



HASS Resource: Philanthropy Toolkit - Development & Fundraising

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What is philanthropy?

[Philanthropy](#) is an active effort to promote welfare through an act or gift done or made for humanitarian purposes, especially by the generous donation of money to good causes.

For animal welfare, philanthropy drives our missions forward and brings ideas from concept to reality. Philanthropy supports the mission of our organizations through education and engagement.

What are development and fundraising?

Development is the work between fundraising and philanthropy. Development departments, staff, or volunteers, assess an organization's needs and determine how best to create and operate a plan that meets an organization's revenue objectives.

Fundraising is the solicitation of donations or revenue as directed by a development plan. Fundraising is the activity to secure donations from the general public.

What problems are philanthropy, development, and fundraising trying to solve?

Animal welfare organizations will often struggle to identify sustainable funding to support their missions.

Animal welfare funding is needed to:

- Support animal care
- Support staffing needs
- Construct new facilities
- Start and sustain programs
- Establish reserves or endowments that ensure the long-term viability of an organization

Philanthropy transforms our operations and allows us to meet the enormous needs of animals and people in our communities.

Benefits of a development program

- Improve customer satisfaction
- Build community engagement
- Grow volunteer support
- Improve morale within the shelter
- Increase marketing and media engagement
- Increase fundraising
- Keep more people and animals together



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- Save more animal lives
- Increase adoption and/or rescue placement
- Increase the number of animals returned home
- Improve care in the shelter
- Learn more about animals in your care
- Promote pet ownership
- Increase public safety
- Promote diversity, equity, and inclusion
- Support human health and wellness
- Support environmental health and sustainability

How do I start building a philanthropy program?

Step 1: Culture of Philanthropy

Definition: A *Culture of Philanthropy* is established when an organization understands and embraces the role that every staff member plays in building an environment that maximizes philanthropic and fundraising support.

A culture of philanthropy doesn't mean that everyone needs to solicit funds. Instead, everyone acts as an ambassador to build relationships that are essential to philanthropic success!

A culture of philanthropy ensures that all staff are positioned to effectively promote philanthropy and can articulate a case for support, and they understand the role philanthropy plays to fulfill the organization's mission.

What does this solve: A Culture of Philanthropy ensures that the fundraising operation is not siloed and is effectively integrated into the organization. It shifts the mindset of the organization to understand that philanthropic success is based on the collective success of the organization, and not just the "fundraising" team. It relies on the strength of your programs, the expertise of your staff, exceptional customer service, and your marketing/communications efforts. When these come together, the organization moves from merely thinking about how to raise more money, to understanding how to effectively marshall the organization's collective strengths in support of your mission.

How to build a culture of philanthropy:



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Staff are introduced to the idea of the culture of philanthropy and their role in it throughout the onboarding process and within their first weeks on the job and explained how this fits into their role in the organization.

Relationship between the CEO and CPO: Chief Philanthropy Officer (lead fundraising position) has an effective and collaborative working partnership with the CEO/Executive Director. They should have a shared vision for short and long-term philanthropic initiatives. On a practical level, there should be consistent interaction between CPO/CEO. These will include weekly meetings to discuss priorities. Weekly meeting agendas should include cultivation/stewardship needs from the CEO, current initiatives/campaigns briefings, individual donor discussions.

CoP is included in every job description. Philanthropy is viewed as a component of everyone's job. Everyone has a role and their role is clearly communicated in each job description. Staff may be ambassadors, connectors, cultivators, solicitors, and/or stewards.

Philanthropy successes are shared regularly with staff and volunteers. The people in your organization need to hear and see how development efforts are paying off and how this positively impacts the organization.

Program staff have protocols on how to communicate animal success stories. They share these regularly with marketing and communications and philanthropy teams.

The organization builds a connection between communications and development.

Communications staff are integrated into department meetings and communication channels (WhatsApp) as appropriate.

Donors are viewed as critical partners and valued for the contributions they provide by all staff.

In the top-performing fundraising organizations:

- Philanthropy staff provide monthly updates on restricted gifts to programmatic leads for acknowledgment.
- Program staff are trained on how to interact with donors when donor tours are taking place.
- CEO and other programmatic leadership participate in donor cultivation/stewardship activities like signing thank you letters and appearing in gratitude videos.

Technology:

- [Donor Management](#)
- [Fundraising Tools](#)



- [Customer Service Tools](#)
- [Online Marketing Tools](#)
- [Communications Tools](#)
- [Crowdsourcing Tools](#)

Examples:

- [SDHS 2021 Day of Giving](#)

Resources:

- [Underdeveloped: A National Study of Challenges Facing Nonprofit Fundraising](#)
- [Fundraising Matters \(Blackbaud\) - Building a Culture of Philanthropy](#)

Step 2: Strategy

Definition: A plan of action designed to create a path to achieving a goal.

What does this solve: Shines a light on a path and guides where to focus efforts, and be proactive towards reaching your goals.

Where to start: Take time to review your development activities from the previous year. Ask the following questions:

1. What worked well that we should continue doing?
2. What didn't work well that we should stop doing?
3. What new ideas should we start doing?

This information can help avoid making the same unproductive efforts over time. It may be helpful to review the success of efforts before any major campaign on your development plan.

Create quantifiable goals to measure against previous goals.

- Example: Raise \$1,000,000; Recruit 500 donors; Build a monthly giving program to 500 donors. [SMART](#) goals are Specific, Measurable, Attainable, Relevant, and Timely.

Tactics: List activities to accomplish this year that will impact goals. Then, list the major steps to execute to complete the activity. Don't forget to evaluate each activity to make adjustments going forward.

What donors are you trying to reach? Use this [donor pyramid](#) to answer this question.



