Fundraising for Organizations with Big Ideas and Small Budgets
With Kim Klein

Created for the MN Council of Nonprofits
Evaluation of FR Program

Overall:
The same number of people, working the same amount of time, should raise more money every year
Check in frequently

What is going well?
Where are you disappointed?
Are your expectations realistic?
Are you building a fundraising culture?

What does your data show?
- Conversion rate?
- Retention Rate?
- Lapsed Capture?

www.kleinandroth.com
Giving is changing

- Gifts can start at any size
- Donors will be episodic
- Fewer regular annual donors
- Many people bypassing nonprofits altogether
- Competition with disasters and political campaigns
What is the “background noise”? 
Focus on People Who Give

- **Most people**: 68% of adults give away $$
- Give to 5-10 organizations each year
- Equal numbers of men and women.
- #1 reason people make a donation: someone asked them.
- #1 reason people don’t give: they say they were not asked.
Focus on Building Relationships

Invite everyone to a simple action: petition, join the e-mail list, like us on FB, re-tweet, etc. Build your list.

Invite the first gift from your list. (On-line appeal describing a piece of work)

Invite deeper engagement

Invite the donor to give thoughtfully: (personal calls, visits, personal asking)

Invite the donor to engage over and over: donations, petitions, surveys, showing up somewhere
The Importance of Appreciation

“Almost 5 out of 10 donors stop giving or give less because they feel, in part, that their gift is unappreciated” Penelope Burke

What forms can appreciation take at your organization?
Thank you Notes

Sent promptly
Personalized
Content changes every two months
Remember:
The thank you note is the one thing donors will read—don’t waste that opportunity

www.kleinandroth.com
Create Different Ways to Help:

Some people:

- will ask for money and some won’t
- love events, and some don’t
- enjoy working alone, others in teams
- prefer approaching strangers
- prefer working with institutions

Who are you?
Is your team balanced amongst all the styles?
Build a Team of Askers

Some people must be willing to ask in person, do follow up e-mails and make phone calls!
Make a Plan

SET
GOALS
### A Simple Chart

**Goal:** $50,000

<table>
<thead>
<tr>
<th># of gifts</th>
<th>size</th>
<th># of prospects*</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>$5000</td>
<td>8</td>
</tr>
<tr>
<td>4</td>
<td>$2500</td>
<td>16</td>
</tr>
<tr>
<td>10</td>
<td>$1000</td>
<td>30</td>
</tr>
<tr>
<td>20</td>
<td>$500</td>
<td>40</td>
</tr>
<tr>
<td>40</td>
<td>$250</td>
<td>80</td>
</tr>
</tbody>
</table>

76 gifts \( \times \) 2 = 152 prospects

*You will need 2 times the number of prospects as the number of gifts*
Identify Triple A Prospects

**Access:**
Prospect knows you or someone who knows you.

**Ability:**
Gives away money

**Affinity:**
Cares about this cause or something similar
Affinity for the Cause is Critical

Sounds great. I think it is fantastic.

I want to be part of this. Here is my gift.

I wish you well

I will give money

www.kleinandroth.com
Approach Prospects Personally

Use a combination of cards, letter/e-mail, text or phone call, and face to face meetings

www.westmarinfund.org
Preparation

Have ready:

- Stories
- Statistics, including comparisons
- Philosophical points
- Responses to common objections and questions
- Budget and fundraising success so far
The Phone Call

Have ready:
- **Opening sentence**
- **Message for VM**

- **Most exciting thing about the project**
- **Where are you toward the goal?**
- **How much do you want?**
- **What happens now?**
Prepare Questions To Ask

How did you first hear about us?
How long have you lived here?
How is that donut shop that just opened?
What is most compelling about this issue to you?
Tell Your Own Story

I got involved in this because….

The most surprising thing to me about this issue is….

I loved meeting people who have been giving for a long time because….
Ask yourself, “Why Am I Talking?”
What is next for you?

What are the small changes you could make that would lead to big changes in your fundraising program?
Kim Klein is the author of five books, including the classic text, *Fundraising for Social Change*, recently released in a SEVENTH edition. She also wrote *Reliable Fundraising in Unreliable Times*, which won the McAdam Book Award in 2010. She has provided training and consultation in all 50 United States, five Canadian provinces and 21 other countries. She is a lecturer at the School of Social Welfare at the University of California, Berkeley, and has served as guest faculty at the Haas School of Business at UC Berkeley and Concordia University in Montreal. She divides her time between Berkeley and Pt Reyes Station, CA.