedule makes it difficult for them to find the time to write the proposal, arrange to have others help them with their daily tasks until the proposal is complete.

16. Be punctual. Make sure you're aware of the grantor's funding cycle, and plan your proposal to fall within it. "Rush jobs" and "last minute requests" do not leave favourable impressions.

17. Be straightforward about your organizational status. Most foundations will expect you to offer evidence of future support and organizational stability. Be specific and substantive in providing this information.

18. Be responsible and communicative. Include a plan for evaluation within your proposal. The foundation will be interested in learning the degree to which you were successful in meeting your objectives, and reasons for any alterations, adaptations, or changes in goals.

After the Decision

If it's a "Yes"

Say "Thank You". Then keep the foundation informed of your progress through regular reporting. Send copies of news briefs, press releases, publications, pictures of events, etc.

Consult with foundation staff to determine proper wording, logo, etc. then credit them at every appropriate opportunity for their contribution to your work. Send them copies of all such acknowledgments.

Meet all deadlines, with appropriate content, in the correct format.

Invite the foundation staff and board to be involved, or to witness any aspect of your program, to the extent they wish. Make it clear that they are welcome to do so.

Issue receipts promptly. Foundations require proof of payment for their auditors.

If it's a "No"

Say "Thank You" for their consideration. Sometimes it is appropriate to (tactfully) contact their staff person, or whomever you've been dealing with, to follow up on the specifics of the refusal, with a view toward future applications. Be discreet, and polite.

Develop a relationship with the foundation. Keep them informed of your organization's ongoing programs, and achievements.

Where appropriate, acknowledge any past rejections of other proposals. You are hoping to establish a relationship with the foundation, and honesty must be the basis for any such partnership.

Preparing a Case Statement

FUND DEVELOPMENT COMMUNICATIONS STRATEGY: MAXIMIZING YOUR CASE

Sample Timetable for Case Statement

Preliminary information from client	January 21, 1998
Initial research, interviews to prepare Case Inventory	January 21 - 28, 1998
Writing and editing	January 29 - February 12, 1998
Review, revision and approval	February 12 - 27, 1998
Printing and mailing	March 1-7, 1998

FUND DEVELOPMENT COMMUNICATIONS STRATEGY: MAXIMIZING YOUR CASE

Case Statement

The Case helps to build consensus and understanding within the prospect and client community regarding fund development priorities. It also serves as a useful reference for the education of key volunteers and as a source of information for specific proposals or solicitation packages.

The immediate requirement is for the development of a Case Statement outlining needs which recur from year to year or those needs which are exceptional, such as capital projects -- but which also have appeal both to a broad range of donors and to specific constituencies the institution has cultivated in anticipation of requiring their support.

A *case inventory* can subsequently be developed as a resource and collection of information for reference throughout the campaign period. It helps to clarify the vision for the program and identifies areas of need in priority order.

The case inventory process informs, involves and stimulates institutional leaders, stakeholder representatives and campaign volunteers and staff.

Both the case statement and the case inventory must address the issues and needs of all stakeholders in a credible manner and prove the needs are realistic. It must be constructed to suit a number of audiences.

FUND DEVELOPMENT COMMUNICATIONS STRATEGY: MAXIMIZING YOUR CASE

The audience for the Case for Support might include:

1. **Individual Directors/Trustees/Governors**
2. **Individual Members/Subscribers/Alumni/Patients**
3. **Individual Friends**
4. **Business/Corporations**
5. **Charitable Foundations**
6. **Associations/Societies**
7. **Government**
8. **Others as appropriate**

FUND DEVELOPMENT COMMUNICATIONS STRATEGY: MAXIMIZING YOUR CASE

Case Trends

There is an increasing need for accountability and the appearance of accountability for donors and prospects. An emphasis on the flexibility of case inventory components is required. As much as possible, an organization must use a "mix and match" approach to documents.

More and more often, tailored proposals, cases and other materials developed for large gift prospects or special constituencies must be carefully individualized. A case inventory or a summary Case for Support must look professional but not excessively expensive. Production of printed materials might include a limited use of colour but would rarely include full colour.