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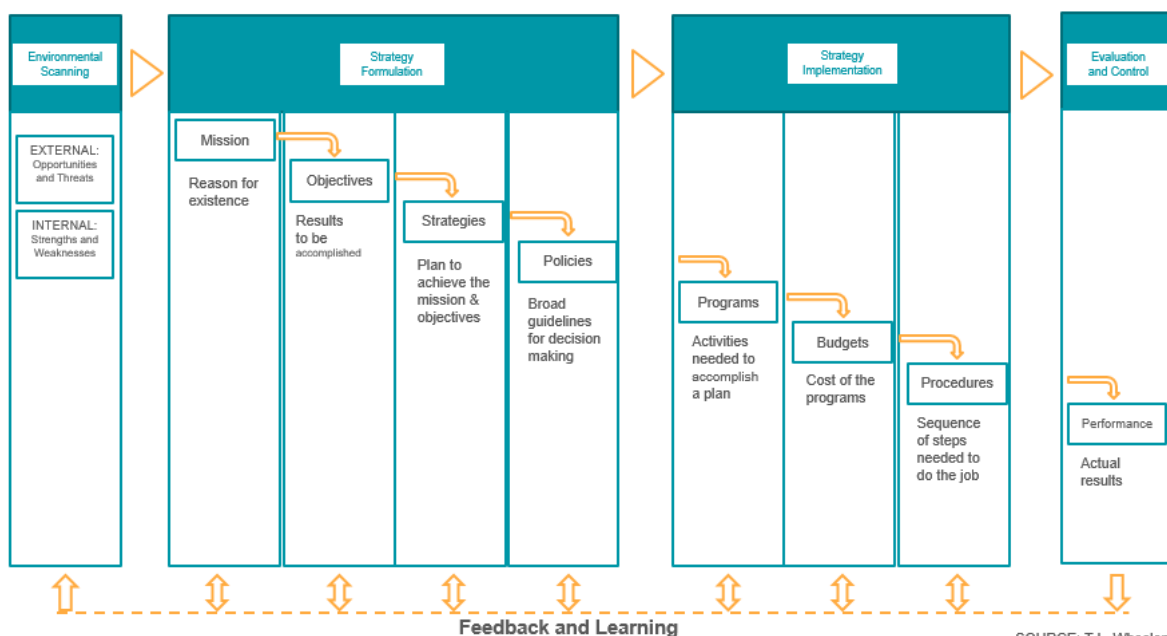
Identify your timeline: Grab a calendar and begin to plot the major steps.

- For each step, include:
 - WHAT: What is going to happen?
 - WHO: Who is responsible for executing and WHO is the main audience
 - WHEN: What time of day?
 - WHERE: Where will this take place?
 - HOW: How will you reach your audience?
 - WHY: why are you willing to spend resources to execute this work?

Long-Term Goals:

As defined by T.L. Wheelen, strategic management is a set of decisions and actions that determines the long-run performance of an organization. Research reveals that organizations that engage in developing a strategic plan generally out-perform those that do not. Strategic planning becomes increasingly important as the environment becomes more unstable.

Wheelen developed a strategic planning model that helps organizations recognize the interconnectedness of each step as the organization evolves. This model can be used for the entire organization, or for your philanthropic efforts. Example:



- Environmental Scanning: A review of internal and external data. This step is a scan of your environment, both inside your organization and outside your organization. Consider using a [SWOT \(Strengths, Weaknesses, Opportunities, Threats\) model](#) to define the internal and



external forces for philanthropy in your organization. As you move forward, you need to consider how these forces

- **Strategy Formation:**
 - Strategy formulation is the development of long-range plans for the effective management of the environmental opportunities and threats and in light of corporate strengths and weaknesses.
 - The four parts of this element include:
 - Mission: The purpose or reason for existence
 - Objectives: The end results of planned activity. They are action verbs that tell what is to be accomplished.
 - Strategy: A master plan that states how you will achieve your mission and objectives.
 - Policy: Guideline for decision making to ensure that decisions and actions support the mission, objectives, and strategies.
- **Strategy Implementation:**
 - Strategy implementation is a process by which strategies and policies are put into action through the development of programs, budgets, and procedures.
 - In contrast to the previous element, the three steps in this section should be reviewed and changed regularly, but not constantly. Once you've created the plan, stick to the plan.
 - The three parts of this element include:
 - Programs: In reflection to our objectives, and in service of our mission, programs are the campaigns and activities we host.
 - Budget: The budget needs to reflect the resources needed to execute the programs.
 - Procedures: In the most extreme situation, procedures are extensive project management activities. In the most simplistic situation, procedures are your TO DO lists and tactical timeline.
- **Evaluation and Control: Results of performance**
 - Performance is the end result of activity. And the evaluation and control process ensure that you are achieving what it set out to accomplish. It compares performance with desired results and provides the feedback necessary to evaluate results and take corrective action, as needed. This is where we determine what we will track, how we will track it, who is responsible for tracking, and our process for shifting when the tracked results do not meet and/or exceed expectations.
- **Feedback and Learning:**
 - Based on your evaluation of your performance, you may need to shift your elements accordingly.

Example:

Pima Animal Care Center's COVID Response: Social media and email blitz paired with an urgent press release led to a record number of pets being fostered. Kennel space opened in preparation



for pets with hospitalized, deceased, or evicted owners. [This blog](#) outlines the outcome of the strategy.

Resources:

- [Strategic Planning Overview and AWLA Overview document](#)
- [Community Centric Fundraising](#)
- Technology:
 - [Fundraising Tools](#)
 - [Online Marketing Tools](#)
 - [Communications Tools](#)
 - [Customer Service Tools](#)

Step 3: Branding

Definition: Your organization's brand is its identity and personal style across all design and messaging efforts. Brand includes, but is not limited to, logo design, colors, fonts, word choice, writing style, and customer service.

What does this solve: Having a definitive and consistent brand for your organization does four important things:

- **Communicates your mission, vision, and values:** A strongly defined and consistent brand is an important part of inviting the community to be a part of the who, what, and why of what you're doing.
- **Creates a unique identity:** Good branding makes your organization recognizable and distinct from others. We all know there is no shortage of shelters, rescue groups, etc. What makes you stand out?
- **Fosters attraction and credibility:** An engaging and consistent brand lends your organization credibility (trust is key!) and professionalism. It can elevate and extend your reach to new audiences.
- **Builds familiarity:** A successful brand gives existing stakeholders something recognizable with which to identify themselves. Everyone loves good swag (promotional products), too!

Step Details: Refresh familiarity with your organization's mission, vision, and values statements. If these don't yet exist or they need some work, work on solidifying these. There are lots of online resources and consultants to support your organization in the creation of these critical statements.



