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FUND RAISING FOR SOCIAL CHANGE



KIM KLEIN

WILEY

Kim Klein

FUNDRAISING



for
SOCIAL CHANGE

Seventh Edition

WILEY

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*To my longtime and very dear friend,
Myn Nancy Adess, who has been my editor
(sometimes on very short notice) for more than thirty years.
I really couldn't do it without you.*

The Instructor's Guide for the seventh edition of *Fundraising for Social Change* includes a course description and syllabus, with week-by-week questions for discussion, writing assignments, small-group exercises, and case studies of ethical dilemmas. It also describes in detail the eight-week field placement component of the class. If you would like to download and print a copy of this guide, please visit:
<http://www.wiley.com/go/fundraisingforsocialchange7e>

The online content accompanying the chapters indicated below is available for download at: <http://www.wiley.com/go/fundraisingforsocialchange7e>

ONLINE CONTENT

Chapter 1: Nonprofits and the Money They Raise

"Unintended Consequences: How Income Inequality Affects Fundraising," Kim Klein, *Grassroots Fundraising Journal*, May/June 2015

Chapter 5: The Importance of a Good Board of Directors

"How Does Your Board Measure Up?" Stephanie Roth, in *Raise More Money: The Best of the Grassroots Fundraising Journal*, Kim Klein and Stephanie Roth, eds., Wiley, 2001

Sample Fundraising Pledge Form (Board of Directors), created by Stephanie Roth.
"Finding the Right Fundraising Structure for Your Board," Priscilla Hung, *Grassroots Fundraising Journal*, Jan/Feb 2012

Chapter 6: Financial Needs and Fundraising Strategies

The Ladder of Engagement: One Way to Consider Organizational Growth and Individual Donors

Chapter 8: Getting Comfortable with Asking

Why Are People Afraid to Ask for Money? by Kim Klein

Chapter 10: How to Ask

Asking for Money: Fifteen Useful Tips, Klein & Roth Consulting
Tips for Meetings with Donors and Prospects, Klein & Roth Consulting

Chapter 17: Special Events

Sample House Party Invitation

Chapter 28: Conducting Feasibility Studies

Sample Feasibility Study Cover Letter
Sample Questions for Feasibility Study
Sample Feasibility Study Report
Case Study of a Feasibility Study: Family Matters, by Kim Klein

Chapter 29: Developing a Budget

"'Outing' Overhead," Kim Klein, *Grassroots Fundraising Journal*, Nov/Dec 2003

Chapter 30: Creating a Fundraising Plan

Sample Monthly Fundraising Report
"Fundraising Planning Worksheet: A Tool for Creating Your Annual Fundraising Plan," Stephanie Roth, Mimi Ho, and Priscilla Hung, *Grassroots Fundraising Journal*, Sep/Oct 2007
Sample Fundraising Plan

Chapter 37: Know What You Need to Know

A Donor Bill of Rights
Code of Ethical Principles and Standards, Association of Fundraising Professionals

Online content titles have been added at the end of each chapter in which they appear with the title of the resource only, not full citations. Full citations appear here.

ACKNOWLEDGMENTS

I cannot name all the people who have contributed to this book. They include people in my workshops, people who send me questions through my online column, “Dear Kim” (published by the Grassroots Institute for Fundraising Training), my clients, and people with whom I work as a board member and volunteer helping to raise money.

But I must single out a few people: First, my partner in life and work, Stephanie Roth, who, for nearly three decades, has shared her experience and knowledge about fundraising and organization development, and who keeps me grounded and makes me laugh every day. I thank my team at Klein and Roth Consulting: Nancy Otto, Rona Fernandez, and Stan Yogi.

And I thank the person who first encouraged me to go into fundraising in 1978, Madelyn Stelmach, who continues to be one of my dearest friends.

INTRODUCTION TO THE 7TH EDITION

This is a how-to book. Its goal is to provide organizations with budgets of less than \$2,500,000 (which describes the vast majority of nonprofits) with the information they need to establish, maintain, and expand a successful fundraising program that is based on individual donors. A large number of individual donors who support the important work of an organization year in and year out give organizations maximum freedom to pursue their mission. This book will be particularly helpful to nonprofits with one or two staff people and a large number of active volunteers.