Crucial information must be collected in order to successfully build a persuasive case. This includes information on the organization's vision, mission and activities. Business management, financial needs and the economic impact of the institution must be measured and documented.

Public and stakeholder opinion requires study and active communications to address any issues. The potential for raising funds and the capability of the community to support the project must be addressed.

FUND DEVELOPMENT COMMUNICATIONS STRATEGY: MAXIMIZING YOUR CASE

Seven Steps to a Preliminary Case Statement

1. **Identify the purpose of the case.**
2. **Develop a list of the audience and stakeholders.**
3. **Identify preliminary themes, length, format and media for presentation and initiate tendering process for suppliers.**
4. **Develop a list of representatives of key stakeholder groups, and of key staff and volunteers responsible for service delivery and capable of articulating the institution's vision.**
5. **Interview these individuals using open-ended questions which will generate both qualitative and quantitative answers.**
6. **Confirm the priority order of the needs and the funds required.**
7. **Draft the case materials and circulate for approvals and changes.**

FUND DEVELOPMENT COMMUNICATIONS STRATEGY: MAXIMIZING YOUR CASE

Sample Format/Outline for a Case for Support

Section 1 Executive Summary

Section 2 Summary Information/Thesis/History

- **Interest: What do we do that is different/better/unique?**
- **Impact: What kind of impact do we have?**
- **(Quality of life, on individuals, on community, other?)**
- **Motivation, vision: What is the organization's mission?**
- **History: Have we demonstrated our ability to serve the community?**

- **Confidence/credibility: What are our greatest accomplishments?**
- **Development over time (when was it established?, by whom?, what was its original mission? how has it grown?)**

Section 3 Current Activities

- **What is the current strategic/business plan?**
- **Who are our constituencies?**
- **What kind of service do we provide?**
- **How efficient and effective are we? What are the measures we use?**

Section 4 Areas of Need/Solutions Proposed

- **Why need exists/how it affects service?**
- **Who determined the need and how was this done? (strategic approach)**
- **Who does this need affect?**
- **When will the solution be implemented?**
- **What are the measures of success?**
- **How much will this cost and who did the costing?**
- **What economic impact will this project have?**

Section 5 Endorsements/Broader Impact

- **Who has already endorsed the project? (Government, media, community representatives)**
- **What is the general significance of the project?**

Section 6 Opportunity to Contribute, with Appropriate Donor Recognition

FUND DEVELOPMENT COMMUNICATIONS STRATEGY: MAXIMIZING YOUR CASE

Defining Key Themes and Unique Selling Features

Sample Questions to Consider

1. **In your mind, what makes your institution unique or special? What are the benefits to having the institution exist? How does the institution benefit this community and how does it work with others to benefit the community?**

2. Define the mission, major philosophies and stakeholder groups of the institution in your own words. What do you think they should be?

3. In your mind, what are the key accomplishments (intangible as well as tangible successes) of the institution?

4. What do you believe the institution's public image to be?

5. What is the institution's vision for the future? Where is the institution heading?

6. What is your role and your program? Include financial information and statistics about who you serve and how many. What makes these services essential to the community?

FUND DEVELOPMENT COMMUNICATIONS STRATEGY: MAXIMIZING YOUR CASE

Writing a Major Gift Proposal

In today's fund raising world, the ability of a not-for-profit organization to capture the attention of key decision makers -- either individuals or in corporations or foundations -- is dependent upon its capability to articulate a uniquely desirable relationship between the organization and the prospect.

The donor's world is increasingly a sophisticated one -- with many worthwhile choices for the donations dollar. In addition, although many donors are budgeting for fund raising, they are also increasingly focusing their gifts to a select number of recipients.

