

# FUNDRAISING 101 - THE LEAGUE WAY



League of Women Voters of the United States  
Fundraising Handbook  
LWVUS Convention 2004  
Revised 2013

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# Foreword

Judy Davis, LWVUS Development Chair 2006 - 2012

The three levels of League live in symbiosis with each other. Each level is necessary for us to accomplish our mission. To be successful, we need to be active at every level of government. We need the shared insight that comes from working at the various levels of government. We need the broad perspective that comes from having local Leagues in so many communities in every state of our nation. Our true grassroots presence gives us a clearer picture of the critical issues that need to be confronted by our elected officials and their constituents. Our trusted nonpartisan voice makes a difference, and we must make sure it is not stilled.

We understand that we need to strengthen our leadership and membership to remain viable. With proven programs now in place to build capacity in those areas, we are seeing success from those efforts. Undergirding all of these efforts is something we never discuss in a comprehensive way—the financial health of the League as a whole.

The League needs to be financially healthy at every level to be truly successful. Money allows the League to undertake a project, a study, or an advocacy campaign at a critical time. At the national level, every new fiscal year brings with it the knowledge that we must raise around 77% of our operating expenses. The portion of membership dues received by LWVUS pays for about 23% of our operating expenses, and we raise the rest from various sources.

Membership dues give us a base from which we can build to leverage more dollars. For example: when we go to philanthropic foundations with a proposal, we get a better reception because they already know that we have active members across the country working in their communities and with state legislatures every day. They also know that these members contribute to the financial health of the League as a whole with their membership dues. Foundations want to give money to organizations that are stable and can achieve measurable results in whatever endeavor they are funding. They give money to organizations whose members are committed enough to support its work actively and financially.

As a result of the good relationships formed by the LWV's Executive Director and staff with quite a few foundations over the last decade, we have received millions of dollars in grants to further our mission. Much of this money goes right back to state and local Leagues to fund their critical work. This is one example of leveraging your membership dollars. We have turned them into more money that comes back to you as hard dollars for work you want to do.

Another example is the Membership Recruitment Initiative, now known as the Membership and Leadership Development program. At the national level we took money that was raised and invested it in the health and strength of local and state Leagues. We continue to raise money for that critical effort. And the stronger you become at the state and local level, the more visible you become, the easier it becomes to raise money—for all of us—at every level. Why? Because people give money to an

organization that they believe is doing important work. If you are not visible, you will not be perceived to be doing important work. And you really do need some money to achieve a high level of success. Again, we are building at every level, and we are leveraging that strength and visibility into more capacity and better financial health.

At the national level, we are leveraging the dollars you send us to raise more money to invest in the health of your Leagues. Now consider how you need to do the same thing at your level. To be truly healthy, our organization needs to be financially strong at every level, which means raising money at every level. Some Leagues are doing a good job of raising money, but many more are not. They are frustrated and suffering because of it. They resent having to send their PMP to state and national. Yet, because their dues are too low or because they do minimal or no fundraising at all, they are left with no money to do anything in their community without a struggle. How can we change this outlook?

Let's consider for a moment the good things that come from fundraising besides the money. Yes, there are other benefits. LWVUS sends out millions of mail pieces every year in our direct marketing campaigns. These mail pieces tell people about the critical issues we are confronting—essentially, the story of what our Leagues are working on across the country—and the difference we are making. In this way, LWVUS is raising up your work at the local level, giving it national visibility, promoting what you are doing into a bigger arena, and making your voice stronger and your work more meaningful.

LWVUS can do this kind of direct marketing because of its excellent professional staff who ensure that we get a good return for our investment. It is more difficult to do at your level, but there are other things you can do. You can begin to build a list of donors and prospects to whom you can tell the story of what your League is doing for your community/state. Think of fundraising as another avenue of visibility, another opportunity to talk about what the League means to your community and why it is valuable.

Finally, don't think that you must do everything for free. People tend to value more the things for which they have to pay something. Charge a fee for supplying a League moderator for a forum; charge a fee for running a homeowners association election or a student government election. Have a regular Hot Topics luncheon and charge a fee or increase the price of the lunch. In other words, look for ways to make everything you do pay for itself with a little extra left over. Value the work you do for the community and they will value it more as well. And for goodness sake, please set your dues to cover the per member payments with enough left over to leverage into more visibility and more dollars.

# I. The facts on fundraising

Fundraising is not brain surgery. At the heart of all fundraising is relationship building. It may sound silly, but the actual work of fundraising is less about money and more about creating friends...think of it as “friendraising!”

There are a lot of misconceptions about fundraising. The first step is to purge all of the stigmas of fundraising, especially fundraising for the League:

- ⊗ Never apologize for asking; you are not asking for yourself. You are asking for a trusted, valued civic organization that focuses on Making Democracy Work.
- ⊗ Do not think people will give out of the goodness of their heart. When was the last time you gave away something when you were not asked?
- ⊗ Do not adapt a martyr syndrome; think of how nice it would be to plan and do the programs you want to do without worrying about funds.
- ⊗ Fundraising is not the sole responsibility of the Development Chair; every Board Member should have a role in raising money.

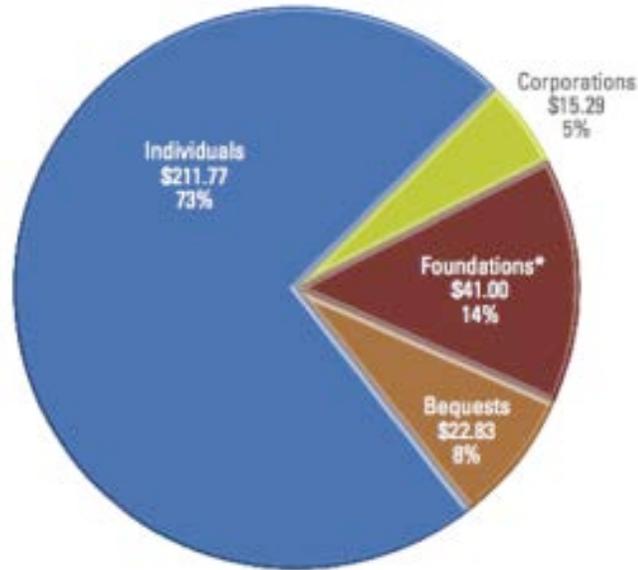
Now that we have left these misconceptions behind, it is time to educate ourselves on the facts.

Did you know?

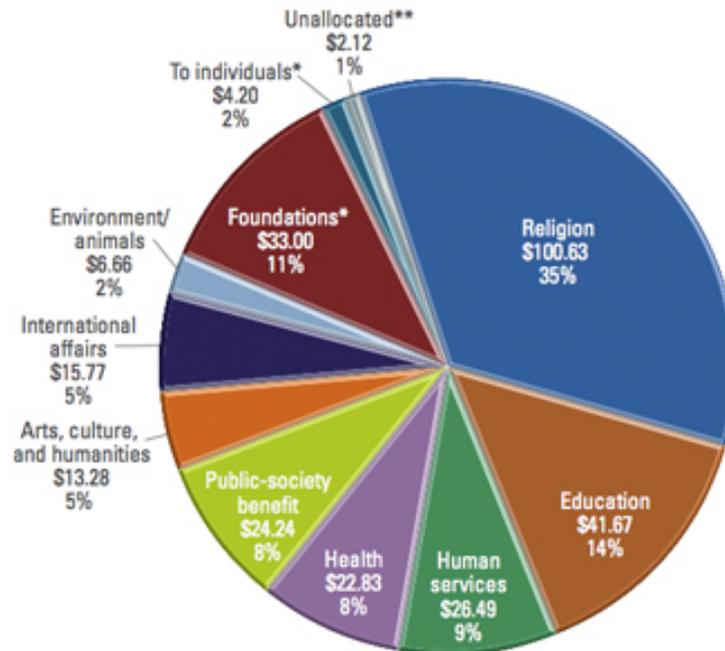
- That individuals contributed \$234.6 billion to charities in 2010? Individual contributions account for 81% of all giving! When giving through family foundations is counted with individuals and bequests, that share goes up to 88%.
- That corporations and foundations only make up a small part of annual contributions...about 19% of total gifts?
- That the League is an organization that cuts across many interests and issues, and that we have the opportunity to draw upon donors who are interested in international affairs, the environment, public society benefit, and human services?

## Giving USA: The Numbers

2010 contributions: \$290.89 billion by source of contributions  
(in billions of dollars – all figures are rounded)



2010 contributions: \$290.89 billion by type of recipient organization  
(in billions of dollars – all figures are rounded)



Includes rounding to get to 100%

\* Estimate developed jointly by the Foundation Center and Giving USA.

\*\* See definition in "Key Findings" section.

Studies have helped identify why people give:

- 60% give to help; they believe in the cause.
- 23% give for religious reasons or from a desire to extend their causes beyond their own lifetime.
- 9% give because they were asked.
- Only 2% give for the tax benefit, although the tax benefit may affect the amount given.

People also give because they know and respect the leadership of the organization (board and staff) and its financial management.

The facts speak clearly; we need to focus our energy on individuals...friends, spouses, community members, League members, and colleagues. We need to begin by thinking about those who have a common interest in the League, people we already know, and people whom we may have to research. We have to decide what to talk to these people about, how to contact them, how to ask them. There is so much work to do...WHERE DO I BEGIN?

## II. Where to begin

It is a daunting task; most Development Chairs are responsible for a lot of money. Your Board depends on you to lead and develop a plan. If you are not a seasoned fundraiser, this may seem like a lot of work. This booklet endeavors to break it down and give you the tools to think through what you need to do.