- **Start-Up:**
 - **Branding Audit:** Once you feel secure in your mission, vision, and value statements, start branding efforts by doing an audit of the existing brand. Go through each of the following categories and make note of everything that catches your eye whether pleasing or troubling.
 - **Logo:** Does your organization have a logo?
 - If not, it's time to hire a graphic designer—it may be worth paying a professional. If you already have a logo, ask yourself and your team if you're happy with it.
 - Do the colors, fonts, and/or mascot design styles communicate your organization's personality and values?
 - Is it distinguishable from other organizations' logos?
 - If you don't love your logo, it may be time for a refresh or complete redesign.
 - **Website:** Have staff or volunteers look through every page on your website, especially your homepage.
 - What image(s) and text appear above the fold (what can you see without scrolling down) on mobile, desktop, tablet, etc. Do the image(s) and text pass the ["blink test"](#)?
 - It only takes a few seconds for visitors (aka potential donors!) to judge an organization by its website.
 - Example: Can you tell [who this is and what they do](#) just by glancing at their website?
 - **Social Media:** Review each one of the social media platforms your organization uses.
 - For example, if your organization uses Facebook, Twitter, and Instagram, look at every aspect of your organization's presence on each platform.
 - Are you using the same up-to-date logo on every account?
 - Do the images you share tell the story you need them to?
 - Is the language in your posts too formal or informal?
 - Are words being used that might not align with your organization's mission such as "cage" instead of "kennel"?
 - **Email:** This includes both the signatures your team uses on their emails and all elements of the mass emails your organization sends out.
 - What templates do you use in your mass emails?
 - Do you always use the same design regardless of the content you're sending? This is another area where you may want to pay a professional to create a few branded templates.



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- For example, you may have one for a monthly e-newsletter, one for emergency funding requests, and another for welcoming new donors or acknowledging their giving (or adoption!) anniversary.
- **Print Materials:** Take some time to gather all of the print materials in use at your organization: business cards, brochures, remit envelopes, print newsletters, etc.
 - Are the colors, fonts, logos, and image styles similar?
 - What do they communicate to the viewer?
- **Merchandise:** If your organization sells merchandise, does it reflect your brand? Are the colors just right? Is the quality of the material great? Does it reflect the most up-to-date logo? If not, consider having a fire-sale and invest in some new goods!
- **Miscellaneous:** Depending on your organization there may be other areas that branding impacts like the logo embroidered on the mandatory staff polos/hats or the paint scheme in the shelter's lobby.
- **Short-Term Goals:**
 - **Complete Messaging Worksheet:** After you've completed your audit, sit down with the [HASS Messaging Guidelines Worksheet](#). Work through these questions to help you clarify and build the foundation of your brand. Have leadership and other staff members complete this sheet for inspiration.
 - **Establish Visual Guidelines:** Decide on the main colors, fonts, and type of photos to use to make your organization shine! Communicate these requirements to all staff, volunteers, board members, contractors, etc. via email, print-out, or whichever medium will have the most impact.
 - **Logo:** Invest in professional graphic design for the creation of a new logo. Be sure to get the final artwork from your designer and request multiple file types such as .png, .jpg, .pdf, and .ai, as well as logo variations such as all white, all black, inline, and stacked. Now is also the time to choose your color scheme. You'll want your logo to match and/or compliment all of your other materials.
- **Long-Term Goals:**
 - **Style Guide:** Work with an in-house graphic designer or hire a consultant to create a visual branding and style guide, and implement the guidelines across all of your marketing collateral (print, digital, web).
 - Example: [This excellent one](#) from Austin Pets Alive!
 - **Press Kit:** You may also want to expand this into a full press kit
 - Example: [This robust one](#) from Friends of Pima Animal Care Center.
 - **Training:** Train every staff member and volunteer in the importance of branding and ensure everyone has access to these guidelines.



- **Roll Out:** Wow! You've done a lot of great work to get to this step. Now that you know every aspect of your organization's branding, it's time to go back to all of those items in your audit and make the stars align. We recommend revamping in this order:
 - **Staff Gear:** If staff or volunteers wear branded clothing consider starting here. Order new hats, shirts, etc. for everyone. This makes branding fun and incentivizes the staff and volunteers to get on board with the wider branding updates.
 - **Website:** Go through every part of your website and update colors, design, etc. to match your brand. You may need professional help with this part if you're using a custom code or don't have web design knowledge on staff. It's worth investing in--your website is your digital front door!
 - **Social Media:** Update all cover/header images, avatars, etc. to match your new logo and colors. Once your website is up to date with branding, you can create fun social media posts celebrating your new brand and drive traffic to your website!
 - **Email:** [Check out building and keeping a brand identity through emails here.](#)
 - **Merchandise:** Revise these items at any time, but once you have your new guidelines don't order more stock of the old designs. Strategize for engaging ways to roll out the new merchandise.
 - **Print Materials:** Make a list prioritizing the print materials you need to update. Start with what is most frequently used, such as a brochure or adoption application, and end with what may be used less often, like business cards. You know your organization best.

Examples of great branding:

- [Better Together Animal Alliance](#) - Excellent video explaining a great new name to stakeholders.
- [Human Animal Support Services \(HASS\)](#)
- [American Pets Alive!](#)
- [BARCS](#)
- [Best Friends Animal Society](#) has an unmistakable brand. Their color scheme, logo, and slogan (Save Them All) communicates their personality and their mission. All of their efforts are framed in this distinct and consistent branding.

Resources:

- [Technology:](#)



- HASS Technology Catalog
 - [Online Marketing Tools](#)
 - [Communications Tools](#)
 - [Customer Service Tools](#)
 - [Fundraising Tools](#)
- [HubSpot Academy](#): Mostly free branding resources for every level of interest.
- [Canva](#): A premium account is FREE for nonprofits and can make branding for social media and print documents a snap.
- [Catchafire](#): Pay a small fee for a monthly or annual license and have virtually unlimited access to professional volunteers from web developers to graphic designers and more.

Step 4: Storytelling

Definition: Sharing stories from your organization's experiences and efforts to relay information to supporters while building emotional connectivity. An organization can convey its mission and values through storytelling, build trust through transparency and encourage a collective mindset and buy-in from the community. Stories are a powerful and motivating means of communication that inspire donors to give and/or show donors that their actions are making a difference.

What does this solve: Storytelling is the strongest way to make an emotional connection between donors and an organization. Effective storytelling inspires donors to give. Stories can demonstrate the impact an organization makes or the support they may need and result in donors taking action to benefit the cause. The objective of storytelling is to influence how people think, feel, and behave. More importantly, it can influence how they support your organization and lifesaving work.

