

Filling Your Toolbox—Strategies and Tools for Fundraising

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There are many ways to ask—by letter, via the Internet, by phone, by mass mailing, via a proposal, in person, and at events. Which strategy or tool you choose depends on many factors—for example:

- What expertise you have.
- How many people you have on your team.
- The characteristics of your donors and their preferences for being asked.
- How much you can outsource to consultants and others who can serve as temporary help.
- What is appropriate for the size of gift you request.

Before you even determine which strategies are most appropriate for your fundraising program, first consider the tools available, and then decide which ones work best for you.

Events

Events are particularly suitable for a variety of reasons. If you want to honor a donor or a group, wish to showcase your program, want to reach large numbers of people, have the opportunity to bring together donors as well as both employees and recipients of your organization's assistance, celebrate someone's achievements or a special day, and just have an enjoyable time, an event may be appropriate as a fundraising tool. It's important to remember, however, that events take much time and expend human and financial resources. Often they aren't the best money-makers because of these expenditures. Therefore it's best to have several purposes or goals in mind when planning an event.

Many types of events are possible, ranging from dinners to walks. The important thing to remember is what is most appropriate for your organization and the intended audience. Some events can be carried out with minimal work and expense, while others take months of preparation.

Whenever you have an event, be sure to have some method of collecting names and contact information so some follow-up is possible, and also that future fundraising contact can be possible.

Mail

The use of mail ranges from mass mailing to several hundred or thousand people, to letters sent to segmented groups on your mailing list, to individual or small group letters that are highly personalized. This is still one of the best ways to reach large numbers of prospects who may become donors, and an excellent tool for requesting repeat or upgraded gifts.

The more personalized the letters, the better the return. With computer capability now available around the world, programs can be designed that will personalize the letters (e.g., the most appropriate greeting and use of name for each prospect, such as Mr. and Mrs. versus first name use). Caution should be taken that the letters aren't too long, have content that applies both to the heart and the intellect, is specific about what is needed and requested, and captures the interest of the reader because it is well written and is readable.

As the requests become more personalized, the letters also are shaped according to the prospect's or donor's personality. Remember that one-size-fits-all isn't as effective as personalizing at all levels. If the recipients are a large group, then at least something should be known about their preferences, their interests, the amount of money they could give. The more that is known about the prospects, the better the letter can be written to achieve the best results.

Of course, a very personalized letter is suitable to request an upgrade of a repeat gift, to thank the donor for a visit that just took place, request an appointment, or just keep a donor informed.

Regulations for both mailing and phoning (next section) can vary from country to country, so it's important to check on any restrictions that might exist in these communications.

Phone

As in the use of mail, use of the phone varies according to the technological capabilities of a country, region, city, or area. In some countries cell phones are very common, and these are used increasingly because land lines are often no longer part of a person's communication means.

A common use of mass phoning is the "phonathon." This involves several phones in one room, trained callers, a script, materials for recording the prospect's information and for record-keeping, follow-up, and a conducive site for a group to work. The phonathon is an excellent way to make mass requests more personal, and allows for conversation and discussion, including answering questions and addressing concerns. It isn't a technique that can be used frequently or with very large groups because of the manpower and costs involved, but certainly ranks with one of the strategies that should be reserved for ongoing donors, requests to upgrade gifts, and donors who prefer to not be contacted personally.

The phone, of course, can be used to make personal appointments and also for follow-up after a personal visit, as well as a means of keeping in touch with donors.

Variations on use of the phone continue to increase as technology advances. Some organizations are now sending text messages that are funding appeals. The wise fundraiser will keep track of what happens with technology in his or her country, and will match advances in technological use to preferences and practices of donors and prospects.

The Internet

A good Web site is highly important in most countries and regions. Through this means, donors can learn of the organization on their own time and in their own preferred way of researching an organization and cause. Web sites should also make it possible for donors to give easily.

The Internet also makes possible other fundraising strategies. In the U.S. there are Web sites that serve as links to specific causes, and potential funders seek causes that interest them, then visit the specific Web sites. A Web site can provide various pieces of information and involvement. E-mail, another use of the Internet, is increasingly becoming popular as a means of informing prospects and donors about the cause and organization, and some are even finding success in requesting donations through e-mail.

Without a doubt, the many uses of the Internet should be part of a fundraising program's strategies, and continual changes make this tool an exceptional one, full of opportunities, as well as a challenging tool because of the knowledge and investment of time and money needed to use it wisely and effectively.

The Face-to-face Request

A personal visit by the right people matched with the prospect or donor is by far the most effective method of asking for a donation. Most people believe this is what fundraising really is and fear this method for a variety of reasons. However, if the askers are well prepared, committed to the cause, and have made donations themselves, often the fear is reduced or eliminated because then it becomes a conversation with the prospect or donor and is focused on mutual interests.

Naturally, there is a limit to how many personal calls a fundraiser can make, so a team is necessary. This can consist of volunteers, other staff, and in some cases, recipients of the funding. Preparation is key, which includes knowledge of the prospect and donor, details about the cause, information on why the prospect might be interested and might give, what mutual benefits can be promised, and what outcomes can be expected if the donor gives.

Usually it's best to go in pairs—someone from the organization and someone who knows the prospect or donor or is in some way linked to that person. The one who knows the prospect best should be the one to make the appointment. Never have a secretary make the appointment—the best fundraisers handle these relationships personally (of course, always consider exceptions depending on cultural elements).

When on the call, remember to have an introductory section to your visit during which you establish rapport and subtly remind the prospect why you're there. You might make reference to previous events or visits, or bring greetings from some personality important to the prospect and the cause, or a reference to common interests. This part is the shortest part of the visit, although of course it depends on how well you know the prospect and what type of personality he or she is.

Next, you move into a discussion of the project, giving details, answering and asking questions in such a way that you ensure this will be a conversation and not just a monologue, and, in general, sharing the aspects of the project for which you are raising funds.

Then you summarize, focusing once more on the features of the project and the mutual benefits, and again ask if there are questions—and then wait an appropriate amount of time to make sure the prospect has a chance to think and focus on what you're saying.

Finally, you make the actual request, stating the appropriate amount you believe the person could give (which is determined through appropriate prospect research and knowledge of the prospect).

Although the length and type of visit are sometimes dictated by culture, be careful to make this a conversation and not a one-sided visit, don't stay too long, focus, and try to adapt to the personality and communication preferences of the prospect.

Additional Strategies

Sales of items can be an effective means for receiving funds for your organization, as can be services provided, such as consulting and training. These and other such non-philanthropic methods must be appropriate to the potential donors and adhere to tax and other country laws. Possibilities are many, and we encourage you to search for these and also talk with other fundraisers.

Other strategies may work in some countries and not others, such as door-to-door solicitation or street solicitation, but the ones previously described are the most time-tested and have the most information available on best practices.

The selection and use of your fundraising tools is the most practical part of fundraising, but it very much depends on what you have already done in terms of developing a case and finding possible donors. This is the step where you match your potential donors with the right way in which to make a case.