

Continuing the Good Amid An Economic Crisis

Fund Development Advice for Thriving During Uncertain Times

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1. **Increase fundraising activity** – Now is the time for action – not indecision. This is not the time to be silent with your donors. They need to hear from you to know the importance of the need you are serving. This is a great time to build relationships with contacts through personal visits, phone calls, email, personal notes, newsletters and direct mail. Thank every donor seven times.
2. **Communicate your mission** – Have a compelling mission and vision that your donors can fully support. Review your mission, refine it, and make sure you can communicate to your donors your organization’s impact on those you serve and on the community. Your donors don’t give to you because you need it, but because of the impact you have on those you serve and on the community.
3. **Diversify your donor base** – 75% of all charitable giving comes from individuals, with the remainder coming from foundations and corporations. Make sure you have a strong compelling message for individuals, both for direct gifts as well as deferred gifts. This is the time to communicate personally with major donors, by phone and personal visit. Younger donors are emerging as a newly found source of philanthropy. Make contact with foundations and corporations to determine their giving priorities and guidelines. New foundations are emerging every day.
4. **Update your fundraising plan** – What! You don’t have a fundraising plan? Create one! How do you know what to do without a plan? Your fundraising plan is your toolbox. Have a fundraising plan that includes diverse funding streams as indicated above. Diversify your fundraising methods. Use special events, direct mail, email, your website and newsletters to acquire and solicit donors. Work on upgrading donors that consistently support your annual campaign. Major donors deserve phone calls and personal visits during this time. Make sure your marketing and communications strategies are in tune with your fundraising plan.
5. **Pay close attention to your professional fundraising staff** – Now is not the time to lose exceedingly good people who are key to your success and future growth. The best professional fundraisers will be in high demand. Invest in your team – give them the best training and development in fundraising techniques and strategies that is available. Locate a good coach to give them new ideas. Make sure they know how valuable they are to the success of your organization. Pay them well. Set a good example for them in commitment and dedication to your mission. Meet regularly with your development staff to discuss what is working and what is not, and determine how to make it better. Make sure you are doing all you ask them to do. Lead by example.
6. **Above all, don’t panic!**

7. The sky is not falling!
8. “The sun will come up...tomorrow!”
9. This is not a time to “wring our hands!
10. Hope is not a strategy.
11. This is the time for decisive action...clear thinking...to focus on key issues!
12. Don’t let financial or any other news determine your fundraising strategy.
13. Contributions have increased in current dollars every year except one, since 1980.
14. Donors will find a way to give when times are bad.
15. “Philanthropy in America is more deeply rooted in our culture than equity share prices.”
16. In fundraising, these truths are self-evident:
 - ▶ Money is not given, it has to be raised!
 - ▶ Money is not offered, it has to be asked for!
 - ▶ Money does not come in, it has to be gone after!
17. Make sure you are communicating a compelling case for support to your donors.
18. Concentrate on your major donors– those that have supported you in the past.
19. Update your development plan and develop strategies to increase funding.
20. Not everyone is affected equally. Some donors are doing very well.
21. Don’t try to protect your donors’ pocketbook...they do that very well!
22. Read the newspaper; watch the news; read annual reports to find new prospects.
23. Your competition is working just as hard, if not harder, than you are.
24. Make sure your organization stands out from all the rest.
25. Make sure your message is inspirational...conveys hope...is donor centric.