But before we jump into the ways to raise money, we need to think about WHY we need money. This is called *identifying the need*, and it is the fundamental step in fundraising. Here are some possible reasons you may need money, and this list is just to get you thinking.

- \$ We need to do a study.
- \$ We need to hold a community dialogue or debate.
- \$ We need to publish and distribute election information in the community.
- \$ We need to educate the community on a specific subject.

What do you, specifically, need to raise money for?



### Easy Brainstorming Activity

This has probably happened hundreds of times: You are at a Board meeting and someone says “If only we had the money to do this!” That Board Member has just *identified a need*. Try working with a few Board Members to come up with a list of activities that you need money for, and then prioritize that list.

Now that you have developed a list of projects and activities that need funding, you need to answer a big question. Why should anyone fund your project, and what makes it unique? Why is the League the best organization for this project? Why should I attend that event?

You need to *develop a case for support*. This sounds hard, but you probably have all the information already available to *develop a case for support*. That information is probably on your website, in your membership materials, in your newsletter. It really comprises the basis of why your League exists. Let’s think through these questions:

- Why should someone support the League?
- What is the community need? For example, your League wants to do a study, hold community meetings, and publish your findings. Why is the study needed? When does your community need it? How will it benefit the community?

- Why is the League the best organization to fill this need? Provide history, projects you have done that are similar.
- What is your plan to address the need? Be specific and develop a timeline, activities, budget.

The *case for support* is sometimes hard to pinpoint, and you may need to resort to a Socratic method of, “Why, why, why, why?” But do not get frustrated. The work of the League is important, and members of your community acknowledge that. Speak to the best parts of your local organization and do not get bogged down in the details. Let’s look at a case study for further instruction.



## Case Study:

The LWV of Moneyland wants to produce a community dialogue on health care reform. This dialogue will be like the one held last year to inform the community about election reform issues. In order to hold this year’s dialogue, they need to secure the location, date, and speakers. They need to plan for costs associated with printing and mailing notices to the community, speaker honorarium and travel for the speaker. In addition, they are hoping to distribute a quick fact sheet to the community on the comprehensive health care reform legislation that was passed by Congress; so there will be a slight printing and mailing cost. The total estimated cost for the event is \$750. With a *fundraising goal* for the event of \$1,500, the League hopes to use the event to raise awareness about other League activities, membership and needs.

*What is the need?* The LWV of Moneyland needs funds to cover the cost of the community dialogue, League overhead, and production of related materials on civil liberties.

*What is the case for support?* The LWV conducted a very successful community dialogue on election reform in 2011. The League is the best organization, given its contacts, knowledge of nonpartisan research and the trusted reputation to hold a dialogue on the controversial subject of health care reform, and the League has held many successful dialogues in the past. The community needs to have this dialogue soon, as the topic is very timely and contentious.

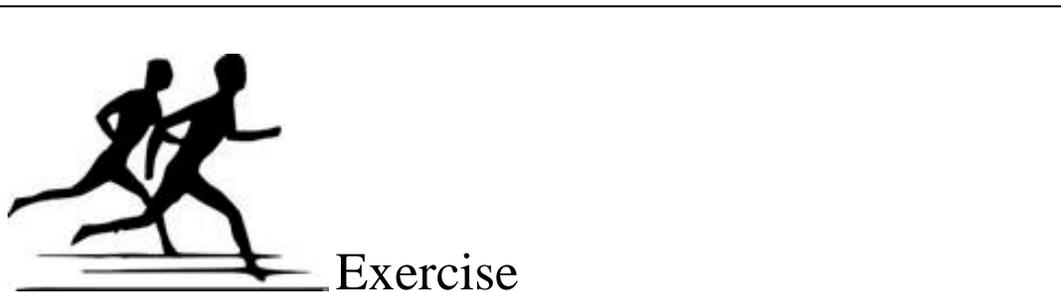
You will notice that the case for support did not contain language about overhead costs or any details about the League’s other good work. One of the main elements of a case for support is to keep it focused—be specific about what you need the funds for. Make your case targeted, but be sure to include overhead costs (staff, office, supplies, etc.) in the project budget.

So, you have *identified the need*, you have *developed your case for support*, but you still have one last thing to do before you begin asking people for money. You need to *define your donor audience*. Who are you going to ask for money? This might be the easiest part of where to begin, and chances are you already have lists ready. There are two good ways to organize your donor audience. The first is to make a simple list, and here are some people that you might want to include on your list:

- Your League members
- Your League donors
- Your personal friends
- Friends from your church
- Your co-workers
- Your neighbors
- Your vendors
- Your community partners
- Your family
- Past League speakers and guests
- Your family members' co-workers

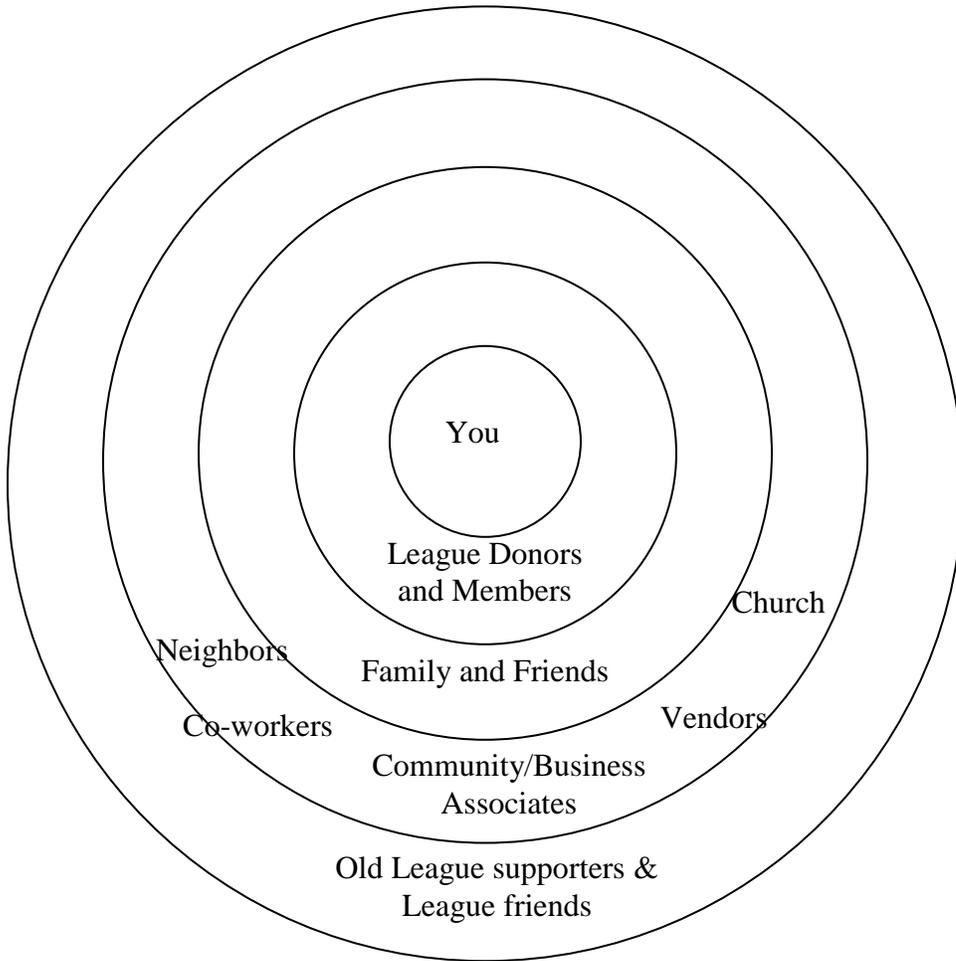
Sustainable fundraising consists of asking the most likely prospects to give. Within the U.S. population, 75.1% make donations. Of that number, 36.1% give and don't volunteer while 63.9% give and volunteer. The average person gives to 11-14 causes.

Another useful exercise is to do donor circles.



Review the chart below. Then, using the empty circles chart in the appendix, think about who would be in your circles. What about the circles of your Board Members? Your spouse or partner? Pull out your rolodex and e-mails and see who you come up with, and place them in the circle.

Remember, you are the middle of the circle, and those in the circle closest to you are your best prospects. The further they move out in the circle, the less likely they will be a contributor.



## Developing a Plan and a Calendar for Fundraising

All right, we have *identified the need, developed a case for support, defined our donor audience*, and now we need to *articulate our plan*.

This may seem elementary, but it is critical for a Development Chair to determine a plan. Most organizations work in a 12 month timetable, and if you have identified your needs correctly, you know that you will need funds to do projects, maintain the organization, service your members, etc. etc. How are you going to keep track of that?

There is no one way to do a fundraising plan. What all fundraising plans have in common is a timetable, and that is where you should begin. Use a calendar, come up with an outline or simply put together a list. A month to month schedule of tasks is a helpful tool that will keep you on track. There is a sample timetable plan for the LWV of Moneyland in the Appendix, but let's go through some questions to help you organize your thinking:

- When are your major events?
- When is the best time to do an annual mailing appeal?
- Do you have a phon-a-thon scheduled?
- When are your local elections?
- When are the solicitations drives/major events of other local organizations so you can avoid overlap?
- What is the best season/month/time of year for fundraising? (Not holidays or summers...)
- When does your League have the most activities/events/work happening?

Some new fundraisers want to skip the plan and just jump into asking. This is a novice mistake. Plans keep you on track, they allow you to measure your goals, they require you to think about your progress, and they legitimize your strategies. Plans make you a better leader, and when you develop a fundraising committee, a plan gives those committee members a point of departure.

Think of it another way. What do you gain from skipping the planning process?