Step Details: Animal welfare organizations have compelling reasons for stories every day. The purpose of each story can be written to elicit a certain response and call to action. What stories can you tell about the work your nonprofit does that will paint a vivid picture in your readers' minds and motivate them to get involved with your organization?

- **Start-Up:** Your story should be about how your nonprofit changes lives. It should include who you help, and most importantly, *why you do it*.
 - If someone asks you why you put so much work and energy into your organization, this is the story that answers that question. Think of an example of how your organization has impacted an animal positively. Now decide what kind of intent you want your story to have on your audience.



- Do you want to convey the need for donations to continue having this type of impact on animals?
 - Do you want to highlight the passion and commitment of your organization?
 - Do you want to compel your audience to act through an emotional connection?
 - What action do you want your audience to take as a result of this story?
- How you relay your story should have the goal of fulfilling these questions and propel your audience to act, be inspired, and connect. There are many ways to communicate your story. Use photography, video, writing, or a combination to paint a compelling picture in the viewer's mind.
- **Short-Term Goals:** Everyone loves a good transformation story and this is a great short-term goal. Find before and after photos/videos to compliment the story to have the greatest impact. A great way to assess the impact of your story is to post it on social media and track audience comments to determine if the reaction was what you intended.
 - Start with describing where the animal came from and the shape it was in.
 - Outline the impact that your organization's staff and volunteers had on transforming the animal from a medical, emotional, and physical perspective.
 - A happy ending for the animal is the culmination of your organization's hard work and will leave the reader motivated to get involved.
 - Be clear and succinct, stay away from facts and figures.
- **Long-Term Goals:** Begin to collect stories and follow up with adopters to obtain current photos and status of animals who had memorable stories. Include storytelling in every form of communication and medium including newsletters, digital media, direct mail, news stories, social media.

Resources:

- **Storytelling:**
 - Storytelling for Better Fundraising - Rachael Muir - [YouTube Video Webinar](#)
 - Digital Storytelling - [ASPCA Webinar](#)
 - A Magical Social Media Journey - [ASPCA Webinar](#)
 - The Chronicle of Philanthropy - [Storytelling Articles and Resources](#)
- **Technology:**
 - Easy Video Creation and Editing - [Magisto](#)

Examples:



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- The Dodo - <https://www.thedodo.com/>
- 6 Amazing Stories from Best Friends Network Partners - [Blog](#)
- Southern Pines Animal Shelter (See Below):



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SOUTHERN PINES ANIMAL SHELTER



Dear Sandy,

Even when the odds seem too terrible to overcome, we believe in second chances.

Today an emaciated little dog sits quietly in the lap of a staff member, safe and loved, while one of our medical team gently cleans and bandages one of her tiny, mutilated legs. Every so often the pup, who we named Imogen, slowly lifts her head and reaches up to give soft, little kisses to the person holding her. Though initially very frightened and anxious, Imogen quickly settles, seeming to realize that she's finally found a safe haven where she can rest and heal.



We don't know what terrible series of events left Imogen so broken, but what we do know, is that with your help, she's got a fighting chance at the future she deserves.

For tonight Imogen is safe, comfortable and her immediate needs are being cared for. However, her wounds are many; they are deep, raw, and smell of terrible infection. We are not sure how far the infection has spread, and we are also not sure if her tiny, broken, malnourished body is up to the challenge of fighting off an infection this severe. She is extremely dehydrated, covered in fleas, and our veterinarian suspects that at least two of her legs are broken. But Imogen's not ready to give up and neither are we.

Imogen needs a hero. Can she count on you?



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Your donation today will help us get Imogen the testing and X-rays she needs to determine the severity of her infection and her fractures, and what steps we need to take next to save her life. While this first vet visit will cost about \$200, it is very likely that Imogen's care, treatment and recovery may total over \$1,000 when all is said and done.

Please consider donating to day to help this sweet pup--and other dogs like her--get the treatment she needs so she can find the forever home she deserves.

Make a difference today!

Together we can be the difference for dogs like Imogen, and together we can rewrite stories for homeless and hurting.

Warm Regards,

Ginny Sims
Executive Director, Southern Pines Animal Shelter

Step 5: Donation Management Technology

Definition: Tools to be used to solicit, cultivate, and steward donors, as well as track and record and solicitation, cultivation, and stewardship of donors. Technology can provide wealth screening to help guide donor identification and strategy.

What does this solve: Encourages ease of donation and improves donor relations by facilitating and recording communications amongst team members. Having a clearly defined donation pathway ensures each donation is received, recorded, funds used appropriately, and the donor is thanked.

Step Details:

- **Start-Up:** If you do not have a fully capable CRM, start with setting up a PayPal account instead to allow donations on your website. This will allow you to begin building a list of donors.



- Make sure the donation button lives on your home page and that all donor names and contact information (especially email addresses) are being collected in a spreadsheet for future requests, emails, and moving over to your CRM once purchased.
- **Short-Term Goals:** Research and find a database (CRM) that works within your budget. This will allow you to understand your fundraising trends as well as track and acknowledge your donors.
- **Long-Term Goals:** Utilize the information and analytics you collect from your CRM to create a philanthropy strategy. This can help you understand the best times to make requests as well as scaling your donor growth.

Examples:

- CRM, website, donation pathway
- [Little Green Light](#)
- [Salesforce](#)
- [Classy](#)
- [Salsa](#)
- [HASS Technology Catalog](#) - Crowdfunding platforms

Resources:

- Tech Soup - [Picking a donor management tool](#)
- Candid Blog - [Fundamental Donor Management Tips](#)

Step 6: Tactics

Tactic A: Social Media Fundraising

Definition: Engage your social media audiences to mobilize direct giving through the platforms they use daily.

- **Considerations:** It's easy to feel overwhelmed by social media. Keep quality over quantity in mind and choose only one to three social media platforms that you and your team have the capacity to maintain well. For example, it's better to have no Twitter account than to have one and never use it.

What does this solve: Provides the ability to give via social media channels increases the chances of capitalizing on an immediate emotional impulse and meets your donors where they are.