The not-for-profit world is thus faced with "making a case" in a major gift proposal which will employ the art of persuasion in as genuine and relevant a manner as possible. In every major gift proposal, the following elements must be considered:

1. Brevity and clarity of the case/project

2. Personal and/or organizational relevance

3. Personal and/or organizational relationships (proposed and existing)

4. Demographics and Psychographics

5. Tailoring

6. **Credibility and history of organization**

7. **Accountability of organization and the project**

8. **Professionalism and ethics of approach**

9. **Images**

10. **Donor recognition and appropriate acknowledgement**

Writing for Fundraising

Much of what follows is borrowed from or inspired by two Georges - Smith and Orwell - both British, neither a lawyer, but both excellent writers. As it happens, they also share a certain curmudgeonly mischievousness when it comes to pricking holes in the balloons of linguistic pretension. I've added a number of my own wrinkles, for which neither George should be blamed.

And before we begin, remember to have faith in the value of what you are doing. Yet another George - G. B. Shaw - once said: "All great truths start as blasphemies." Someone will always say 'it won't work.' They are almost always wrong.

Thoughts on writing for fundraising

Good writing for fundraising is good writing. It has power, immediacy and warmth. It is personable and enthusiastic, and sometimes - carefully, please - even humourous. The need is clearly articulated and made tangible, as is the offer. Most importantly, good writing rings true; it elicits recognition from the reader. At its best, it can be genuinely sensitive and moving, sounding like one person, one human being talking to another about something that is very important to both of them.

There are some mundane prior considerations: Make sure you've got the person's name and address right, and make sure you spell both correctly. Avoid typos. Proofread your text. Get to the point quickly on every page, and keep the number of pages within manageable limits.

If your target audience is made up largely of older people, remember they may have trouble reading small print. Anything under 11 point gets tough for people wearing bifocals; even 11 may be stretching it. Most of this package is in 12 point or larger.

Your audience is *not* captive. If you're appealing to business leaders, many of them will not wish to devote much time to your letter. Estimates vary, but you probably have to capture their interest within the first 30-45 seconds (or less), or risk losing them entirely.

Further thoughts on writing for fundraising

Find your own voice. Develop your own sense of language in which to communicate a message which is uniquely yours.

When fundraising, you are often writing to a reader who has not subscribed. You are, to some extent, intruding. Make your point simply and powerfully. Your writing must be accessible; your meaning must be clear.

Write to *some*body, not everybody. Know who you are talking to, and what you are asking them to do. Have a 1 to 1 personal conversation with the reader. Can you make the message seem important, urgent, without going over the top?

There is a limit to how much the prospect wishes to know about your organization. It's essential to depict as specific and as urgent a need as possible. The power of the specific need is greater than the attraction of the organization reporting it (for evidence, consider any recent disaster). Be aware of the value of news coverage in fundraising.

With few exceptions, deciding whether to make a gift to your charity is not the first priority of most readers' working day. Nobody jumps out of bed in the morning and says to themselves "Hmm, what charitable cause can I give money to today?" Nor is giving money a routine activity. It happens when it is provoked, or evoked, by people thinking something is important enough to act upon.

Marketers search for some quality which will make their product distinctive; some characteristic which will create a sense of their product as unique. They seek to make a difference in the minds of consumers. The same principle is valid for fundraising. Escape 'the tyranny of the formula!'

Create a personal 'sense of event'. Giving should be memorable. People can be persuaded to give by elevating the importance of the gift. Can you have the reader think s/he has done something remarkable today by making this gift? Can you make giving important and distinctive?

Be brief. Winston Churchill was famous for demanding brevity from those reporting to him: "Pray, on one side of one sheet of paper, provide me the details..." and, "Out of intense complexities, intense simplicities emerge." Retain the essence: but Simplify.

Also, have you made it simple for the reader to respond to your request? For Direct Mail, the need to simplify affects the reply form. 'Always write the order form first' is a good rule. Order forms and 'response devices' aren't fun to write. Don't be put off. Do it first. Make it user-friendly. It should tell the reader what you want them to do, and show them how to do it. Make it big enough, to make it easily read, and to give it status. If all goes well, the reader will send it back with a gift. It should feel important.

Remind readers what they are achieving with their donation. Say "Thank You" properly; not simply with the words, but with every aspect of the appeal and response form. The form should be an integral part of the appeal.

And now, direct from England...