### III. Getting the support you need from your Board

Does this scenario sound familiar? You have just been appointed Development Chair, you don't have any documents from the previous years, the list of donors is somewhere on someone's computer, and during a Board meeting someone turns to you and says, "So, what is the plan for money this year?" What did you get yourself into?

Let's step back from the scenario for a moment and talk about the involvement of the Board and how to address the abandoned Development Chair syndrome. This should give you some good ideas on how to approach the problem on a systemic level.

#### **What is the genesis of the problem?**

The Nominating Committee needs to be aware of fundraising priorities. Expectations for Board members should be clearly stated to all who are considering being on the League Board, at any level. ALL must be told that fundraising is part of the job. See the appendix for a sample list of Board responsibilities for the LWV of Moneyland.

#### **What is the role of the President?**

The President is the KEY PERSON and must be willing to lead (in this as in any area.) The President sets the example for the entire organization.

When LWVUS surveyed local Leagues about their development activities, several Presidents said, "I couldn't find anyone to do fundraising; so we didn't do any."

**Raising money is not the responsibility of one person, or two, but the entire Board. It's up to the President to work with the Board to figure out how to do it.**

#### **I am a program person – not a fundraiser!**

Don't separate program people from fundraisers. Fundraisers must have a clear understanding of the project and believe in it in order to sell it to prospective funders. Program people should be an integral part of any development plan. No one could be better than the program chair to talk about why a program/project is so important. The program chair is the best person to discuss the steps needed to complete the work and what type of funding is needed.

#### **What are the two fundraising things the Board is responsibility for?**

Donate money to the League. Time is not money. Both types of support are important to the success of any organization. But volunteering your time is NOT the same as donating money. Being able to say "We have the financial support of 100% of our Board," sends an impressive and powerful message to those you ask for money. Also, it's much easier to ask others for money to support the League once YOU have given what you consider to be a substantial donation, no matter what the amount. This is called *peer to peer solicitation*, and it works very well. After all,

how can you ask others to support the League if you do not believe it is worth your own donation?

The other major responsibility for Board members is to fundraise for the League. Board members are the most active and involved. They can communicate their passion to peers, friends, business contacts, etc. Board members can SELL the League!

**But, “I’m no good at fundraising...”**

Ha! Everyone can help in some way. Here are some examples:

- ☺ Give names from your circle for a letter campaign.
- ☺ Participate in visits to corporations or foundations. Your passion for this project will help to sell them on funding the League.
- ☺ If you like to write, draft a letter. Or perhaps you would like to research proposal writing.
- ☺ Write personal notes on donor letters, or make “thank you” phone calls.
- ☺ Sell raffle tickets.
- ☺ Invite friends and colleagues to attend a League event.
- ☺ Plan and organize fundraising events. Do you like parties?
- ☺ What about event follow-up calls?

**“No, really, I’m not good at fundraising...”**

Okay, maybe you still have reluctant Board members. At this point, you have to remind them that they made a commitment to this organization to help fundraise and that is not negotiable. Peer pressure helps but be gentle. You do not want to alienate a good board member who may be really active in everything else, just not fundraising. Here are some more ideas on how to involve that person:

- ☺ Donor research – got the web? Can you look up contact information?
- ☺ Can you volunteer an evening to stuff envelopes?
- ☺ Can you volunteer your home to host a development committee meeting? What about providing a dinner to the development volunteers or helping to acknowledge donors at an event?
- ☺ What about data entry?
- ☺ Finally – maybe this Board member is not active on the committee. The last resort is: “Is there a task, an afternoon, something...that you can give to me to do the following...?” Be specific with your ask, and communicate that it is a one-shot request. It is very hard for people to say no when you make a specific request.

**D**o not be discouraged. There will always be a few Board members who refuse to fundraise. (That is the law of averages.) But you can still motivate your committee and Board members, and sometimes it is not the number of volunteers you have, but the quality. Be sure to acknowledge your quality volunteers and be generous in your gratitude and praise.

## A Quick Review...

Before we begin to master the different ways to raise money, let's do a quick review of what we have covered.

Why fundraise?

- Raise money to support vital program and events.
- Insure financial stability.
- Heighten public awareness.
- Expand circle of friends/supporters.
- Build stronger relationships with friends/supporters.

These questions are designed to get you thinking again:

Do you send requests for membership renewal on a regular, timely basis each year?

Does your League have a core group of members who attend all the meetings and commit a lot of time, while others sit on the sidelines? Do you ask the sideline people to financially support the League?

Do you ask friends and extended family to make a contribution, however modest, to support your League as a show of support for you and the organization to which you dedicate so much of your own time and commitment?

Do you ask business associates and contacts in the community to support with an annual gift of either cash or in-kind services?

Do you ask members of your Board to give? Even a small gift makes a difference and allows you to say, "We have 100% Board participation!"

Do you approach the major civic leaders, businesses, community oriented foundations in your areas for support of the League?

Do you collect the names, addresses, emails of everyone your League comes in contact with so that you can add them to your mailing list?

These questions should be no problem if you have *identified your need, developed your case for support, defined your donor audience, articulated a plan, and gotten the support of your Board*. Congratulations – you are ready to move on to mastering the techniques of fundraising!

## IV. Mastering the ways to raise money

What are the ways that you raise money? Do you do an annual mail appeal for contributions or send monthly membership dues expiration reminders with a request for an additional gift beyond the dues rate? Do you send a year-end appeal for donations? Do you mostly mail, call, or personally meet with your donors? Do you do a big annual event?

You only have so many channels to reach your donors: mail, phone, e-mail, newsletter, advertisement, personal visit, etc. What vehicles do you use to fundraise?



### Exercise

What vehicles do you currently use to fundraise? Come up with a list of the vehicles you use. Here's a list already started for you:

- Annual mailing for contributions
- Phon-a-thon
- Planned giving breakfast
- Events (annual dinner, debates, community dialogues...)
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

Fundraising programs should not rely on just one type of vehicle for giving or channels to reach your donors. Your donors should have multiple opportunities to give through many different types of channels and vehicles. Let's begin with the fundraising task that you are most familiar with...membership.

## A. Membership

Your League has been asking members for funds in the form of membership dues since its inception. You may think this is not fundraising, but the same rules apply. You are asking someone to give money to your League. You should apply fundraising methods when asking people to join, as well as when asking them to renew membership.

Here are some tips and ideas to solicit new members:

- ★ Take membership brochures with you...everywhere.
- ★ Give membership brochures to everyone who asks about the League; ask them to join.
- ★ If you meet someone and talk with them about the League, follow-up with a personal note and ask them to join the League. Include your brochure!
- ★ If you have a notice going out to the community, be sure to include a blurb on membership and ask that person to visit your web-site for more information and to find out how to join the League.



### Resource:

The LWVUS electronically publishes *The Leaders Update* each week. This is a publication for League leaders that provides all sorts of critical information about the League at all levels and access to training resources on a variety of topics useful to League leaders. If you are not getting your copy, call the LWVUS! You don't want to miss this important weekly bulletin!

All right, you have your members. But in 12 months their membership will expire; so what are you going to do to keep your members? How do you renew your membership? Attrition is a normal part of fundraising, and you can expect that there will be members who just do not connect with the League anymore. There is a lot you can do, however, to make sure that you keep your members. And through your renewal notices, you can encourage those who are able to either make a gift over and above their regular dues, or create different levels of membership such as Patron, Benefactor, etc, that include such a gift in the dues amount.

Let's return to our case study to examine how the LWV of Moneyland renews their members.



## Case Study:

The LWV of Moneyland recently noticed that its membership numbers were declining. A few members had sadly passed away, but there was a whole list of people who just never renewed! Why?

The Membership Chair evaluated those who did not renew and found that:

- Nearly  $\frac{1}{2}$  of those people had forgotten that they had lapsed on membership.
- Another  $\frac{1}{4}$  of the people never got their renewal letter.
- Another  $\frac{1}{4}$  of those people did not want to renew because their life changed. They went back to work, to school, or became involved with other organizations. A few even decided that they could not afford the membership anymore.

The Membership Chair immediately acted to resolve the membership renewal challenges. The changes made were:

- The Chair decided to ask people to renew BEFORE their member expiration date. For members who joined in January, the Chair sent a letter in November asking them to renew, stating that early renewal will ensure their staying on the member roster without interruption but not shorten the full 12 months of their current membership. Said another way, start renewing at the 10<sup>th</sup> month of membership. (Starting the renewal effort two months before the membership expires also works in Leagues that have one month each year for all members to renew.)
- The Chair asked the member more than once—maybe 2 or 3 times—to renew. Sometimes members do not get the first notice, and they need more reminders.
- For those who felt that they lost interest in the organization, the Chair asked them to rejoin just to provide financial support.
- For those members who said they could not “afford” membership, the Chair immediately contacted the President to negotiate a reduced membership for active members with financial constraints.
- The Chair encouraged all members who were able to make a financial gift beyond the basic dues amount. Because the League had developed a multi-tiered membership dues program, members were given the option of renewing at a higher dollar amount to support the League’s work for the coming year.
- The Chair assigned a few Board Members to call those who did not respond after several attempts. In some cases, those lapsed members were ill or having personal problems. The Membership Chair found that these Board calls had a very high response rate. Those lapsed members appreciated the personal touch.
- The Chair tried different methods of reaching people, including e-mail, phone calls, reminders in the *Voter*, and personal letters.

- ☑ The Chair made sure to include a reply envelope in each mailed renewal attempt. The Chair wanted to make it easy on that member to send in a check.
- ☑ To address the fact that some lapsed members did not feel connected to the organization, the Chair made sure that every member received the *Voter*, invitations to events, and other notices that provide an opportunity to connect with the League and its activities.