Step Details:

- **How to Choose Your Platforms:**

- Audit your organization's existing social media accounts.
 - Are they active according to industry best practices?
 - Where are you seeing the most engagement?
 - Which platform is most realistic for your team to maintain based on their capacity?
- Choose one to three platforms and get comfortable and consistent with those before branching into the latest and greatest trending platform.
- See the resource links below for [free educational tools](#) to expand your knowledge of all things digital marketing.

Beginner:

- Facebook
 - To get started with Facebook fundraising, register your organization through the [Facebook nonprofit partners portal](#). Once accepted, it's important to evaluate your settings and adjust them according to what is best for your organization. We suggest toggling on for all ways of giving/raising. This includes adding buttons to your page's posts and stories; the ability to collect donations through a connected Instagram account; as well as allowing supporters to make their birthday (or other occasions) fundraisers on your behalf and add buttons to their posts to collect donations for your organization.
 - Understanding Facebook's donor reporting is important to properly communicating with your supporters who choose to give through social platforms. Facebook does **not** provide nonprofits with comprehensive donor information on their reporting. You will always get transaction amounts, but sharing names and email addresses are at the discretion of the donor. Facebook directly supplies donors with a receipt for their gift. It's not uncommon that donors will be confused by this process, which is why communication through comments is very important. When someone sets up a birthday fundraiser or adds a "give" button to their post, use the comment function to both appreciate their gift and explain the process. We suggest saving versions of a message like this to use whenever someone communicates that they have given a gift to you through Facebook. This will help lessen the number of donors who feel unappreciated by your inability to communicate directly with them through traditional methods about their gift.
 - **Example:** *Thank you so much for choosing BARCS for your fundraiser! We are so lucky to have amazing people like you helping us care for the animals at our shelter. Every dollar you raise will feed a meal to a dog or*



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*cat at our shelter. As a high-volume, open-admission shelter, BARCS welcomes all animals in need into our safe haven. We couldn't save lives without awesome supporters like you. So thank you, and Happy Birthday! **Please note**, Facebook does not supply donor contact information to our organization. All donation receipts are sent directly from Facebook. If you have any questions about the donation process through Facebook, you can email our team at give@barcs.org.*

Intermediate:

- Facebook: Now that you're collecting gifts through birthday fundraisers and supporter-created donation buttons, it's time to start including Facebook donations in your fundraising campaign plan.
- Tips for Engaging Facebook Fundraising Posts:
 - Just like with posts, the social media audience responds best to fundraising pleas with a real-time message. A post to help a dog in your care right this minute will always perform more favorably than a post about a dog who was already helped and since adopted.
 - Consider bringing emergency cases directly to your Facebook audience. If your organization already does emergency fundraising (likely through email/text) for specific animals/cases, Facebook should act as an additional platform for the story. Facebook can even be the best tool to begin your campaign with, as a way to gauge if your audience is connecting to the story and taking action.
 - Get used to your supporters seeing how much money you've raised and don't turn off your giving buttons. Facebook shows to everyone exactly how much money you've raised. The old notion that "once you've reached the goal the fundraising will slow" doesn't apply to Facebook donors if your story is compelling. It's not uncommon to see giving far surpass your goal/need on Facebook. Turning off your donation buttons will only leave supporters without a way to act on what is pulling their hearts.
 - Choose photos over graphics. When including Facebook fundraising as part of a bigger campaign, abandon your coordinating graphics. Not only does the Facebook algorithm stifle graphics, but it removes the "real-time" experience for your followers.

Advanced:

- Boosting posts and running paid ads for donations is an advanced step to raising funds via social media. Paid promotion can help push your appeal/posts to those who like your page and/or targeted audience (with the goal of new donor acquisition). This model is pay-to-play. If you are investing in ads, your message needs to be compelling.



- **Boosting posts:** It's best practice to boost a post that is already getting traction. While this may seem counterproductive, there is good reason to consider a post's organic reach before boosting it: Is the message resonating with your supporters? If the post is already making a splash, boosting it will only help you reach more people who are likely to feel the same.
- **Paid advertising:** Setting up Facebook Ads is more in-depth than simply boosting a post, but if you have the knowledge within your team, and the ability on your donor CRM to track interactions and donations, this can be a valuable and measurable tool to raise money year-round.
 - The benefit of paid advertising for donations is that it's a mostly hands-off process that allows you to passively reach and ask donors all year long. Organizations can designate their donate button to have people give through Facebook or directed to give on your CRM (via your website).

Resources:

- [HASS Technology Catalog](#)
 - [Online Marketing Tools](#)
 - [Communications Tools](#)
 - [Crowdsourcing Tools](#)
 - [Customer Service Tools](#)
 - [Fundraising Tools](#)
- [HubSpot Academy - Friendly, free trainings and certifications in all things marketing](#)

Examples:

- [Best Friends Animal Society \(Facebook\)](#)
- Intermediate: [BARCS Animal Shelter's emergency plea for Donut](#)
- Advanced (Paid Advertising) Example: Animal Rescue League of Iowa
"[ARLI will] raise over \$220K on Facebook this year directly through the platform and our \$60K annual spend in ads will result in an additional \$240K through web gifts that we can directly track back to those ads. We have done some paid event promos for \$1-2K but they're not nearly as beneficial as the direct fundraising ones are." Their CRM is Luminate,



for reference.



Tactic B: Email Fundraising

Definition: Send emails directly to your audience(s) on a mass scale in that if they are used for solicitation, then they **MUST** also be used for cultivation and stewardship. Tonality matters in this channel (Tone should always be conversational). Email is a great digital channel for relationship-building with people. What's more, because you can quickly get emails out to your constituency, it's a great channel to be topical and relevant, which can help to meet donors where and when they are as well as how they might be feeling at any given moment in time.

- **Example:** A nonprofit operating in Colorado has a big portion of their email file in Texas and is planning to send an email appeal. Currently, Texas is experiencing a crisis due to extreme weather. It would be wise to not send the appeal to residents of Texas, and instead, send a stewardship email that asks how they're doing, emphasizes the nonprofit's concern for its supporters, and reminds them how thankful the nonprofit is for their previous support, especially now when those same supporters experience hardship.