George Smith, in his recent book Asking Properly quotes the other George - Orwell - from his Politics and the English Language, written in the 1940's but which resonates today. Orwell raised six questions writers should ask themselves:

1. What am I trying to say?

2. What words will express it?

3. What image or idiom will make it clearer?

4. Is the chosen image fresh enough to make the effect?

5. Could I put it more shortly?

6. Have I said anything that is avoidably ugly?

Orwell offered six more questions, presenting an even more difficult standard to reach:

1. Never use a metaphor, simile, or other figure of speech you're used to seeing in print.

2. Never use a long word where a short one will do.

3. If it is possible to cut a word out, always cut it out.

4. Never use the passive voice when you can use the active voice.

5. Never use a foreign phrase, a scientific word, or a jargon word if you can think of an everyday English equivalent.

6. Break any of these rules sooner than say anything outright barbarous.

While some of Orwell's commandments may be open to argument, his verdict on modern writing is memorable:

> "Modern writing at its worst does not consist of picking out words for the sake of their meaning and inventing images to make the meaning clearer. It consists of gumming together long strips of words which have already been set in order by someone else, and making the results presentable by sheer humbug."

Orwell wrote this in 1946. Here's what he wrote about grammar in 1950:

> "Correct grammar and syntax are of no importance as long as one makes one's meaning clear."

This, along with Winston Churchill's famous "...up with which I will not put!" retort are handy quotations to have available when someone complains about a sentence ending with a preposition, about one beginning with 'And', or about a split infinitive.

So, (within reason), grammar matters less than grace, and content matters more than syntax, 'though both grammar and syntax do matter. In writing for fundraising, what matters most is the power language can give us to convey emotion, need and possibility.

What other 'rules' might be helpful? These are George Smith's, with my comments:

Use more Saxon words than Latin ones. Saxon words are shorter, more forceful.

Use vivid words rather than hackneyed ones.

Use short sentences and short paragraphs, and vary the lengths.

Get to the point!

Use active verbs, not passive ones. A lot of people seem to think the passive voice makes them sound objective, or perhaps more corporate. It always reminds me of high school science lab reports. I stopped going to labs because I couldn't stand writing those god awful reports. The passive voice takes you out of the exchange. The writing that results sounds bureaucratic and cold, and actually reduces the reader's involvement.

Relate the story to the reader. Remember donor motivation. Good writing cuts through the haze, implanting a powerful thought in the reader's mind, with emotion.

Ask for money not support. Smith believes we are too self-conscious about the 'M' word. While it's okay to speak of 'resources' occasionally, if *all* we speak of is 'help', 'support', 'contributions' or 'commitment', he feels we risk having the reader miss the point. Smith thinks the word 'money' deserves a place in our fundraising vocabulary.

Use 'I' and 'You'. Avoid the first person plural unless it accurately represents who's writing. The corporate royal 'we' sometimes is appropriate, oft-times not.

Your writing should sound like someone talking. Does the text fit into regular patterns of ordinary human speech? There is a difference between the way we speak and the way we write. Writing is usually more complete in expressing a whole thought. Speech takes listeners' visual cues into account, at times letting an 'understood implication' replace words. But the difference should not be so great that writing doesn't sound human.

Our writing requires enthusiasm, but not hype, to talk with the reader about important issues. We need passion, honesty, conviction and urgency, not hysteria or shrillness.

Test your writing by reading it aloud, first to yourself, then to another person. If they laugh where you didn't intend humour, you've got a problem. If they fall silent, listening intently, you've made an impact. If they're on the verge of tears, you have a great piece of copy. This is not crass. It's possible for honest emotion to be honestly evoked.

George Smith's Five 'Deadly Sins of Direct Marketing Copy'

Polysyllables

"Verbosity suppresses simplicity." KISS. Simplicity is powerful and universal, and lies at the heart of what we're trying to achieve.

Tautology

Redundant words. Awkward or clichéd phrases resulting from these: "Died of a fatal dose"; "first discovered"; "a major nuclear disaster".

Jargon, especially exporting Internal Jargon

Specialist language: inaccessible to all but the 'chosen'. Such language can be a useful form of shorthand in daily work. There is no excuse for inflicting it on donors.

Thoughtless, "By the Numbers", Robotic Prose

Going through the motions, with your mind switched off. The best writing will engage the mind of the reader. To do so, it must previously have engaged the writer.