The case study shows us how the Membership Chair addressed the problem of declining membership and membership renewals. It is important to keep your members, not only for the membership income, but also because they share your passion for the organization. Your members are the people who most value the League and its work. Your members can also prove to be another source of income, above and beyond their membership amount. The strategies that you use to renew your members are the same that you should use to renew your donors.

## B. Fundraising appeals

Do you make a separate request, either in person or by mail, of each member for an additional contribution of money? Do you have an appeals program for donors and members in your fundraising plan? For friends in your “circle?”

“Appeals” is a fundraising term for solicitations, generally by mail, for funds of any amount for any purpose. An appeal can be for general support or for a specific project or program. It should specify a suggested gift amount.

Think back to your circles...who are the people who are closest to the League? Those people should be your first interest when creating your list of people to approach for contributions. Current members and donors are the best prospects for a successful appeal. You might also send appeals to local businesses and other individuals familiar with the League.



### Remember...

It is easier to renew a member before his or her membership expires; so you should send membership reminders 2 months before expiration. You can state that early renewal will ensure the member stays on the member roster without interruption, but will not shorten the full 12 months of their current membership. The same is true for donors too! Do not let your donor go 12 months without an appeal. If you only send one appeal a year, start to re-solicit your donor at 10 months and send 1 to 2 follow up emails or letters to non-responders! Charitable giving is not a priority for most people. Letters can get lost and people are busy. Give them more than one chance to donate or join!

The timing of your appeals is important. Obviously, it is not in your League's interest to send out 2, 3, or 4 requests for money in one month. Your donors would become fatigued, and your efforts would be wasted. You may want to avoid mailing in the summer months when many people travel or too close to the year-end holidays when every organization is soliciting donations and mail can get lost in the crush of the season.

To make your mail effective, think about the major events and major dates that are important to your League. For example, the League's anniversary on February 14<sup>th</sup> presents a wonderful opportunity to send out an annual appeal for general support. Remind your members and donors about the League's history (briefly) and talk about the work that is ahead.

Or, what about a mail appeal in the early fall before elections? The League is well known for our work to provide election information, education on issues, and voter protection. Timing an appeal before an election is likely to produce good results.

Finally, many donors make year-end gifts. A mail appeal anytime after November 1 asking for an end-of-year gift is a great idea. Be certain to give your donor a deadline for their gift before December 31.

In summary, there are several times during the year when your League can send out a mail appeal, hold a phone-a-thon, or make personal visits. You can also choose different times of the year to contact just members, or just previous donors, or previous donors and prospects. Three to four appeals in a year is considered optimum.



## Exercise

How can you creatively “appeal” to your donors? What are the opportunities that you have to mail a letter or call your donors for a special contribution?

1. February 14 – League anniversary
2. October/November – Election time
3. End-of-year letter
4. \_\_\_\_\_
5. \_\_\_\_\_
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Whether you are sending 100 or 100,000 letters, there are some common rules for mail appeals:

Rule 1: Write your mail appeal as if you were talking to one person. The letter should be warm and personal. Do not write your appeal by committee.

Rule 2: In the first paragraph, appeal to the donor with a story that will engage him or her emotionally. Use a story about someone or some current event as the means to engage the donor and to illustrate the value of what the League does. The story should motivate the donor because few will donate just because you ask. Remember your *case for support*.

Rule 3: Describe why you need money. This is the part where you *articulate your need*. Appeal to the donor's mind; describe specifically how the contribution will be used.

Rule 4: Indicate to your reader that this effort has widespread community interest and your organization is ready for action.

Rule 5: Talk about the positive benefits, the "reward" of making this gift. Appeal to the donor's values and interests. (For example, "Your support will enable us to educate more voters than ever...")

Rule 6: Think about why people give: good for the community, a personal sense of duty and service, an investment in the future, a personal sense of social responsibility, payback for service received, family tradition. Use language that creates a framework of values that resonate with the donor. Themes that create images of caring, fairness, loyalty, respect, liberty, and valuing one another are good.

Rule 7: Create urgency. Make your reader feel like it is imperative that they return their gift today!

Rule 8: Ask for a contribution on the first page of your letter and repeat the request. Take every opportunity to repeat the need for a contribution.

Rule 9: Keep your paragraphs short! Use active voice, not passive voice. And be sure to highlight by underlining or **bolding** key pieces of information to make the letter scannable.

Rule 10: Use a 12-point serif font (not sans serif) and leave enough white space in the margins so your letter is very easy to read. Create a ragged right margin (not justified).

Rule 11: Ask for a donation within in a specific range (eg: "Your gift of \$250, \$100, or \$75 will be especially helpful."). Give an example of what gifts of varying amounts will do.

Rule 12: Ask the donor to consider making an increased gift or multi-year pledge if the donor has been giving for several years.

Rule 13: Use a P.S. that reiterates your request for support. Studies show that the postscript is the most widely read part of letters.

Rule 14: Though it may seem counter-intuitive, studies show that longer letters generally outperform shorter ones. Consider a two-page or even three-page letter, and print the second page on the back rather than using a new sheet of paper. Remember that this letter is your opportunity to make the case for a donation; so don't shortchange yourself by forcing the letter to fit on one page.

Rule 15: Differentiate your envelope from junk mail by using a "live" stamp to mail the letter, rather than a postage meter or a bulk rate indic. A bulk-rate, nonprofit stamp is acceptable for your membership if you have 200 or more letters to mail. Use a first class stamp when mailing to prospects and non-member donors.

Rule 16: Always, always include a reply envelope and a response card. Don't make your donor fumble for a personal envelope.

Located in the appendix is a sample outline for your solicitation letter. An effective letter is passionate, identifies your League's needs, and has a solid case for support. An effective letter is neither whiny nor pleads for a donor to rescue the organization. No donor wants to read about money problems. They want to read about the work that you have to do, the challenges ahead for that work, and the ultimate goals and pay-offs from your work. Highlight your plans and accomplishments, not your worries. Remember your basics, and remember these rules for appeals!

An integrated approach to fundraising uses email or a phone call along with the mailed appeal. You can email or phone those on your list that you haven't heard from after a couple of weeks to remind them that their donation is very important and part of Making Democracy Work. Or you can email them or phone them in advance of mailing the letter to alert them to the forthcoming appeal.

## C. Fundraising Events

The League is well known for all kinds of events: convention, banquets, debates, lectures, home tours, house parties, and more. But throwing a party or staging a debate is different from fundraising in one critical way: when you host *a fundraising event*, you begin your plans with money in mind. Period.

Let's acknowledge all the negative things about fundraising events:

- ⊗ They take a lot of time.
- ⊗ They take a lot of money.
- ⊗ They take a lot of energy.
- ⊗ They take a lot of volunteers.
- ⊗ They take a lot of planning.

What is positive about having a fundraising event:

- ☺ It can be an opportunity to raise a lot of money.
- ☺ It can be an opportunity to showcase your League to a wide audience.
- ☺ It can be an opportunity to create some exposure and “buzz” for your League.
- ☺ It can be an opportunity to galvanize your volunteers for a big project.
- ☺ It can be an opportunity to create a legacy event for your League.

Fundraising events are no doubt a double-edged sword. Here are some key issues to address before you begin thinking about how your League can best have a fundraising event:

- What is the history of events in your League? Have you done them before?
- How large is your League?
- What other local organizations host events? Have you attended? Would you call them successful?
- Who is your potential audience?
- How much money do you have in your budget and how much money do you aim to raise?
- Is an event the most effective way to reach your fundraising goal?
- How would you describe your volunteer base? Tired, energetic, willing but not able, fatigued?
- What other activities are on your schedule for this year?

The questions above are basically “feasibility” questions. It is very important to fully investigate the feasibility of the event before proceeding. You may find that you have a large League, but no volunteers, which would lead you to decide that it is more feasible to do a house party type event than a huge gala. When you do a feasibility study, you may learn that many other worthy organizations in the area have had a miserable time staging events. That may cause you to do further investigation and develop a different type of event than others have staged. When you thoroughly explore the feasibility of an event, your planning process will be much easier.

If you have done a thorough feasibility study regarding an event, planning a fundraising event becomes easier than you might think. Once you have fully examined the feasibility of an event, you will find that a lot of timing and volunteer questions are pre-resolved. Let’s return to our case study to learn about the LWV of Moneyland’s event program. Also, in the appendix, there is a sample timeline for events for the LWV of Moneyland.



## Case Study

The Development Chair for the LWV of Moneyland wanted to include an event in the fundraising plan. In the community, there are a lot of big dinners and galas. The Development Chair, after a long period of study, determined that the big gala events that the LWV of Moneyland has done in the past are not feasible at this point. The LWV of Moneyland does not have the resources to rent out a banquet hall. The big name guests that they invited in the past, while interesting, never drew the type of crowd that they hoped. The fundraising committee never really fulfilled expectations or met the goal for ticket sales. The volunteers were never really appropriately acknowledged or used efficiently, and they are tired. A new idea is needed.

The Development Chair decides to pursue a smaller event with a more limited guest list. She begins to brainstorm with the Development Committee and, using their donor circles, they determine to work their contacts to reach out to a local prominent author, League member, newspaper reporter or editorial page editor, respected college professor or former elected official. The Chair decides that a house party is the best way to go for this type of speaker, and the Chair gets started on a fundraising goal and a schedule. Meanwhile, the Development Committee begins to further think about other prominent guests they could invite to the event, including local politicians, community leaders, and prominent women.