What does this solve:

- Reaches large groups of people (Social media is only seen by a fraction of your audience!)
- Cost-effective
- Can complement your direct mail program if done effectively
- Quick to turn around
- Measurable, when you have the applicable technology
- Ability to segment and target donors with messages meaningful to them

Step Details:



- **Startup:**
 - Clean up your data (ex: Dear jane, v. Dear Jane,)
 - Choose a platform to send emails that best suits your org
 - Note: Many organizations outsource this service
 - Learn as much as you can about your audience
 - Build consistent donation forms
 - Map out your fundraising campaigns
 - Segment your audience. This allows you to:
 - Send the best possible message at the best time and place
 - Measure performance among different cohorts
 - Automate best practices
 - Test tactics within a like audience to inform future decision making
 - Suppress people appropriately
 - Move donors through their lifecycle and drive the highest possible LTV
 - Design your fundraising emails
 - Optimize your website
 - Tell a story
 - Offer resources to get involved
 - Strategically time your emails
 - Follow up regularly

Short term goals:

- Create a sustainer gift program
- Mobile optimization
 - 50% of all online gifts are made on people's phones or tablets. Make sure your donation form renders as intended on mobile devices as well as your email.
- Develop a welcome series, sometimes known as a nurture sequence
 - A welcome series provides a unique opportunity to build upon the excitement and energy of a person who takes the action of signing on to an organization's email list.
 - Why a welcome series is important:
 - The average open rate for a welcome email is 50%. That makes it 86% more effective than standard newsletters.
 - 76% of people expect to receive a welcome email immediately after subscribing to your list.
 - Users who receive a welcome email demonstrate 33% more engagement with your outreach.
 - On average, sending a series of welcome emails yields 51% more revenue than a single welcome email.
- Fine-tune your email writing excellence
 - Put the urgency front-and-center. Remember, your donors are not yours alone. They could be on your competitors' email lists and likely have many other causes close to their hearts. Be clear in why they must give to this campaign urgently.



- Think about topics. Avoid fundraising on vague pretenses. Even if you are raising unrestricted funds, tell your donors the type of vital work their gift can fund—and might hang in the balance without donor support.
- Consider tactics. What you say is as important as how you say it. Consider how to deliver your message. Think matching gift challenges, public deadlines, and goals. Think listicles, “supporter record” cards, and infographics. Ask yourself, “Does my message pop?” If the answer is no, go back to the drawing board.
- Make the donor your hero. Your donors need to know that you rely on their support and deeply appreciate their dedication. They are what turns your mission into action. Make sure they know it!
- One ask per email. Every link in your fundraising message should drive to the same place: a donate page. This isn’t the newsletter to educate them, cultivate them, ask them to take an advocacy action, or invite them to share feedback. All clicks should point them in a single direction: Give now.
- Cut to your first ask quickly. Think of the email as the famous inverted news pyramid: Share your most compelling argument first, then cut to the ask. Then, keep building your case with your second-best argument, then cut to the next ask. Use at least 2-3 Calls to Action per email and remember to cut to the chase! Within three paragraphs, you should build a case for support and pivot to your first direct ask.
- Use declarative calls to action, Yes, we want to be polite, and in our daily lives, we should be! But when it comes to email fundraising, people respond to a firm, direct ask. Instead of saying “Please consider a gift today,” say “Progress lies in your hands. Don’t let us fall short. Give now.”
- Make decisions based on measuring your data. There are three types:
 - Financial/Accounting
 - Donation Forms/Campaigns
 - Funds/Designation
 - Donor History
 - Performance Measurement
 - Emails: Deliveries, opens, clicks, gifts, and unsubscribes
 - Ads: Spend amount, views, clicks, gifts
 - Social Media: Views, reactions, comments, shares, gifts
 - Web properties: Referral source, views, clicks, gifts
 - Behavior Measurement
 - Content view duration
 - Referral source
 - Time since last gift
 - Time on file
 - Recency of opened email
 - Donor Retention
 - Gift Count

Long-term goals: This current climate has taught us a thing or two about email fundraising -- it is more important than ever. Do not stop fundraising!



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- Expand further thinking on tonality and transparency.
- Focus on the mission.
- Target your audience with ads.
- Apply hyper-segmentation strategies with unique asks.
 - Monthly donors
 - Multi-year donors v. First-year donors
 - Board members
 - Volunteers
 - Mid-Level donors
 - Active v. Lapsed
- Lead with empathy
- Rethink your case for support
 - Are you directly responding to the crisis? How?
 - If not, how has your organization addressed continuity of services? What are the increased costs?
 - Will there be a budget shortfall, and if so, how will that affect your mission and specific program outcomes?
 - How critical is your mission now? What or who is at risk?
 - Why is it important that your organization be sustained beyond this crisis, specifically?
- Hyperfocus on donor stewardship, especially new donors
 - Get to know them – Call them!
 - Create loyalty – Call them!
- Automated series for welcome, campaigns, programs participants (monthly donors club, legacy giving club, etc), peer-to-peer event fundraising, or other link-triggered behavior
- Tracking contact list moves
 - Examples: Turning an adopter into an online donor; turning a one-time donor into a recurring donor

Resources:

- Examples:
 - [M+R Benchmarks 2021](#)
 - [How to write the perfect fundraising email example blog](#)
 - [Nonprofit Marketing Services Blog](#)
 - [Nonprofit Fundraising Optimization Resources](#)
 - [Subjectline.com](#) - Subject line examples
 - [New Customer Acquisition and Data Services - Examples](#)
 - [HubSpot: Free Email Marketing Certification Course](#)
 - [Case Study / Blog: Fundraising Strategy: Acquire, Cultivate, Convert, Acknowledge](#)
- Technology:
 - [Salesforce marketing cloud](#)
 - [Constant Contact \(Note: Doesn't track by appeal code\)](#)
 - [Mailchimp](#)
 - [Luminate Online](#)



- [Classy](#)
- [Donor Perfect](#)

Tactic C: Events

Definition: A planned online, public, or social occasion to raise money for your organization and further community connections.