The Comfortable Cliché

"Avoid Clichés like the Plague." 'Though it is possible for an artist to use cliché creatively, through ironic inclusion within a passage, the ability to do so is rare.

Certain words become clichés through overuse. "Exciting" comes to mind. Some of these become redundant adjectives or adverbs, thus: "Viciously attacked". This habit robs otherwise powerful events and conditions of their impact, through use of empty words and phrases. Edit your work mercilessly.

And Five Challenges

Be Personal. Consider writing in the First Person Imperative.

Be Candid. Tell the Truth. Seek ways to be more honest with your readers.

Be Brief. 'Brevity is the soul of wit' is but one of the trenchant lines in Hamlet. Can we learn to get our message across *swiftly*?

Dare to Experiment with Rhetoric. Are we afraid of eloquence? Or embarrassed by it?
Can we adhere to principles of simplicity and still find a way to write with flare? Rhetoric is, by definition, exciting, motivating and aspirational. Dare we reach for poetry; passion?

Rewrite everything, even as you write it the first time. The best writing in every field is the result of extensive, painstaking rewriting. It's worth the additional effort to make your appeal fresh and genuine, to invest it with straightforward integrity.

Continually challenge yourself, in every phrase you write.

A couple of notes about process within organizations

Too many organizations want the prose to be in their particular jargon, the language, or worse yet, the acronyms, they breathe everyday; all within a context which they understand perfectly but which is incomprehensible to any human being outside the specific working environment they inhabit.

"Too many cooks" aptly describes the approval structure favoured by too many organizations. This can be especially wasteful when professional counsel has been engaged, in which instance time is, literally, money.

A formula: AIDA (Attention; Interest; Desire; Action +P/C)

Attention - Get their Attention with a headline, an opening sentence, photograph, etc.

Interest - Arouse their Interest, building on the attention you've gained. Develop the selling argument.

Desire - Cultivate their Desire (WIIFM?) Switch from general virtues to more personal application. "What's in it for me?"

Action - Move them to Action (Close the Sale)

And a slight modification - Proof or Conviction

Include 3rd party endorsements for support (e.g. Case histories; Testimonials)

Another list of 'Deadliest Sins in Writing Fundraising Copy'

1. Writing the same letter to donors as to prospects

Attempting to save money and time could cost you both, and a valued donor.

2. Narcissism

Assuming your organization's aims and goals are so self evidently interesting that you don't have to be creative in making it clear *why* they are.

3. Assuming the reader already knows

Thinking the reader knows more about your organization than she in fact does, and thereby failing to tell her enough.

4. Telling the reader too much about you and not enough about the benefits

The reader only wants to know so much about your organization. He's really interested in learning how what you do will help his intended cause.

5. Telling the reader your needs are more important than hers

Taking full credit for the wonderful deeds of the organization, without giving any to the prospect or donor.

6. Insufficient attention to the reader's needs as a prospective donor

Failing to understand why a person might or might not want to offer support to your cause. Neglecting to include the real or psychic paybacks in your pitch.

7. Neglecting to say exactly why your organization needs the money, and to show how the gift will solve the problem you've presented.

Make it clear what the prospect's gift will accomplish.

8. Failing to ask for a specific gift amount or range, or 'forgetting' to ask at all

9. Failing to say "Thank You" for the reader's time and consideration

10. Failing to say "Thank You" in a gracious and timely fashion when the reader responds with a gift (Truly the deadliest sin of all)

And one last list -- 'Cardinal Rules' of Writing Fundraising Copy

1. Write to just one person.

2. Focus on motivations.

3. Describe the nature of your work.

4. Define the need.

5. Tell how the need is being met.

6. Get the reader personally involved.

7. Demonstrate that you have widespread support.

8. **Show what the gift will accomplish.**

9. **Promise a reward for giving.**

10. **Ask for the contribution. Express or imply gratitude.**

11. **Be brief.**

12. **Tell the Truth.**

Developing an Effective Communications Plan

Much of the time, in public affairs, Perception is much stronger than Reality. This relationship has nothing necessarily to do with what is 'True', and more often than not, even less connection to what is 'Fair'. So, influencing public perception can be an important factor in reaching your fundraising and program goals.