As with all the writing I have done on fundraising, this book is based on experience and observation. I wrote the first, second, and third editions of this book because there was almost no written information about fundraising for small organizations working for social change. Most of my writing has been an effort to teach organizations how to translate more traditional fundraising strategies practiced by large, mainstream organizations to their own settings. But in my lived experience as a development director, executive director, then as a trainer and consultant, I could see that activist organizations had a lot of important information to share but didn't have the time to write it down. The fourth and fifth editions of *Fundraising for Social Change* had the advantage of other literature and research to draw on, and, of course, I had much more experience myself.

In the sixth edition of the book—and particularly now in the seventh—knowledge is no longer in short supply. Anyone can type a question about fundraising (or anything else, for that matter) into a computer search engine and find dozens of websites, articles, videos, examples, and opinions. In this edition, then, I decided to focus on the question of added value: What does a book do that the

Internet—the greatest source of how-to information that can be imagined—cannot? In this edition I have focused on consolidating information that would take hours of searching to put together, describing strategies in simple and easy-to-use language, and vetting information so that everything in the book I know to be true. That is, I know that what I say here works for small to medium-sized social change organizations (and all kinds of other nonprofits). That doesn't mean the strategies described here will always work in every circumstance, and it doesn't mean I have described every possible way to raise money, but I have given a framework that will allow you to explore what works for your organization and your issue, and that will help you know how to think about new fundraising ideas as they come down the pike.

At the end of several chapters, you will see references to “Online Content.” These are additional, free resources that augment the information in those chapters. There is also a “Resource Section” in the Online Content, which I will be updating and adding to from time to time. For teachers or trainers using the book as a textbook, there is a free Instructor's Manual online. Directions for how to download the Online Content and the Instructor's Manual from Wiley precede this Introduction. These resources can also be found on the website of my consulting firm: www.kleinandroth.com. I encourage you to contact me through that website or at kim@kleinandroth.com with questions, comments, disagreements, and additions to the resources I have listed.

If you find this book helpful, I encourage you to buy all my books and other fundraising books in the Kim Klein series at www.Wiley.com and to subscribe to the *Grassroots Fundraising Journal*, a bi-monthly publication that will help you keep up with fundraising strategies and developments in the field.

But ultimately, after you have read about how to raise money and gone to workshops on how to do it and hired consultants to help you, the only thing left is to actually do it. As with being a player on a sports team, all the theory and explanation will not help you until you go out into the field and practice with your teammates. With focus, practice, and strategy, your team will win. Likewise, putting your energy into creating a fundraising program that everyone in the organization is a part of will enable your organization to raise the money it needs.

Few people give money without being asked. Make this your motto: “Today somebody has to ask somebody for money.”

ABOUT THE AUTHOR

Kim Klein is an internationally known fundraising trainer. She has worked in all aspects of fundraising: as staff, volunteer, board member, and consultant. She is best known for adapting traditional fundraising techniques, particularly major donor campaigns, to the needs of small-budget organizations working for social justice.

Kim is the author of five books, including this, her classic text, *Fundraising for Social Change*, now in this seventh edition. Her book *Reliable Fundraising in Unreliable Times* won the McAdam Book Award in 2010. She co-founded the *Grassroots Fundraising Journal* in 1981 and remained its publisher until 2006. She continues to write for the *Journal*, including her monthly column, “Dear Kim,” where she answers questions posed by readers. She has also written widely about the need for nonprofits to be advocates for fair and just tax policy.

In wide demand as a speaker, Kim has provided training and consultation in all fifty United States, five Canadian provinces, and twenty-two other countries. She was a lecturer at the Haas School of Business for many years and currently teaches part-time at the School of Social Welfare at the University of California Berkeley. She has been an adjunct faculty at the University of Denver and at Concordia University in Montreal.

Kim lives in Berkeley with her partner and their cat.

CONTENTS

Online Content	xiv
Acknowledgments	xv
Introduction to the 7th Edition	xvii
About The Author	xix

PART ONE	What's New, What's Hot, What's Over, What's Not	1
1	Nonprofits and the Money They Raise	3
	The Size and Scope of the Sector	4
	Where Money for Nonprofits Comes From	5
	Who Receives Charitable Giving	11
2	Creating a Fundraising Philosophy	15
3	Be Clear About What the Money Will Do	19
	What Is in the Case Statement?	19
	Why Does Your Organization Exist?	
	What Do You Most Believe?	21
	What Are Your Goals and Objectives? What Do You Do?	23
	What Have You Accomplished?	24
	Who Is Involved in This Organization and How Does It Run?	25
	How Much Does It Cost for Your Organization to Function, and Where Do You Get Your Money?	26
	Creating a Strategic Plan	27
	Developing the Case Statement	27