Considerations:

- Events are not always the best way for an organization to raise money, as they can be very labor-intensive, and depending on the type of event, there are financial risks and often high expenses. Events do not always yield a sustaining, long-term relationship with donors. They can, however, help to attract new people to the organization.
- Consider why your organization would like to host an event. Events can help bring in revenue, but sometimes the “feel good” aspect is just as valuable if it introduces new people to your organization. Events can also be a great way to empower volunteers and committees. Because events can be very labor-intensive, leveraging volunteer time and resources can help with the planning and execution of your events.
 - Events may serve several purposes for your organization. For instance, your organization may offer training and seminars to educate adopters on things such as training, pet care, etc.
 - It is up to your organization as to whether to make these free to the public or charge a small fee.
 - Some events may not raise a lot of money on their own, but if you tie in peer-to-peer fundraising, you can greatly increase your revenue. See [Tactic K: Other programs](#) for more info on peer-to-peer.
- It is also important to consider how to follow up on any event that you hold. For example, what steps will you take if you hold a Walk for Animals to engage those participants and work to transition them to becoming a consistent donor without the event? Just as you have a plan on how to hold an event, you should also have a plan on how to follow up on the event to ensure the time and resources that have been expended are optimized.
- Consider how events may be reconfigured into virtual events if necessary in the event of an organization being unable to offer in-person opportunities.
-

What does this solve: Events not only raise money for your organization, but they attract new supporters and partnerships and bring increased engagement and awareness to the organization. Many of your supporters may be initially introduced to your organization via an event. Events can



also be used to steward a current donor if they are prime for upgrading. A positive experience may then lead them to learn more about your organization and become a recurring supporter.

Step Details:

- **Beginner:** Online raffles
- **Intermediate:** Virtual bingo, trivia, etc. / online peer to peer events, stewardship events
- **Advanced:** Virtual walks/runs/Galas/Salon events (small events with a specific focus), introductory lunches

Examples:

- **Online auction** - ask volunteers to collect auction items from local businesses.
 - A simple auction can be run on Facebook or there are more complex platforms (fees involved) in which you can set up a bidding site, send out email blasts, etc.
 - Payments can be run through [PayPal](#) if the organization does not have a payment processor.
- **Simple events like bingo and trivia** can also be held online.
 - Facebook and Zoom both have free options. The paid version of Zoom is best for this as it can provide more control (video sharing, muting, chat management, etc) and the free version has limitations.
 - If the organization can accept online payments, set up the ticketing system that way, otherwise PayPal will suffice.
- HRA's [Bark Ball Reimagined from 2020](#)
- **Example Event - Pivoting during COVID:** Taking an event that can no longer be held in person and making it virtual. For instance, partner with a local bakery for a dog pie-eating contest. Participants register online (could even do something as simple as a PayPal payment) and submit their dog's information using [Google Forms](#). Participants pick up their pies over a designated weekend, film their dogs eating the pie, and email the video. Videos are uploaded into Facebook albums where viewers can "like" their favorites in each weight class. Videos with the most votes receive prizes along with a few other prizes for special, fun categories.
- **San Diego Humane Society Introductory Lunches**
 - Approximately every two months SDHS holds an introductory luncheon for guests to come to the shelter, hear a presentation from the President/CEO, and receive a tour of the facility from the Chief Philanthropy Officer. These events are targeted to introduce animal lovers who have the capacity to make a meaningful contribution to the organization to their work. The Advocacy Committee (formerly Philanthropy Committee) plays the lead role in ensuring that these lunches are at capacity, which is kept intentionally small. There is no solicitation made at these events, instead, philanthropy staff members follow up with all attendees to explore how/if they would like to be engaged with SDHS following the luncheon.



- Resources provided to attendees
 - Invitation letter to the luncheon
 - Materials list for what is provided to attendees
 - Luncheon welcome letter

Additional Example Resources:

- BARCS [Events](#)
- BARCS Facebook Post: [17th annual Online Auction Benefiting the BARCS Franky Fund](#)
- San Diego Humane: [Fundraising, Promotions & Educational Activities](#)
- Humane Rescue Alliance: [Special Events](#)

Tactic D: Direct Mail

Definition: A direct mail program represents the strategic work to acquire new donors, retain donors, and identify major gift prospects. The appeal letter acts as a reminder to donors who are inclined to give but need to be prompted. A general rule of thumb is to have a 2% return rate from donors.

What does this solve: A successful direct mail program is critical for an organization to maximize short-term and annual philanthropic revenue to support general operations and/or project expenses.

Step Details:

- **In-House:**
 - Identify donors to receive direct mail
 - Current donors: Focus on donors who have given to the organization before and who the organization is trying to encourage to give again. Criteria that may be used to identify the audience are:
 - Minimum annual donation amount
 - Donors who have given in the past two years
 - Total number of appeal letters to be mailed
 - Create an appeal letter
 - Tell a story in the appeal letter that is inspiring with an urgency that aligns with the ask, such as general operations or a project.
 - Include relevant pictures.
 - Use the word “you” to connect to the donor while making the donor feel critical for the organization's path forward or problem that needs to be solved.



- Use simple sentences, uncomplicated words, and a direct call to action.
- Include a remit slip for donors to include when mailing a gift and include the organization's online donation website to encourage online giving.
- **A La Carte Services (Mail house, Caging, etc)**
 - Several services can be used to support a direct mail program, without taking the entire process to an external vendor. The following are good options for when you want to continue producing your campaigns and mailing lists, but need assistance with mailing preparation and/or receiving and processing gifts. Organizations that use these services have seen their direct mail address lists and response rates surpass the resources and abilities of their staff.
 - Mail house services: These are printing plus services. Not all printers are familiar with direct mail, so in choosing one, make sure to ask if they have other clients in this space. Your mail house should be able to print unique variables on each piece of mail where you designate (salutation, asking gift amount, etc), take your mailing list and verify it through NCOA, assist you with nonprofit bulk mailing rates, and drop your mailing at the post office.
 - Caging "lockbox" and gift processing services: Lockbox, also known as caging, is the bundle of services involved in the responses to direct mail fundraising including PO box management, mail sorting, donation processing, acknowledgments, and reporting for import back into your database/CRM.
- **External Vendor**
 - Create a request for proposal (RFP) to identify the organizational goals for direct mail.
 - Share RFP with potential vendors and secure up to three presentations of the organization with external vendors.
 - Select a vendor with internal leadership.
 - In partnership with an external vendor, create an annual plan with a timeline.
 - Email the vendor the organization mail file.
 - Work with the vendor to decide if the organization or vendor is pulling addresses that meet the criteria and deleting duplicate addresses.
 - Appeal letter
 - Work with the vendor to decide if the organization or vendor is creating the content for review and edits.
 - Track
 - Include an appeal code on the return envelope and remit slip to track.
 - Add postage cost on the return envelope.