Communications and Marketing programs are frank attempts on your part to influence favourably the opinion of others toward your group. You *are* trying to have an active impact upon the way you and your work are seen. Many NfP's feel they can't afford a C/PR Plan. Still, many who have hired 'fundraising' staff have actually hired a PR graduate, so ingredients for a program may be in place.

In this section, we will share some ideas about positioning your organization in a planned fashion. It's an approach you may find helpful. At the same time, never forget that the bottom line is to Tell the Truth.

Many of the largest Not-for-Profits (NfP's) throughout North America are realizing they need to have good Communications/Public Relations (C/PR) plans if they are to achieve their overall goals. NfP's are borrowing Direct Response Marketing (DRM) strategies (segmentation, donor relations, etc.) from the DRM commercial field in their approach to fundraising, and now they're doing the same with Communications strategies.

Communications Challenges -- In a planned fashion, you are seeking to:

Increase public awareness of your organization's purpose and needs;

Position your organization with current and potential funding sources in specific ways, as a valuable contributor to society; and

Create an enhanced environment in which to raise funds, to recruit new volunteers, and to educate and persuade target audiences about selected issues or causes.

The Need for an Overall Strategy

PR must be seen as an investment, requiring a Return on Investment (ROI). 'PR by press release & PSA's' is no longer enough if you don't want to be 'the best kept secret in town'. What are you looking for in designing your C/PR Program? The program should:

A. **Build awareness of your organization and position it as a valuable contributor to society.**

Question: **What would happen if your organization closed its doors tomorrow? What would be irretrievably lost to the community you serve?**

B. **Build an environment which will ensure your PR Program will enhance fundraising and enhance volunteer recruitment opportunities.**

C. **Educate and persuade your target audiences about an issue or a cause. Thus, a strong PR Program will support your fundraising and your Core Program.**

Are you accomplishing these three things?

Elements of a Successful C/PR Program:

Develop a Written Communications Plan

Know your Management Approach: MBO; MBWA. But, beware of MBGI (Management by Good Idea), vacillating from one idea to another because it seems like a good thing to do. To avoid such distractions, you need:

Written Annual Communications/PR Plan: Every action, item, event, brochure, press release, etc. ideally would be encompassed within this plan, would be designed to further the goals outlined therein, and would measurably advance the overall plan.

Structure this like a Marketing Plan: Begin by doing a Situational Analysis -- 2-3 pages describing the current situation; what is the case now, from a PR perspective? What is happening? What is the Opportunity? What are the obstacles? What is/are the goals?

Next, Identify your Objectives. If you could accomplish only one thing this year, what would it be? If two, what would be next? Etc. Establish a Time Line for each aspect of the plan.

Use the SMART system as outlined in your Strategic Planning exercise. Make objectives Specific, Measurable, Agreed upon, Realistic and Time-based. Establish a means to measure your progress - how will you monitor and evaluate your activities toward the goals and objectives you've outlined? DO NOT try to list too many -- more than three or four will probably guarantee you'll be trying to do too much and get waylaid.

Determine what Key Messages you wish to communicate to target audiences. Determine who is in your Target Audience. Who, primarily, are you seeking to communicate your message to? Specifically what do you know about these people, their habits, where they get most of their information (i.e. what forms of media, etc.)? Determine what Mix of which Target Media you will use as the channels through which to communicate your message to your Target Audience, and reach your objectives.

This doesn't mean you eschew all attempts to communicate with the larger, more generalized public audience. Take advantage of opportunities, but do so with a view to their complementarity to the preferred, strategically defined audience. Measure the impact of each opportunity within the scope of its corollary effects upon your Target Audience.

Strategies:
How to get the right media to carry your preferred message to your target audience within your plan, and within your ideal time frame

Make sure you understand the Strategy/Tactic Distinction re people; resources; etc. Tactics are the 'nuts & bolts' of what you'll do in order to reach your Strategic Goals.