4	What You Have to Understand to Begin Fundraising	29
	Focus on Diversifying Donors	29
	Appeal to People Who Give	31
	Why People Give	31
	Asking People to Give Is Easy to Learn	33
5	The Importance of a Good Board of Directors	35
	The Board and Fundraising	37
	Time and Money	38
	The Role of Paid Staff	39
	Our Board Members Don't Have Any Money	39
	Common Board Problems and Suggested Solutions	40
	Moving Past Board Problems	44
	Recruiting Board Members Willing to Help with Fundraising	45
	The Orientation	47
	Advisory Boards	47
	Using Other Volunteers for Fundraising	50
<u>PART TWO Ask Them, Thank Them, Ask Them Again</u>		51
6	Financial Needs and Fundraising Strategies	53
	Annual Needs	53
	Asking Several Times a Year	54
	Attracting New Donors	55
	Capital Needs	56
	Endowment and Reserve Funds	56
	Three Goals for Every Donor	59
	Three Types of Strategies	60
	You Can't Save Time	63
7	Thank Before You Bank	65
	People Need to Be Appreciated	66
	Don't Do As I Say	67
	Do It Now	68
	Logistics and Content	68
	Sample Computer-Generated Thank-You Notes	69
	Thank-You Calls	72
	Common Questions	72
8	Getting Comfortable with Asking	75
	Why We're Afraid to Ask for Money	76
	Specific Fears	79
9	Ask a Real Prospect	83
	Ask a Prospect	83
	Steps in Creating a Prospect List	88

10	How to Ask	93
	The Most Formal Approach	94
	Sometimes You Only Need Step 1 or Step 2	94
	The E-Mail or Letter	95
	The Phone Call	96
	The Meeting	99
11	Strengthening Relationships by Creating Categories of Donors	105
	Categories	106
	Other Segments	107
	Staying in Touch with Donors	109
<u>PART THREE</u> Strategies for Acquisition and Retention		113
12	Multi-Channel Fundraising	115
13	What Successful Mass Appeals Have in Common	119
	A Good List	120
	An Understanding of the Psychology of an Appeal	123
	Test and Evaluate	125
14	Direct Mail	129
	Acquisition: Get Someone to Give for the First Time	130
	Retention: Get Donors to Repeat Their Gifts	131
	Upgrade: Ask Donors to Renew Their Gifts	133
	Using Direct Mail on a Smaller Scale	133
	Developing Lists for Direct Mail	135
	Constructing a Direct Mail Package	136
	The Direct Mail Appeal Package	136
	Benefits and Premiums	147
	Using Direct Mail to Seek Renewal Gifts	149
15	Online Fundraising	151
	Follow the Research	152
	Focus on Your Website and Building Your E-Mail List	153
	Driving Traffic to Your Site	155
	E-Mail	156
16	Using the Telephone	163
	Basic Technique of the Phone-a-Thon	164
	The Night of the Phone-a-Thon	171
	After the Phone-a-Thon	173
	Getting Publicity for Your Phone-a-Thon	174
	Other Uses of the Phone-a-Thon	175
17	Special Events	181
	Types of People Who Attend Special Events	182

Choosing a Fundraising Event	183
The Logistics of a Special Event	187
Tasks of the Committee	187
What Not to Forget	190
The Evaluation	192
18 Establishing Voluntary Fees for Service	195
What to Charge For	196
Voluntary Fees	197
Introducing the Process of Collecting Fees	200
When Service Is Provided by Phone or E-Mail	200
19 Door-to-Door and Street Canvassing	203
Advantages and Disadvantages	204
Elements Needed to Run a Canvass	204
Setting Up a Canvass	205
The Door-to-Door Canvasser's Work Day	209
Retaining Donors Acquired Through a Canvass	210
20 Opportunistic Fundraising	213
Two Weeks of Fundraising Opportunities	214
Find Your Own Opportunities	216
 PART FOUR Inviting Current Donors to Make Bigger Gifts	 219
21 Building Major Donor Programs	221
Setting a Goal	222
Deciding How Many Gifts and What Size	223
How Many People to Ask	225
Materials for Major Gift Solicitation	226
Keeping in Touch with Major Donors	228
Renewing Major Donor Gifts	230
The Hardest Year	232
22 Setting Up and Maintaining Recurring Donor Programs	235
Creating a Recurring Donor Program	236
Ongoing Promotion	240
Collecting Monthly Donations	241
Keeping Track of Recurring Donors	242
23 Legacy Giving	243
Getting Ready for a Legacy Giving Program	243
Preparing to Talk About Legacy Giving	244
The Importance of a Will	245
Motivating Donors to Make a Will	246
The Bequest	247
Gifts from Insurance and Retirement Funds	250
Introducing Your Legacy Giving Program	251