The Chair's first task is to think about a fundraising goal. This is not a number etched in stone but a good ballpark figure. The Development Chair hopes to take in \$4,500, with another \$1,000 in donated in-kind gifts.

The Chair's next step is to identify a home, hopefully one with a gracious host who will contribute catering costs. The Chair thinks through the people included in the circle exercise and settles on a short list of League members who have the means to host this type of event. One by one, the Chair works through the list until someone agrees to host the event and provide in-kind catering.

Given the location, the hostess, and the special guests, the event took on an exclusive feel and the Development Chair was able to set a tiered pricing structure in which more expensive tickets conferred greater benefits to donors. Luckily, the author agreed to give the League autographed copies of her book, thereby creating an in-kind gift to those who bought more expensive tickets.

House parties, like the kind for the LWV of Moneyland, are only one type of fundraising event. Certainly, if there are more resources, volunteers, and time, your League can host all types of events!



## Exercise

What type of events does your League have? What about the events of other groups in your community? Create a list, thinking outside of the box, of the types of fundraising events you could do for your League.

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- \_\_\_\_\_
- \_\_\_\_\_
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- \_\_\_\_\_

It deserves restating: be certain to do a feasibility study for your event first, and set your fundraising goal as the first step in your planning process. There are other event rules that deserve special attention.

1. Successful events take time to plan and carry out. If you do not allocate appropriate resources, your event will not be a success.
2. The host committee has to be held accountable. The committee's sole purpose is to help raise money, not publicize, not handle logistics, not put together name badges. Fundraise! Other volunteers can be enlisted to handle details.
3. You must control the costs of your event. Create a budget including catering, invitations, postage, phone calls, flowers, wine, etc. and add on a little more to that total for unexpected incidentals.
4. Set a price that is appropriate for your target audience. For example, if you are planning to host an event for trial lawyers, do not set your price at \$25! And do not set your ticket price based on your expenses plus a little more. Fundraising is more than just covering your costs with a little extra.
5. Ask yourself – will this event make enough money to make it worth our time?

6. Check both your personal calendar and a community events calendar. Do not host events during holiday seasons or during a week when there are already other events. Take care to avoid religious holidays.
7. A great idea, a catchy theme, and a good speaker will draw people to your events. However, they will not make it a fundraising success. The only way you can ensure success is to sell tickets and fill the room.
8. No free tickets. Ever. Events generally have some sort of catering cost. If you are going to give your speaker a free meal, be sure to either include that in your overhead cost or have someone “pick up” that ticket cost. What you want to avoid is the volunteer who asks for a free meal for his/her time. Do not be in a habit of “rewarding” people with complimentary tickets; 10 tickets at \$35 is a loss of \$350. Chances are that person asking for a free meal can afford the ticket cost.

In conclusion, do not underestimate in-kind giving. Your local florist might donate centerpieces, your local jeweler a speaker gift, your local office supply name badges. Work your non-profit status, and be sure to promise event exposure and acknowledgement for tax purposes.

While we are on acknowledgements, remember your follow-up thank-yous. The event is over, you are exhausted, but there is still work to do. You **MUST** thank your host committee, volunteers, and attendees! This is the way that you ensure you will have a host committee for next year, volunteers to help, and people to attend. In your follow-up to people who attend, why not include a return envelope? You are already spending postage to mail the thank you letter; a few people will include an additional gift, thereby paying for your acknowledgement mailing!

And finally, after the acknowledgements are done, create a record of people who attended the event and people who contributed. Those people will become part of your circle, and you will want to continue to cultivate them as regular donors. Add those people to your database of donors.

## D. Planned Giving

Planned giving is the umbrella word that fundraisers use to describe estate planning gifts like insurance plans, trusts, bequests, life income gifts and gifts of appreciated stock or securities, that are directed towards 501(c)(3) nonprofits or, in our case, the Education Funds, gifts to which are tax-deductible. The League is ripe for planned giving; our members fit the demographic for the most likely planned giver. The first step in developing a planned giving program is to focus on the easiest and most feasible planned giving vehicle, the bequest.

This information can sometimes be very complicated; so we will turn to a professional voice for real statistics. While the following article published in 2000 reports on a landmark study by the National Committee on Planned Giving (now called The Partnership for Philanthropic Planning), it has not been updated comprehensively. More

recent studies on various aspects of planned giving confirm the enduring nature of many of these earlier findings.



## From the Professionals

### New Findings on Charitable Bequests

by *The Sharpe Group*

A comprehensive nationwide study recently released by the National Committee on Planned Giving confirms many long-held theories about bequests and other forms of planned gifts. The study was based on a survey of 150,000 households, of which 11,000 identified themselves as planned giving donors. Among the findings:

- Charitable bequests were the most popular of all planned gifts. Of the 1,579 gifts studied, bequests accounted for 782, charitable gift annuities numbered 370, and there were 427 charitable remainder trusts.
- Only 42% of respondents have wills.
- Eight percent of the households reported that they have included charitable bequests in their wills. One percent of households responding reported having charitable remainder trusts. Both figures represent a significant increase since a similar benchmark study in 1992.
- While planned giving donors are spread across all levels of income, they do tend to enjoy somewhat higher income levels than the general population.
- Planned giving donors overall are older and less likely to have children at home.
- The vast majority also support charitable interests with cash gifts.
- Most bequest donors said that published materials from charities such as brochures, booklets, and newsletters were the primary source of information and motivation for their gifts. The same was true for a large percentage of charitable trust donors.
- Only about one donor in three has informed the charity of a bequest. The most common reasons for not telling the charity in advance were lack of desire for attention (53%) and privacy concerns (13%). This finding explains why charitable bequests can be influenced through marketing without necessarily discovering all bequests in advance.

#### Charitable bequests

The top reasons donors cite for making a charitable bequest are listed in the table below.

|   |     |
|---|-----|
| Desire to support the charity                   | 97% |
| The ultimate use of the gift by the charity     | 82% |
| Desire to reduce taxes (income or estate)       | 35% |
| Long-range estate and financial planning issues | 35% |

|   |     |
|---|-----|
| Create a lasting memorial for self or loved one | 33% |
| Relationship with a representative of charity   | 21% |
| Encouragement of family or friends              | 13% |
| Encouragement of legal or financial advisors    | 12% |

The majority of bequest donors include more than one charity in their wills, and most bequests (52%) are for specific amounts, although some include percentages (26%). Residual bequests (which are traditionally the largest source of bequest revenue and designate a portion of the estate after other disbursements) were reported by 14% of respondents.

The average age of a bequest donor is 58, and the average income level is \$75,000.

*This article was adapted from the December 2000 issue of Give & Take, published monthly by The Sharpe Group, 6410 Poplar Avenue, Suite 700, Memphis TN 38119, phone (901) 680-5300, fax (901) 761- 4268, e-mail: info@sharpenet.com, Internet www.rfsco.com. Copyright (c) 2000 by The Sharpe Group.*

What do the professionals tell us? We should be concentrating our efforts on bequests. The good news is that bequests are the simplest planned giving vehicle to promote. All a bequest means is that a donor needs to put the League in their will. The sample language used at the LWVUS Education Fund is:

“I bequeath to the League of Women Voters Education Fund, a charitable trust formed in the District of Columbia, with offices at 1730 M Street NW, Washington, D.C. 20036, (specify gift amount, percentage of estate, residual amount or property).”

The donor is able to leave a specific amount, a percentage of the estate or some piece of property. Over 95% of the planned gifts handled at the LWVUS Education Fund office are bequests. The administration of those gifts has been relatively simple and has required very little legal or professional advice. Ultimately, the donor works with his/her financial planner and attorney to decide on the gift, and the League accepts it.

The key factor in promoting planned gifts is to have a persistent presence. Let your members and donors know that “the League is open for planned giving business.” Let’s think of some of the ways that we can have a persistent presence on planned giving:



## Exercise

Where can you advertise your planned giving program for the League?

- Our local *Voter*
- In an insert to our acknowledgements
- At our Board meetings
- At our signature events and community dialogues

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Once you have started to build your persistent presence on planned giving, you can begin to expand your marketing tools. Perhaps you create a small flyer with a testimonial to include with your *Voter*. Maybe you devote a portion of your website to planned giving information. Perhaps you begin a bequest challenge and encourage as many people as you can to include the League in their will. The options are limitless!

As your League contemplates accepting planned gifts, you should develop both a gift acceptance policy and an investment policy. A gift acceptance policy defines (i) the types of assets that are acceptable gifts (ii) the forms of gifts that are acceptable and (iii) your League's role in gift administration. Your policy should allow for some flexibility in handling each case, but having a policy will prevent the acceptance of gifts that could cost your League time, money and possibly its reputation. An investment policy outlines and defines responsibilities and guidelines for the investment of assets given to your League. Consult the LWV Development staff for counsel on developing both types of policies. There is also a great deal of information available online provided by organizations such as the Association of Fundraising Professionals and your state or local Planned Giving Council.



**Resource:** There is a variety of information at [www.lwv.org](http://www.lwv.org) in the "Support" section about various planned giving vehicles accepted by the LWVUS Education Fund. These materials, with the exception of information about charitable gift annuities, can be adapted for use by your League.

One final thought as you embark on your effort to promote planned giving in your League. Remember to put a disclaimer on your materials that states: “This information is not intended as legal advice. Please consult with an attorney or financial planner when making estate plans.” Ultimately, you want your donors to be informed and educated about their planned giving vehicles. Your job, however, is to promote planned giving opportunities and encourage donors to seek professional advice.

## E. Corporate and Foundation Donors

The facts show that the majority of giving comes from individuals. While this manual is designed to focus on individuals, we will briefly cover corporate and foundation donors.

