



Building a Reliable Stream of Revenue Through Individual Giving

Lessons Learned

While crafting your workshop, we had many conversations around lessons we learned the hard way (through experience)! Below, we share some of those lessons in the hope that they will help you leverage opportunities, avoid our mistakes, develop confidence, and Save Them All.

DIRECT MAIL LESSONS

- **Make sure you're measuring your results.** You should be learning and continuously improving.
- **Working with clean data is key.** Make sure your donor names, salutations, addresses, and communication preferences are clean so that mail will be delivered to the right people at the right time.
- **Donors should feel empowered to adjust their communication preferences.** Be sure to have processes in place to address donor communication requests quickly, and ensure that those preferences are honored consistently.
- **Avoid downgrading or asking for too much money by customizing your asks amounts based on donor giving history.** Animal Care & Control Team of Philadelphia (ACCT Philly) example: They used custom ask strings on their 2018 holiday appeal for the first time and saw a \$20 average gift increase.
- **Having a privacy policy in place is critical,** both in terms of building donor trust as well as responding to data sharing requests.
- **Acknowledge gifts as quickly as possible.**
- **When writing an appeal, you should create a connection with the agency and an animal that has benefitted from its service.** Images with good eye contact tend to perform better. Dogs tend to perform better than cats. The outer envelope should have a compelling teaser that will motivate the reader to open the envelope. The call to action should be summarized in the P.S. (postscript) of the letter, as most readers skim the letter and read only the P.S. Having a single

call to action (usually donate) is important so the reader isn't distracted by too many competing messages.

DIGITAL LESSONS

- **Digital is changing constantly.** You need to change with it.
- **People are not going to read all your emails**, no matter how brilliant you think they are. They're going to skim and sometimes skip them entirely. You have to look at everything through this lens. You have to make it easy for readers. The second your reader says "Wait, what?" you've lost her.
- **Be a ruthless editor in all digital communications.** People are reading your content in a few seconds, on the train, in line waiting for coffee, or who knows where. You have just a moment to engage them.
- **Your website navigation should not look like your org chart.** Categorize information based on what people want and are interested in, not what your leadership (or you) wants or is interested in. Use your data to make these decisions or just ask your site visitors with an (easy) survey.
- **Too much data is just as bad as too little data.** Pick the metrics you care about and focus on those.
- Testing is great but testing takes resources. **Don't waste your time testing best practices.** They're best practices for a reason.
- Accept that **you are often going to be wrong** about the results of your tests. That's the whole reason you're testing.
- Remember that you are not your donors. What you like is not necessarily what they like.
- **Have a privacy policy** for your digital communications and digital data collected. And don't be creepy with your targeting.
- **Don't get derailed by vanity metrics:** A smaller engaged email list beats out a big one filled with people who don't want to hear from you. A giant Facebook following doesn't do you any good if you aren't engaging those people in a way that is meaningful for them.
- Gather data where you can, but accept that sometimes, donors are going to want to give in many ways online. Be where they are and put their needs first.
- **It's not about you. It's about your donors.** Put them at the center of everything. They are the heroes of your story.

MAJOR GIFT LESSONS

- Set realistic and attainable goals and work your plan.
- Work as a we, not an I (committees and teams).
- **Raising money becomes very personal.** Always work with integrity, honesty, and do what you say you're going to do.
- **Securing major gifts is based on relationships, and that takes time.** It is not unusual for major gift cultivation/solicitation to take 18-24 months to be successful. **You cannot rush that kind of relationship building. This is why you must have major gifts at varying levels of readiness-for-solicitation in your pipeline at all times.**
- **The bulk of individual wealth is held in non-cash assets.** Learn to be comfortable talking about things like publicly traded securities and work towards increasing your organization's capacity to accept them.

PLANNED GIFT LESSONS

- **A planned gift IS a major gift.** Planned gift donors have elevated your agency to the level of family. Think of them in the same way that you think of major donors and treat them that way!
- Don't worry about when planned gifts mature. **Do the right activities and the money will follow.**
- **Planned giving should NOT be the last program you build out.** One mature bequest can change your agency's future in dramatic ways.

FOUNDATION PARTNERSHIP LESSONS

- **Foundations are people, too.** Make this your motto! Foundations are institutions and grant decisions are made by committee, but behind every foundation and committee are *people*. Build relationships with foundation staff and trustees like you would with any other donor. Treat them as *partners*, not just *funders*.
- **Make the reader's job easy, not hard.** This means following all formatting rules, answering required questions, and making grants easy to read. Write concisely and clearly, avoid jargon, and use subheading and bullet points, when appropriate. Respect space limits. Every word counts.
- **Always tell a story.** While grant writing tends to be more technical, remember that your reader is a person who will, to some degree, be influenced by emotion. Tell a positive story of an animal or person touched by your organization's work to help the reader make an emotional connection. Storytelling should be balanced with data and program impact in a grant.

- **Make the foundation the hero.** Your organization does amazing work, but your supporters and partners make it possible. They are the heroes of your story! In grants, sprinkle in language like, “With your help, we can...” and “Thanks to you, 100 cats were saved...” and “Support from the foundation will help transport 50 dogs...” This helps make foundations feel like partners in the cause.
- **Plan ahead.** Pulling an all-nighter to meet a grant deadline is no fun. Give yourself plenty of time to write the grant and be sure to give your colleagues plenty of notice to compile and send program information and budgets to you.
- **Only promise what you can deliver.** Don’t just follow the money and make promises that you can’t keep. Know your abilities and limitations. Only commit to reasonable program impact and evaluation. You should always (and may be required to) report back to the foundation, so don’t set yourself up for failure.
- **Stewardship is everything. Practice next-level gratitude.** When you’re awarded a grant, say thank you immediately. Check reporting requirements and set reminders. Surprise and delight the foundation with program updates, stories, and photos throughout the year. Send your annual report. Submit grant reports, even if they aren’t required. Invite trustees and staff to events or coffee, to visit your facility, walk dogs, or trap cats! There are many ways to show your partners how much you appreciate them.
- **Say thanks and follow-up if your grant is rejected.** Your grant was rejected. Now what? Thank the foundation for taking the time to review your grant. Ask if there is anything you can do differently in the future to have a more competitive proposal. You may determine better program alignment with the foundation or gain valuable feedback for your next proposal.

Your Best Friends 2019 Fundraising Workshop Team

- Annual Planning and Direct Mail: Barbara Camick, Carly Dy-Buncio
- Digital: Amy Starnes
- It’s All About the Relationship Panel: Kelly Cramer (Foundation Partnerships), Sharon Krinsky Davis (Major Gifts), Andrea Grane (Planned Giving)
- Facilitator: Trish Tolbert