24	Setting Up an Endowment	257
	Endowment Defined	257
	Benefits of Endowments	258
	Disadvantages of Endowments	258
	Considering an Endowment or Reserve Fund	259
	The Authorization	261
 PART FIVE Using a Campaign Strategy for Raising Large Amounts of Money		267
25	What All Large Campaigns Have in Common	269
	Step 1: Set a Goal and Create a Gift Range Chart	270
	Step 2: Create the Timeline	271
	Step 3: Form a Solicitation Team	271
	Step 4: Compile and Organize the List of Prospects	272
	Step 5: Solicit the Gifts	274
26	Raising Money for Capital	277
	Best Use of Capital Campaigns	277
	Beginning a Capital Campaign	279
	Four Phases of the Campaign	282
	Post-Campaign	286
27	Endowment Campaigns	287
	Setting a Goal	288
	The Solicitation Team	289
	A Clear Case for Support	290
28	Conducting Feasibility Studies	291
	Who Conducts the Feasibility Study	291
	Whether to Do a Study	292
	What Feasibility Studies Tell You	293
	Achieving Success	294
 PART SIX Budgeting and Planning		295
29	Developing a Budget	297
	Step 1: Estimate Expenses and Income Separately	298
	Step 2: Meet, Compare, Negotiate	302
	Ongoing Monitoring	306
30	Creating a Fundraising Plan	307
	Step 1: Set a Goal	307
	Step 2: Spell Out the Details of Each Income Strategy	307
	Step 3: Plot Out Your Plans for Raising Money from Individuals	308

Step 4: Decide on Numbers of Donors and Match Them to Strategies	309
Step 5: Put the Plan onto a Timeline and Fill Out the Tasks	309
Raise, Don't Cut	315
31 The Perennial Question of Clean and Dirty Money	317
32 What to Do in Case of Financial Trouble	321
Cash Flow Problems	321
Deficit Spending	322
Serious Accounting Errors, Mismanagement of Funds, or Embezzlement	323
 PART SEVEN Fundraising Management	 325
33 Infrastructure for Fundraising	327
Guidelines	327
Watch for Time Sinks	329
Calendars	330
Action Plans	333
34 Hiring a Development Director	335
The Role of a Fundraiser or Development Director	335
The Tasks of the Fundraiser	337
Solving Your Problems	338
Paying the Development Director	339
How to Find a Capable Development Director	340
35 Using a Consultant, Coach, Mentor, or Trainer	345
Consultant	346
Trainer	346
Mentor	346
Coach	347
Working with a Consultant	347
What Fundraising Consultants Can Do	348
What Fundraising Consultants Generally Don't Do	349
How to Choose a Consultant	349
Paying Consultants	351
No Miracle Workers	351
36 Dealing with Anxiety	353
Recruit Volunteers and Delegate	353
Keep Your Priorities Clear	354
Detach from the Results of Your Work	355
Recognize That There Are External Forces Beyond Your Control	355
Take Care of Yourself	355

PART EIGHT You the Fundraiser	357
37 Know What You Need to Know	359
Information You Need for Fundraising	360
Find a Good Database	360
The Importance of Donor Records	362
Keeping Your List in Shape	363
Your Filing System	364
Sticking with It	364
38 Working with Your Executive Director	367
Developing a Good Relationship	368
On Defensiveness	371
39 Working with Volunteers	375
Invite People to Participate in Fundraising	376
Take the Time Necessary to Orient Volunteers	
to Your Fundraising Program	378
Help Each Volunteer Choose the Fundraising Strategies	
He or She Will Feel Most Comfortable Using	379
Remember That Good Enough Is Good Enough	380
Show Genuine and Frequent Appreciation	380
Give Volunteers Time Off	380
40 When You Encounter Ethical Dilemmas	383
Three Moral Dilemmas	384
Three Tools	385
 PART NINE Special Circumstances	 389
41 Raising Money in Rural Communities	393
The Many Definitions of <i>Rural</i>	393
Raising the Money You Need in a Rural Community	396
Prospects	398
Strategies for Raising Money	400
Conclusion	402
42 Fundraising for a Coalition	403
Examine the Problem	404
Some Solutions	405
43 When No One Is Paid	409
Effective Orientation of New Volunteers	411
Finding Volunteers	412
44 When You Are Just Starting Out	415
Index	419