Your area’s community foundation is a great place to start in your search for support beyond gifts from individuals. Community foundations are independent registered philanthropic institutions serving a geographically defined territory, usually a city or administrative area (county, region and the like). They typically make grants to improve the life of the community and are supported by a broad range of individuals, businesses, etc., in the community.

If a national corporation or foundation is based in your community or has a regional office located in your community, it may have a philanthropic program established to benefit your community. These may be good avenues for your League to pursue.



### Remember...

#### **The LWVUS policy on Coordinating League Efforts at All Levels:**

A state or local League that wishes to approach a national-level corporation or foundation must first consult with the LWVUS/LWVEF about its plans. This consultation process is designed to maximize financial support for the League at all levels by coordinating efforts and helping to avoid alienating funders who prefer not to entertain multiple proposals from the same organization at one time.

To begin the consultation process, the interested League is asked to contact the LWVUS/LWVEF Development Division. (A local League should be prepared to provide evidence that its state League has endorsed the proposed contact with the funder.) The development staff will review the League's plan to determine that the proposed funding request is appropriate for the intended funder and that the solicitation will not interfere with LWVUS/LWVEF fundraising efforts.

There is a common misconception that a huge gift from a corporation or foundation will solve all financial problems. True, a huge gift provides a lot of money, but those gifts are rare and take a lot of time to develop.

Your best bet at getting your foot in the door with a corporation or foundation is through an individual you already know or have access to. Think about your circles again. Is there anyone in your circle who sits on a Board? Who is the president of a company? Who is a friend of a friend? The best way to gain entrance to a foundation or corporation is through an individual contact, and once you develop that person as a friend, all regular rules of individual fundraising apply.

Let's think about the people in your circle again. Where do most of those people live? They are in your community, and your immediate community should be the launching point for all corporate and foundation fundraising. Start with your local community foundation, your local businesses, your local banks, and your local vendors. Once you identify your targets (people) for solicitation, then you will:

1. Research the company and determine if they even make charitable gifts. Do the research to see what they have funded in the past.
2. If the company does make charitable gifts, determine what your organization has in common with the company. Remember, companies make gifts to reach new markets; so be sure to think of ways that this company can advertise and bring in new business. Focus on ways the corporation can benefit from being associated with the League.
3. Find out if the foundation or company funds organizations in your geographic area and if it accepts unsolicited proposals. See if it is possible to contact someone at the foundation or company to discuss your project and if your proposal might be of interest.
4. If the foundation makes gifts to organizations like the League, find out what the foundation's current priorities are. Target your proposal to the foundation's interests, but never develop a program just to fit a foundation funding stream. Be prepared for the possibility that you and the foundation may have nothing in common; if that is the case, move on. Also, avoid sending the exact same proposal to a number of foundations.
5. Remember your basics – *what is your need*, and what is your *case for support*? Both of these things will be vital for soliciting a gift from a company/foundation.
6. Find out if the foundation or corporation has a form or guidelines for submitting a proposal. Many foundations/corporations publish this information on their website. Some will only accept proposals that are submitted electronically on their form.
7. Once you have completed your research, reach out to your contact via mailed letter. Provide a brief synopsis of your funding needs, and articulate that you would like to speak with them in person. This is NOT an ask for money. Right now you are just trying to determine if they are interested. You may have more success in getting an appointment if you say that you are only asking for 15-30 minutes of their time.
8. Based on the initial company/foundation response from the letter, develop a further strategy for solicitation.
9. Tailor the scope of your project to the size of the foundation and how much they give in grants. For example, you might ask a small foundation for \$1,000 to publish your

*Guide to Elected Officials* while a large foundation might be receptive to a request for \$10,000 to print local *Voters Guides*.

10. Be sure you have the capacity to manage the project, keep track of expenses, evaluate the project, and report back to the grantor.

It deserves restating that approaching corporations or foundations with which you have no relationship is not the best use of your precious fundraising or volunteer time. Do not fire off a corporate request to Bill Gates at Microsoft—unless you know Bill Gates! Do not contact the Rockefeller Foundation for an unsolicited foundation gift if you do not have a relationship with a program officer!

Of course, there are exceptions to this rule. The League is well known for its work, and larger Leagues with more fundraising power may be able to develop relationships with corporations and foundations where there is not an established personal contact. If your League has this type of fundraising power, forge ahead! Just remember to do your research and proceed slowly as you develop your relationship with the funder. Do not expect a gift in the first year, but do expect to develop a long relationship with the Program Officer or Executive Director. Make your “ask” when the time is right and be sure to keep your funder informed and active in your project.

See Appendix 9 for a sample outline of what should be covered in a written proposal to a foundation or corporation. Finally, stay local, think about who is in your circle, do your research and use your personal contacts to solicit corporate or foundation support!

## V. Being a good steward

What does it mean to be a steward to your donors? Stewardship is a fancy term for being good to your donors, making sure that they can trust you with their money, and creating a relationship where you are friends, not just business partners. This gets back to our initial thought, that fundraising is less about money and more about creating friends...friendraising!

There are some basic elements of stewardship that are common to all fundraising:

- Prove to the donor that you are a trustworthy fiscal manager.
- Thank your donors, often and publicly.
- Provide your donors with exclusive opportunities to become closer to the organization.
- Provide your donors with access and information to your organization's work.
- Report to your donors.
- Welcome your donor's input.
- Honor the donor's intent for the gift and honor any gift restrictions.
- Help develop the donor's knowledge about philanthropy.

Acknowledgement is the first element of stewardship and the term that we use to describe the actions taken to thank our donors. The golden rule of acknowledgement is:

**You must thank your donor for every gift, regardless of the dollar amount.**

A personalized mailed letter is the best way to thank your donor. For a sample of an acknowledgement that the LWV of Maryland sends, please see Appendix 5. A letter is personal, appropriate, and allows the donor to retain a document for future tax reporting if the gift is to your Education Fund, 501(c)(3). In addition, enclose a contribution envelope to facilitate the donor's next gift. This will serve as a subtle yet inoffensive suggestion to give again with the only "ask" being the presence of the envelope itself.

Of course, donor acknowledgement becomes more sophisticated as gift size increases, and your "benefits" for your donors should be proportional to the gift. Said another way, for a donor gift of \$250, it is appropriate to send a thank you letter and mention the gift, with the donor's permission, in a copy of your annual report or a copy of the *Voter*. It is not appropriate to carve that donor's name into the side of a building!

Get to know your donors! One way to get to know your donors is to follow up your personal, mailed thank you letter with a phone call by one of your board members. See Appendix 6 for some sample questions and ideas you might discuss.



## Exercise

What are the ways that you thank (acknowledge) your donors? What benefits do you offer to your donors?

- Send a thank you letter.
- Mention that gift in a copy of the *Voter*.
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- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

Benefits are the most tangible “rewards” for your donor’s gifts. However, in being a good steward, you need to keep the cost of your donor benefits to a minimum. No donor wants to see their gift being used for silly rewards or costly productions. No donor gives money because they want a gift in return. They give because they care about the League, they support its work, they have a personal connection to the organization, they have a history with the League, or they value the mission and goals. Fancy gifts or rewards alone will never bring in gifts.



## Case Study

The LWV of Maryland Development Chair worked with her committee to devise a plan for “creative stewardship.” Their plan included the following ways to “acknowledge” donors:

- ☑ Invite important donors to be a guest at a candidate debate with a limited, small audience.
- ☑ Recognize significant donors in the *Voters Guide* (excluding candidates, elected officials, political parties and any other partisan groups.)
- ☑ Send all donors the *Voters Guide*.
- ☑ Send acknowledgements with the President’s personal signature and note.
- ☑ Have a Board member call that important donor at least once a year for a non-fundraising conversation.
- ☑ Send important donors any publications, candidate guides or other printed materials.
- ☑ Include important donors in any year-end financial reports.

Ultimately, good stewardship comes down to treating your donors well. And, treating your donors well also has a financial benefit. Donors who contribute to your organization once will likely do it again.

Recognize in both the appeal letter and the acknowledgement letter if the person has donated to the League previously. If possible, add something that recognizes that person’s previous involvement with the League, whether it is on the board or as a committee member

Think of the thank you letter as the beginning of soliciting the next gift. Repeat donors should be the bread and butter of your fundraising plan. Treat them as “insiders” who are part of the organization’s “inner circle.” Repeat donors can become lifetime donors and thus provide a steady source of income. Think of it this way: if you treat your donors well, they will treat you well, too!