26. Your message should make the strongest, most updated statement of who you are and the value you bring.
27. Your message should contain your most recent accomplishments.
28. Your message should emphasize the seriousness and immediacy of your needs.
29. Your message should demonstrate clearly the emotional impact of changing lives.
30. When times are bad...needs grow...they multiply!
31. Your best prospect is the donor who has just given you a gift.
32. Now is the time for dedication to building relationships.
33. Reach out to your supporters of every level and type.
34. Emphasize to your donors your commitment to the mission of the organization.
35. Tell your story every day. Thank each donor at least seven times for their gift.
36. Communicate your results and impact to your donors.
37. Be creative in how you use hard data and real life examples to illustrate your success.
38. Make outreach personal:
 - ▶ Write a personal note.
 - ▶ Pick up the phone and tell what a difference the gift made.
 - ▶ Visit major donors whenever possible to thank them for their gift.
39. Communicate to your board that all board members are expected to be donors.
40. Set your vision to the future; build a better board.
41. Begin to identify and cultivate potential board members from across different sectors of the economy; some will recover quicker than others.
42. Be candid. Ask board members to lead with their own personal resources to set an example of generosity that will inspire others to give.
43. The strength of your organization is directly tied to the commitment of your voluntary leadership...your board.

44. All of your development efforts should be geared toward making your donors feel special.
45. Your donors must believe that their dedication and generosity is appreciated and crucial to your organization's work.
46. It is important not to put a hold on your fundraising efforts during this time.
47. With over 1 million public charities in America, those who hold back will lose ground to those who move forward.
48. Revisit tactics and adjust strategies to improve fundraising results.
49. Fundraising is "rule-based!" Best practices are the rule in good times...but essential in bad times!
50. Work with donors to make it easy for them to give.
51. Adjust pledge payment periods to donors' needs.
52. Negotiate the terms and conditions of giving.
53. Don't wait for a donor to come to you with payment questions. Go to them if it appears they need help.
54. Deferred gifts may be especially attractive to donors at this time.
55. Charitable Gift Annuities may appeal to older donors during times of low interest rates.
56. Remind older donors that the IRA Rollover has been extended through 2009.
57. Donors over age 70 are required to take the minimum distribution from their retirement account. Remind them of the tax advantages of a gift to your organization.
58. Remember that donors give to meet "their needs" more than they give to meet "your needs."
59. Donors who give regularly, every year, are your best prospects, not only for current gifts, but also for deferred gifts.
60. Ask your donors how they wish to give...now...through their will or estate...or both!

61. Continually look for new donors. Ask your board for suggestions.
62. Use special events as a way to add names to your prospect list.
63. Contact donors who have lapsed...they gave last year, but not this year.LYBNTs!
64. Contact donors who have not given recently...they gave some year, but not this year...SYBNTs!
65. Ask your board members to invite their friends to point of entry (POI) gatherings in their homes to introduce prospects to your organization and mission.
66. Build for the future – Focus on cultivating long-term interests, investment and relationships, rather than short-term gifts.
67. Concentrate on your current donors...they are your best investment for future gifts...they believe in the mission of your organization.
68. Be transparent. Tell your donors precisely how their gifts have been used and how much they are appreciated.
69. If you don't have an accredited professional fundraiser, hire one! You will benefit from their skills, ability, training, dedication, and commitment to ethical fundraising.
70. Meet regularly with your development or fundraising staff to review strategies for determining what's working...what's not working...and why!
71. Set clear, realistic, but challenging goals for fundraising staff, giving them responsibility for meeting benchmarks.
72. Develop practical, understandable measures of progress – daily, monthly, and annually – to show if the desired results are being achieved. If not – adjustments can be made.
73. Develop ethical methods for motivating fundraisers who achieve measurable and desirable results from their efforts.
74. Streamline and increase communications between staff and leadership. Make sure everyone know what is going on and why.
75. Preserve essential training and development programs that improve skills that are highly desirable for achieving maximum results.