Plan for Resource requirements: What will it cost, in dollars, people, equipment, etc. to reach your goals?

What happens if you perform a resource analysis and find you can't afford everything you want to do? Bring your working group back together, or go back to your ED/CEO and say "OK, which of these Strategies, Tactics, Objectives do we <u>not</u> want to do?" Decide responsibly whether to put more money in your C/PR budget or to cut things out.

The Time Table is critical to putting all this into perspective. Establish a Time Line. Make a simple chart listing all tactics, then figure out when you will do everything. Plan completion dates for each tactic. Plan, Execute the plan, and Follow-up as needed.

Implement Clear Measurements: Know if you are spending enough time & resources to accomplish the goals of the organization. Are you achieving them?

Ideally, *all* possible objectives *must* be readily measurable. Clear Objectives allow you to see if they've been achieved, and ensure no silent 'hidden objectives' (which may or may not spring from hidden agendas) go unmet because they didn't get mentioned.

Beware when someone says of an idea for an event or activity, "It'd be good PR." This generally can be translated to mean "We can't find any good, compelling reason to do this, but *maybe*... 'it'd be good PR'."

Develop an Issue/Event oriented approach to Communications/Public Relations
This is a key tactical component in most well-managed current C/PR strategies. Steps:

1. **Identify an issue. Pick the issue.**
2. **Persuade the Target Audience that it's important.**
3. **Position your organization, especially in the Target Audience's minds, as a key part of the solution to this important problem.**

What you're looking for isn't so much *public* relations, to reach everybody, as it is "*Constituency Relations*". If you identify exactly WHO you want to reach and exactly WHAT you want them to know, it will lead to far more effective C/PR than if you continue to try to get the same message out to everybody.

Major media don't tend to highlight positives. They're not considered newsworthy. But, disasters are newsworthy, which is why they work so well to ignite fundraising efforts.

So, how can you have an impact on getting your issues on the front page? (e.g. the Anti-VLT Gambling group's taking advantage of the upcoming election). How would a *Constituency Relations Program* (CRP) work within the Written Communications Plan you've already developed?

Overlay a Constituency Relations Matrix (CRM) on your written plan to Identify, Prioritize & Target. Identify your Target Constituencies as your chosen audience(s). Now prioritize these (1, 2, 3, etc.) then ask yourself:

"Who are they & what does each group *think* they know, or believe about us now?"
"What do they know, or think they already know, about our organization?"
"Where do they get that information? Through what media do they get their information?"

Next, decide what you *want* them to know about your organization and what you do.

Now do a GAPS Analysis: Here's what they appear to know now. Here's what we want them to learn. Identify the GAPS between the two.

Now choose Communications Vehicles you'll use to bridge the gap. Once you've decided these, the task becomes one of marketing the ideas through these channels, over a specified time period, toward a specified goal set, after which time you'll be able to evaluate how you've done with your plan.

You *can't* have them know everything, so pick, on a priority basis, 2 or 3 items that you *really want them to know* about you. Then, market these ideas to them, so they'll come to know these things about you. When you're satisfied with their retention of this information, pick two-three more facts you'd like them to know, pick your preferred communications channels, and repeat. After a period of focused effort, you'll have created a reasonably accurate appreciation by your chosen audience(s) for the comprehensive range of your organization's services.

Events created for a Communications Purpose are another wrinkle on this theme. The VLT lobby mentioned above has several examples in its brief history.

Consider including a Government Relations Program Initiative within your C/PR Plan

Position your organization as a valuable resource. Get connected. Follow through. Long before you need anything from government, get in the habit of providing regular information and other assistance to them. Develop relationships.

This could include lobbying, but doesn't have to be just lobbying. It should involve some kind of planned, regular networking to build a platform from which you can develop positive awareness of your organization on the part of key government leaders before you need their help. Build a relationship long before you need them -- Get Connected.

It could be a regular briefing exchange. Provide information to them; troubleshooting, neighbourhood awareness, etc. Become the organization they turn to for expertise and help on particular issues or in a particular area.