# End

We have come to the end of a long journey. Hopefully, *Fundraising 101 – The League Way* has proven to be a useful tool in your initial education on fundraising. Let's go over some key things to remember:

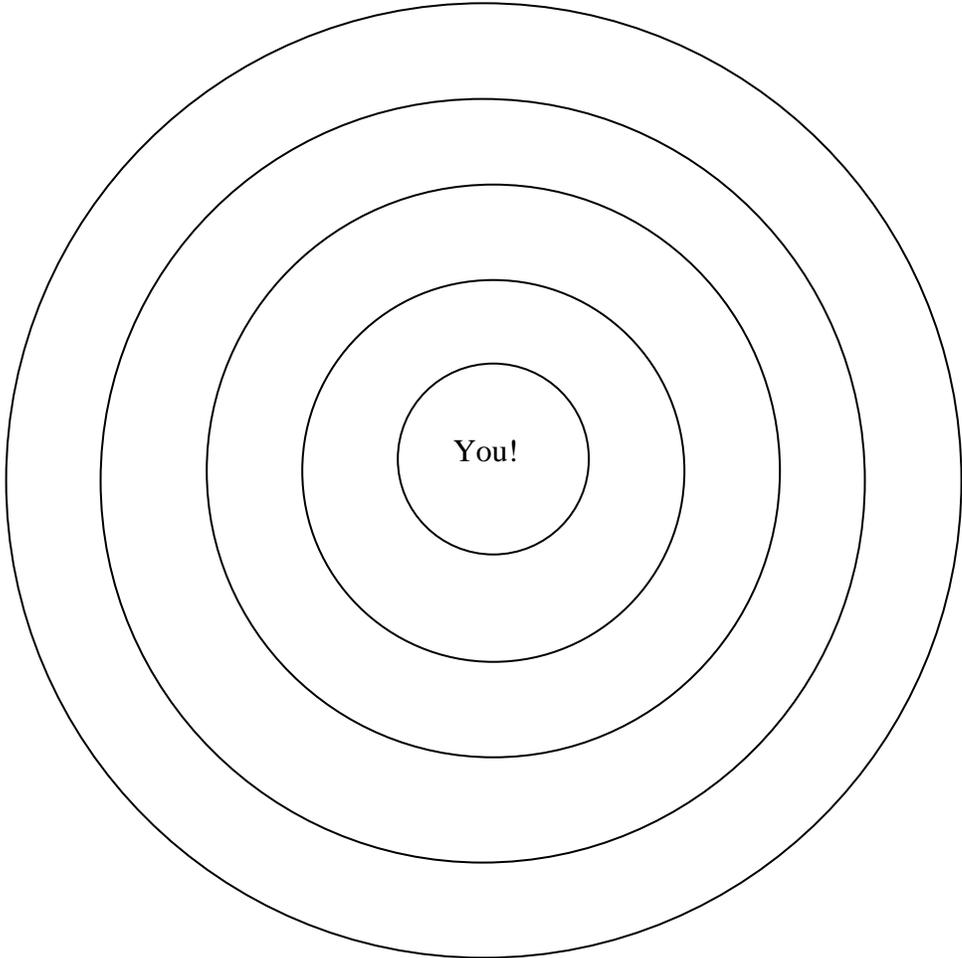
1. Remember, fundraising is not solely about money; it is also about creating friends. It is friendraising!
2. Remember, individual donors account for 81% of all giving. Concentrate your efforts on people, not corporations and foundations.
3. Remember, when you begin to think about fundraising, be sure to:
  - Identify your need* – why do you need money?
  - Develop a case for support* – why should someone support you?
  - Define your donor audience* – who should you ask for money?
  - Articulate your plan* – organize yourself before you start.
4. Remember, fundraising is the responsibility of ALL Board Members, not just the Development Chair.
5. Remember, members are easier to renew *before* membership expires!
6. Remember, you should ask your donors and members to consider an additional gift above and beyond what they already contribute or pay in dues.
7. Remember, the most successful fundraising events are planned with money in mind. You should articulate your fundraising goal from the onset.
8. Remember, you should have a persistent presence in planned giving.
9. Remember, corporations and foundations account for a very small segment of total charitable giving. If you choose to solicit corporations and foundations, do your research first!
10. Remember, be a good steward to your donors and acknowledge every gift. If you are good to them, they will be good to you!

Now you are prepared to begin fundraising for your League. Good luck!

# APPENDICES

# Appendix 1: Donor circles

Using the circles below, start to think about who is in your circle? You may want to consult your Rolodex, or e-mail address book. Think of those people that you have a good relationship with and who would be interested in the work of the League. Copy this chart for your Board Members.



## Appendix 2: Twelve month fundraising plan for the LWV of Moneyland

### Month One - begin fiscal year July

1. Recruit development committee members and assign general areas of responsibility.
2. Manage, update, and prepare donor lists or donor database. Remember to add people from circles and past events.
3. Determine feasibility of fall event, and then recruit Chair to begin forming a committee.
4. Secure space in October *Voter* for planned giving article or blurb.
5. Decide on timing of all mail appeals.

### Month Two - August

1. For fall event, set fundraising goal and determine the speaker, venue, and date.
2. Begin to draft guest list for event and design invitations.
3. Create system of tracking planned giving donors for your League.
4. Draft article or notice on planned giving for October *Voter*.

### Month Three - September

1. Develop concept and begin copy for year-end appeal.
2. Mail invitations and finalize details for October event.
3. Submit article or blurb on planned giving for October *Voter*.

### Month Four - October

1. Finalize copy and design for year-end mailing.
2. Prepare acknowledgement copy for year-end gifts.
3. Following October event, send thank you notes to donors, volunteers, etc. Add donor attendees and contributors to donor roster.
4. Reserve space in January *Voter* to acknowledge all donations from the calendar year.

### Month Five - November

1. Send year-end mailing.
2. Begin to draft copy and plot design for year-end recognition of donors for *Voter*.
3. Begin to plan for spring Annual Fund appeal.

### Month Six - December

1. Send acknowledgements to year-end donors.
2. Submit copy for January *Voter* to recognize all donors.
3. Draft copy for spring Annual Fund appeal.
4. Acknowledge any donors who have added the League to their estate plans.

### Month Seven - January

1. Finalize copy for spring Annual Fund appeal.
2. Determine feasibility of small spring event or convention sponsorship.
3. Reserve space in April *Voter* for a planned giving article or blurb.

### Month Eight - February

1. Mail February 14th League anniversary annual fund appeal.
2. Set fundraising goal and develop plan for convention sponsorship fundraising. Begin solicitations for sponsorship.
3. Draft article or blurb about planned giving for April *Voter*.

### Month Nine - March

1. Acknowledge donors who contributed to Annual Fund.
2. Complete and follow-up on outstanding solicitations for sponsorship.
3. Submit planned giving article of blurb for April *Voter*.

### Month Ten - April

1. Acknowledge donors who sponsored convention and add contributors to your roster of donors.
2. Plan small volunteer and Development Committee thank you event at home.
3. Assign Board Members to call and thank VIP Donors.
4. Develop call sheets and research for each donor for Board Member calls.

### Month Eleven – May

1. Board calls VIP donors and reports back results of calls.
2. Clean donor lists and data from over the year.
3. Host Development Committee and volunteer thank you reception.

### Month Twelve - June

1. Close out any development files and organize donor lists for next year.
2. Acknowledge any donors who have added the League to their estate plans since December.
3. Write transition memo to incoming Development Chair.
4. Begin feasibility planning for future event in fall.

## Appendix 3: Board Responsibilities for the LWV of Moneyland

- Attend all Board meetings, including annual retreats and convention. Board Members are expected to be on time, stay for the entire meeting, read board packets sent prior to the meeting, and be prepared to take part in meaningful policy discussions.
- Serve on or chair at least one Board committee (Member Services, Development, Voter Services/Citizen Education, Communications, Issues/Action) and as needed on special committees (Budget, Bylaws, Nominating, etc.).
- Serve as needed on a special project/activity. The level of time commitment would vary, especially if you direct the project yourself.
- Participate in strategic planning to direct how the League's mission is carried out and what projects/activities will be funded.
- Insure fiscal health for the League by providing personal financial support.
- In addition to making a personal contribution, support all fund raising activities and assist with some aspect of fund development, such as promoting a fundraising event, attending events and possibly serving on the event committee, writing or calling donors to thank them for their gift, writing a personal note on solicitation letters, adding names to the solicitation list.
- Provide fiscal oversight for the League by reviewing monthly treasurer's reports before the board meeting and submitting vouchers for expenses incurred as a board member.
- Promote the League and its activities in the larger community/state.
- Serve as a mentor to newer/younger members on the board and those League members in your community/League who could be potential leaders.

## Appendix 4: Sample outline of two-page fundraising letter for the LWV of Moneyland

Drop Date (*Date that the mail actually gets postmarked – should always be the same*)

Prefix First Middle Last  
Address  
City, State ZIP

Dear Prefix Last, *Always personalize your letters (mail merge function helps) and use a formal salutation. Some schools of thought suggest avoiding using first names unless the signer actually knows the individual. However, when you write as a League member to another League member, you may want to opt for the more informal approach to be more personal.*

*Your first paragraph should acknowledge your donor's past generous support. It should create urgency from the beginning and should begin to outline your determined need. Thank you for your continued support of the League of Women Voters of Moneyland. You have been a generous partner in our voter education work, and I hope we can count on your continued support in the vital months leading up to the local elections. Etc. Etc.*

*Your second paragraph should go into slightly more detail of your need, but you need to make an "ask" in this paragraph. I hope you will continue your outstanding support for the League and make a contribution today of \$100. Your gift at this level will make us doubly effective in accomplishing the critical work that lays ahead for the League of Women Voters of Moneyland. Etc. Etc.*

*Your third – six paragraphs should further detail the need and state the case for support. It should outline any major work that needs to be accomplished and answer WHY you need this gift so urgently. It should also address how the donor's contribution last year was so critical to your past success.*

*Your seventh paragraph should go back to urgency. This is a good place to create bullet points or to include vital statistics that can be looked at quickly.*

*Your eighth paragraph should be another "ask." Be sure to restate the urgency for the gift, and let the donor know that his/her participation is vital.*

*Your ninth paragraph should thank the donor for considering this request.*

Sincerely,

*Signature, should be of the President. A live signature can be really helpful, and if your President can put a small note of at the bottom of the letters mailed to personal contacts, that is particularly good. The more personalization, the better.*

Sally B. Smith  
President, LWV of Maryland

P.S. *Always, always include a P.S.* Your support this election season is critical, and I would like to count on your support by DATE. Thank you for responding today.