- 76.** Make sure fundraising plans have measurable goals that include the identification, cultivation, and solicitation of donors, including individuals, foundations and corporations.
- 77.** Build stronger donor relationships with current funding sources, particularly at the major support level, and focus budgets and resources that strengthen these relationships.
- 78.** Convey a sense of urgency, but not panic to donors.
- 79.** Be specific about the projects or programs for which the organization needs support.
- 80.** Educate your donors and volunteers constantly about how the organization's services and programs are more valuable...and needed more than ever in the current economic climate.
- 81.** Get back to basics in your communication with donors and constituents. Present the organization's needs from a donor's point of view. This may be the time to avoid "glitz!"
- 82.** Improve communications and giving strategies, especially through online or Web-based communications and links with other Web sites.
- 83.** Open new doors with the media, such as print, broadcast, blog and Web portals.
- 84.** Use new databases and information from marketing firms to identify new prospects and donors.
- 85.** Maximize contacts and network with professionals, associations, publications and web resources to find out what other organizations are doing to strengthen their donor base.
- 86.** Research current donor and prospect records to learn where strong support exists and where potential contributions may be realized.
- 87.** Review major pledges to ensure that they are still viable and can be used in budget projections; extend them if needed so that the gift is not lost.
- 88.** Focus on your top prospects first. It is foolish to squander your efforts on small donors until you've approached all of your best prospects. You begin by seeking the largest gift first—the one (at the top of your gift table) that is needed to make your campaign a success.

- 89.** Don't think your organization deserves support simply because it is a good cause. You must cultivate donors to win them over.
- 90.** Don't think that someone else can raise the money...you must ask for the gift.
- 91.** Don't think that publicity will raise money...it helps, but you still must identify, cultivate, and ask for the gift.
- 92.** Don't think that because people or wealthy they will give to you...you must establish the relationship and ask for the gift.
- 93.** Don't think you can whisk wealthy prospects in at the last minute...you must devote time to cultivate the relationship and ask for the gift.
- 94.** Don't think you can raise money by the multiplication table. If you have 1,000 donors, not all will give \$1,000 each. Some will give \$10, some will give \$1,000 and some will give none.
- 95.** Don't think you can raise money without deadlines. Most of us are procrastinators. You must press for specific accomplishments within prescribed deadlines. You need a campaign schedule with target dates understood by all.
- 96.** Don't think you can raise money without a strong rationale. Why do you need the money? What will it achieve? Who will it benefit?
- 97.** Don't think you can raise money without setting a realistic goal. Saying, "We'll raise as much as we can," is not a strategy. Rather, a tenable dollar goal should emanate out of your organization's growth pattern and the (evaluated) financial ability of your prospect list. It should inspire your volunteers, make them work harder than they expected, and give them the unmatched thrill of victory.
- 98.** Don't think you can raise money without a committed team of trained solicitors. No matter how virtuous your project or organization, most prospects need to be sold on contributing. You must, therefore, have a team of highly trained solicitors—a "sales force," if you will.
- 99.** You must research and evaluate prospects in order to know what to ask and how much.
- 100.** You must ask for the gift...otherwise it will not happen!

101. You must find the right person to ask. “The right person, asking the right person, for the right amount, at the right time, for the right purpose,” is an old but enduring maxim in fundraising.
102. You must ask for a specific gift. . "Will you join me in giving \$500 to the Salvation Army?" leaves no doubt as to the size of gift the solicitor is requesting. Most prospective donors need and want guidance. By requesting a specific amount, you show that you've given thought to your request and you put the prospect in a position of having to respond.
103. You must see your top prospects in person. While there are dozens of ways to solicit prospects, nothing beats the personal request. The adage "people give to people not to organizations" is another way of phrasing this principle.
104. Make sure your special events are cost-effective, and need to continue, particularly with respect to labor outlay and revenue return.
105. Review all “fee for service” activities to make sure you are achieving maximum results. Discontinue those that are not productive and increase or enhance those that have capacity for increasing income.
106. Review employee responsibilities to make sure that the workload is distributed fairly. Some employees are capable of taking on more responsibility, but they need to be rewarded for their efforts.
107. Work with your board to determine ways they can do more to advocate for your organization, to open new doors of support, identify new donors, or reach new markets.
108. Make every effort to collaborate with other organizations in your community that have similar, compatible programs and whose mission is compatible.
109. If it makes sense, consider whether merging with another similar organization is in the best interest of your organization and the community.

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