Media Training for every volunteer or staff person who might have to deal with the media in any capacity or situation

Consider providing Media Training for every volunteer or staff person who might conceivably have to deal with the media. It is worthwhile to invest time and resources in this before it is needed. Ideally, nobody will represent you in press conferences, media interviews, television appearances, etc. without being media trained. Get people trained.

You've gone to the effort to build an excellent Communications Plan. When a key spokesperson gets the chance to speak to assembled media about an issue, be sure the message and its delivery achieve your Communications goals, not scuttle them.

Manage **your spokesperson and the message, to ensure you communicate YOUR meaning to your audiences. Your objective is to deliver a specific, planned message to the audience (including your Target Audience) that will motivate them to view your organization in a preferred way, then follow up with preferred actions -- volunteering, giving, joining your board, writing to a politician, showing up at a demonstration, workshop, etc. Make sure you take optimal advantage of this rare opportunity.**

What about a Crisis Situation?

Use a Constituency Relations Grid to enable everybody within the organization to focus their attention on what really has to be done, what audiences *have* to be reached, in what ways, to what ends, through what means, with what informative content, etc. This helps break the paralysis that crises can bring on. "Chicken Little syndrome".

Questions & Closing Thoughts

How do you find out what your Target Audience know and believe?

You've got to *ask them*. If you could afford it, Formal Research is the best way. Make everything measurable: "Here's what is, and here's what I want them to be." Donor audits; Donor surveys; Focus Groups.

If you can't afford research, do organized, unofficial stuff to seek response: MBWA with volunteers, board, staff, donors, people you know who are not yet involved in any way. Survey in your newsletter. Advertise in paper or on Cable TV, or however, for volunteers to participate in your focus groups. Learn, then establish new benchmarks.

How do you measure the extent to which your C/PR Program is achieving its objectives?

If you can't afford research, then agree internally on what you're trying to accomplish and *can* afford to measure without incurring expense (eg. "Increase the number of appearances of our organization's name in each of xyz media within the next twelve months."). Plus, repeat as above.

Write Communications Objectives (i.e. Public Education directed at Changing people's views on a particular issue) into your Mission Statement/Strategic Plan as one of the organization's core objectives, then you can budget these under 'Program', which is where you want them to be.

Whether or not you have a Communications Plan, you will have C/PR. You'll be communicating to your donors. Even if you don't talk to them at all, you're telling them a lot about how much you value them, or not, and about your organization.

The Constituency Relations Matrix gives you a means to craft messages to create an environment in which your fundraising can work more effectively because you are generating thoughtful information which conveys (relatively: you cannot control every aspect of any process, and there will be surprises) the messages you want, to influence the response of the audiences you have targeted, toward causes and initiatives you have chosen to give priority among your activities.

Keep the concept of Brand Identification in mind. What do people think of first when they hear the name of your organization? Also, when they think of an issue category, do you 'own' that category in their minds?

Enclosures

Method of Solicitation Responded to
Most Frequently
(not including religious donations)

Method	Frequency	Amount Donated
Person at Door	34%	$ 43.
Place of Work	15%	$ 53.
Piece of Mail	14%	$ 57.
Friend or Neighbour	11%	$ 43.
Collection Box	10%	$ 31.
Radio/Television	10%	$ 36.
Telephone	4%	$ 41.
Person in Street	1%	$ 34.

From *Canada Gives*
The Canadian Centre for Philanthropy

Direct Mail Procedure

1. Confirm/Update mailing roster
2. Draft letters(personalize) pledge cards and return envelopes
3. Personalized letter from Chair where possible
4. Chair's signature can be scanned into the letter so he/she doesn't have to sign each one.
5. Prepare, mail out(letter; pledge card; return envelope; mailing labels.)
6. Track gifts
7. Thank you's and receipts to gifts received
8. Follow-up letters

PHILOSOPHY OF SERVICE AND RESPECT FOR DONORS

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 in Canada. To assure that philanthropy merits the respect and trust of the general public, and that donors can have full confidence in the not-for-profit organizations and causes they are asked to support, we believe that all donors have the following rights:

1. **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.**

2. **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 stewardship responsibilities.**

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

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

5. **To receive appropriate acknowledgement and recognition.**

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

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

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

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

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