# Appendix 5: Sample acknowledgement for the LWV of Moneyland

Date

Prefix First Middle Last

Address

Address 2

City, State ZIP

Dear Prefix Last,

Your special contribution allows the League of Women Voters of Moneyland to continue its focus on Making Democracy Work. Thank you so much for your generous gift of \$XX received on DATE.

The League remains committed to empowering all citizens with the information they need to be active and informed participants in the democratic process. For XX years, citizens have looked to the League for unbiased information on the issues they care about most.

Your support will enable the League to expand its efforts to strengthen our citizen-led democracy and bring much-needed reforms to our election administration systems.

Thank you for supporting the League of Women Voters of Moneyland as we continue to provide unbiased and nonpartisan information about issues, elections, and candidates running for office.

Sincerely,

*(Add in a live signature, if possible, and personal handwritten note to the right.)*

NAME

Chair

*This letter serves as official documentation of your gift for your tax records.  
No goods or services were provided in exchange for this gift.*

# Appendix 6: Know Thy Donor

## **Know thy donor**

Cultivate and educate until asking for a donation is like picking ripe fruit off a tree. Follow-up with donors.

Develop a “know thy donor” program by calling donors and asking them for their input about the League. Start with your major donors and think of the calls as a “Thankathon.” First, thank the donor; then:

### **Ask members:**

- How did you come to know about the League or become involved with the League?
- What advice do you have for the League?
- How better could we be telling our story?

### **Ask non-members:**

- What do you know about our organization?
- What images come to mind when you think of us?
- How did you come to know about us or become involved with us?
- What do you like about being a friend of our organization?
- Where or how do you think we are really missing the boat?
- What advice do you have for us?
- What cues might we have missed from you?
- How could we tell our story better?
- What could we do to involve more people?

Remember that when people give significantly to your League, they feel like part of the family.

## Appendix 7: Ideas for Events for Local Leagues

Keep in mind that events take much volunteer time and serve two purposes—visibility for your League and fundraising for your League if you are careful with your budget.

1. Luncheon or dinner
  - a. Honor someone or do a roast
  - b. Ask the honoree for a list of people to invite
  - c. Have a speaker
  - d. Hold a silent auction at the same time.
2. Bed and breakfast—Members donate an overnight stay and breakfast in their own homes. This fundraiser is especially good in a college town for weekend football games or in a travel destination. Be sure to charge the market rate; don't give the B&B away for a cheap price.
3. Lecture series for the public and members. Sell tickets. Use local speakers.
4. Lunch with a Legend at a member's home—should be a small, intimate luncheon that allows attendees to talk with the "legend." Attendees determined by top number of highest bidders, number to be determined by hostess. The Legend could be a celebrated member, a newspaper reporter or editorial page editor, a respected professor, a former elected official.
5. Earned income—Conduct elections for various groups, like housing authority's resident council, neighborhood associations.
6. Raffles—Limit the number of tickets offered and get meaningful prizes donated, e.g. symphony tickets, an overnight at a hotel, a complimentary dinner for two at a restaurant, a manicure, a haircut by a stylist, etc.
7. Home tour—Set up three homes for the tour based on interesting architecture, location, art or interior décor in the house, environmentally friendly aspects of the home, etc. Sell tickets to members with a discounted second ticket if the member brings a guest. This can be a fun way to recruit members.
8. Stay-at-home tea—Select an honoree. Send a letter to members and friends asking them to write a tribute letter or letter of appreciation to the honoree and mail it to the League along with a donation in honor of that person. In the letter, tell them that the honoree will be presented with the letters, a list of the donors, and a report on the total amount raised by a certain date.
9. Phonothon—Call previous donors. Could focus on lapsed donors.

## Appendix 8: Fundraising timeline for the LWV of Moneyland major fundraising event

|                      |   |
|----------------------|---|
| 11 – 16 + Weeks Out: | Feasibility<br>Set fundraising goal / ticket price.<br>Decide general locations.<br>List possible event spaces/hosts.<br>List prospective speakers/special guests.<br>* Identify Event Chair and begin assembling a committee.*<br>Set calendar & event date. |
| 10 Weeks Out:        | Draft host committee letter.<br>Develop list of high dollar donor prospects and special guests for host letters.  |
| 9 Weeks Out:         | Mail host committee letters.  |
| 8 Weeks Out:         | Make follow-up calls to host committee.   |
| 7 Weeks Out:         | Set deadline for host committee members.<br>Finalize invitation copy.<br>Secure location.<br>Develop guest list, including donors, members and invited guests.  |
| 6 Weeks Out:         | Finalize list of special guests and non-League attendees for invitation list.   |
| 5 Weeks Out:         | Mail invitations to all.<br>Develop system to manage RSVP's.  |
| 4 & 3 Weeks Out:     | Make follow-up calls to non-responders.   |
| 2 Weeks Out:         | Following the due date for RSVP, provide final count of attendees.<br>Research VIP attendees for donor dossier.<br>Create program for event.<br>Confirm speaker topics.<br>Finalize pledge card / envelope.<br>Prepare name tags and take-away items.         |
| 1 Week Out:          | Finalize details for program.<br>Give final counts to caterers.<br>Brief Board Members / President on approach and ask strategy for major donors and VIPs.  |

Post Event:

Acknowledge Host Committee/ Event Committee / Donors / Special Guests and Attendees.

Send pledge confirmation & envelope and follow-up on outstanding donor asks.

Prepare report on donors who attended and what follow-up was done with them.

Analyze rate of response, profitability & “success” of event.

Add attendees and contributors to donor roster for future solicitation.

## **Appendix 9: Basic content of proposal to Foundation or Corporation**

When a foundation or corporation does not have a prescribed format for submitting a proposal, write a brief letter covering the following points.

1. **Introduction:** Summarize the entire proposal in the first sentence. Identify your organization's name and that it is a 501(c)(3). Tell the funder what your project is, how much you are asking for, and why the request is relevant.
2. **Why you?:** Explain why you chose this organization to receive your proposal and why your project would be of interest to this organization.
3. **Need statement:** Explain the current problem and how addressing the problem is part of your mission. Explain how supporting your project can also benefit the foundation or corporation. Use statistics, quotes, solid reasoning, surveys, or whatever evidence you have. Just be sure to keep it simple.
4. **Describe project:** List steps you will take to solve the problem. Add a timeline that is reasonable and allows you sufficient time to deal with unanticipated obstacles.
5. **Establish your credentials:** Briefly describe the League's history, why you are a credible organization, and who your leaders are. Mention the added value that volunteers bring.
6. **Evaluation:** Explain how you will evaluate the project.
7. **Budget:** Prepare a budget showing how you expect to spend the money you are requesting. Be sure to include a portion of your fixed expenditures such as office rent, telephone, internet, copier, supplies, and staff time. Keep your budget reasonable; only ask for a piece of equipment if it is germane to the project. If you are asking the funder for only a portion of the overall project, delineate the costs to be met by the funding source and those to be covered by other parties.
8. **Say thank you:** Thank them for considering your proposal, offer to answer any questions they might have, and provide a way they can contact you.
9. **Signature:** The proposal should be signed by the president of the League with his or her title.
10. **Attachments:** Provide a copy of your 501(c)(3) letter, or that of the state or national Education Fund if your League has an account there, your board list, and whatever else the foundation requests. They may want your League's overall budget and an annual report.

# Appendix 10: Job Description, Development Committee Chair

The Development Committee Chair leads the Development Committee whose functions and duties include developing financial resources to support the League's mission.

**Accountable to:** The President or appropriate Vice President

**Committee members:** The Chair is a member of the board. The committee will consist of representatives from the board and non-board League members.

**Responsibilities:** The committee's overall charge is to create and implement a system for soliciting individuals (League members and individuals in the community) and community based businesses and companies and foundations for donations and grants, resulting in sustained revenues. This system will have good record-keeping, donor acknowledgement capability, and a plan for donor retention.

## Primary Responsibilities

**DEVELOP THE CASE FOR SUPPORT:** See pp.9-10 in *Fundraising 101* for basic information on developing your case for support. Case statements generally include:

- Description of the problem or need that the project or general activities will address.
- Description of the project or activities designed to address the problem or need.
- Organizational information: history, mission, goals
- Personnel to carry out the project or activities
- Budget for the project or activities

**DEVELOP THE FUNDRAISING PLAN:** See Appendix 2 for a 12-month plan and Appendix 8 for a timeline for an event in *Fundraising 101*.

- Appoint a Development Committee from your board and non-board League members.
- Brainstorm and select possible fundraising activities.
- Identify person responsible for each activity.
- Establish a 12-month plan to implement the development activities.

**DEVELOP SYSTEMS TO SUPPORT DEVELOPMENT EFFORT:**

- Create and maintain data base/ mailing list of individuals for solicitation, including past and present board members, volunteers, donors, committee members, sponsors, local foundation representatives, locally based corporations and small businesses, and likeminded community members.
- Maintain records of donations.

**CULTIVATE DONORS:**

- Ensure that acknowledgement letters are sent to donors.
- Find appropriate ways to recognize donors, such as in *VOTER*, in Annual Reports, and at events.

**REPORT:**

- Report to members the results of the development activities.
- Collect stories about the results of the League's work as it affects people and systems to report the results of their contributions back to donors.

## **Appendix 11: Other resources from LWVUS**

1. The LWVUS Development Department is pleased to help individual Leagues. If you have a specific question or would like to “try out” an idea, the staff is able to help. Just contact the Development Director to “troubleshoot” your question and pass it to the appropriate staff member.
2. Be sure to visit the “Support” section of the LWVUS web-site for more information on League giving programs.