- **Acquisition:** Creating a mission-based mailer introducing a new recipient to your organization. Most companies with mail house services have access to lists for sale. In our field, most would choose to buy the HSUS and ASPCA lists from a designated mile radius of your shelter. Your mail house services should be able to suggest other lists for sale based on subjects/parameters you set.

Examples:

- [Appeal Letters with remit slips and return envelope](#)

Resources:

- [The Best Direct Mailing Service for a Nonprofit](#)
- [How to Optimize Your Nonprofit Direct Mail Marketing Campaign.](#)
- [How to Write a Direct Mail Fundraising Letter](#)

Tactic E: Corporate Partnerships

Definition: Corporate partnerships are mutually beneficial relationships to meet a common goal based on shared values when managed correctly.

- Partnerships is a broad term usually applied to relationships that have a combination of activities associated with them, for example, making an annual strategic plan for their philanthropic giving could be combined with a timed, one-off employee engagement campaign.
- Corporate sponsorship on the other hand is one of the most visible kinds of corporate support. In this model, businesses sponsor specific programs or events that the nonprofit runs. The business offsets the cost of the event, and in return, the nonprofit displays the business's name at the event or in advertising materials.
- **Consideration:** Typically, companies will want to provide restricted funding for programs, however, they may be able to provide large operating funds.
- **Examples:**
 - Cause marketing partnerships (CRM) or otherwise known as Cause Partnerships/Brand Partnerships: This is an agreement between your organization and a company that, when done effectively, creates benefits for both partners by providing financial support for the cause and marketing opportunities for the business. This can be through product sales, co-branding campaigns, and/or consumer engagement.
 - Workplace giving and matching gifts can also make up corporate dollars. Companies can be leveraged to engage their employees which may help your organization gain them as personal donors and/or volunteers.



What does this solve:

- Corporate sponsorship can help to offset costs related to events.
- Cause partnerships can be a good way to elevate your brand and mission.

Step Details:

Startup:

The easiest way to start is through event sponsorship. Once a partnership is established, build those sponsors further to become more robust partnerships with your organization.

- **Considerations:** If this is your first time setting up a corporate program that makes sense for your organization, consider the capacity of your team and consider the potential that the return on investment may not be seen at times for 6 to 12 months as it takes time to build.
- **Recommended steps:**
 - Build a list of any potential partners and examine all current sponsors.
 - Evaluate what types of companies would make sense as partners for your organization.
 - Notate businesses in your area that have strong, positive reputations and their expertise. If you can tie the business's expertise to your nonprofit work, even better!
 - Use leadership connections. Use any available connections you have in the community to get introductions with local businesses.
 - Your board members can be invaluable here. Board members may have connections to higher-level executives, such as CEOs, and will often be happy to facilitate introductions.
 - Reach out to your volunteers as some may have fruitful connections to area businesses as well.
 - Consider working with your major gifts team to see if they know any individuals that work for prospective companies on your list.
 - Do your due diligence.
 - Once you've identified a few promising businesses, make sure your values are aligned.
 - Look into their company culture and the values they reveal in the way they do business.
 - No monetary advantage is worth partnering with a business if you wouldn't be proud of the alliance.
 - Think of how you would feel seeing your two names together on a banner at your next event.



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- Make sure you do your research and choose a partner you respect.
- What is your price? This investment must be worth your time and energy.
 - Consider the contributions you would need to receive from a corporate partner versus the benefits that would merely be nice to have.
 - Do not over-contribute yourself if the returned benefits may add a burden down the road.
 - Your staff's capacity, future upgrades with corporate donors, and your organization's brand are all valuable too!
- Offer solutions: When you're meeting with potential partners, see if there are ways in which your nonprofit can help solve some of their problems.
 - Not all corporate partnerships will be the perfect fit, however, looking for areas where a business might want to improve can be key to identifying how they can support you.
- Present your vision and goals: Be sure to communicate clearly about your organization's vision and goals.
 - If you need to take in a certain amount of revenue each year for your programs to be viable, say that upfront.
 - Your new partners may have helpful ideas to contribute and communicating with your corporate partner about how its time, talents, and donations will make a difference through your organization can make executives and employees alike even more enthusiastic and committed.
- Set up strategy meetings: Once you've found a good fit, make sure you meet in person to discuss the details of your partnership.
 - Being clear about your hopes/expectations upfront and getting contractual details spelled out in writing can help make sure your collaboration is beneficial, harmonious, and productive for many years.

Short term goals:

Perhaps your organization has a mid-level corporate program and you want to grow it and diversify your partners. Often organizations can become reliant on one major corporate funder. This runs the risk of leadership changes at the company, a shift in corporate culture and values, and if they decide to assess their partnership with your organization, you do not want to be left with having to fill a major gap in your funding program. This is why growing and diversifying your partners is a key step in long-term sustainability.

- **Growing your partnerships**
 - Data is key: Tracking your data in a CRM (Customer Relationship Management) will help to understand and track your organization's relationships and interactions with the companies you are partnered with and their overall giving. These data points can help guide you on appropriate next steps regarding who and how to



steward the various stakeholders with a goal of improving business relationships, and in turn improving funding opportunities.

- Managing expectations: You should be regularly in touch with the companies you are working with and at the “end” of a partnership or the fiscal year, make a point to meet with your contacts and recap the year, the activities, and report on impact. This is an opportunity to ask them to review what worked and what didn’t, if expectations were met and how things could be improved, and goals for the year ahead. Make sure there were no surprises. If there were, explain them and be transparent.
- Upgrade your ask: Make the case for support on why they should give more and include an upgrade in your proposals.
- Donor feedback: Many organizations will conduct a donor survey by a third party. This makes companies feel valued and listened to and can be an open door for them to be completely uninhibited with their answers.
- Stewardship is critical: Is it time for your leadership/program staff to become involved in the stewardship process if they have not already?
- Matching gifts: If you have an active matching gift program, you may choose to store information about a company’s matching conditions. This helps to project matching gift revenue and helps you inform your donors about their employer’s matching program. You may choose to track an employer’s match rate (1:1, 1:2, etc.), match dollar limit, and any funding limitations related to your organization. In addition to tracking information about the employer’s matching program, be sure to link constituents like alumni, volunteers, members, and friends to employer records. Include a search on your website where individuals can find out if their company matches and include matching gift language in acknowledgments.
- Diversify engagement: Have you considered asking a current partner to provide matching funds for a program or campaign? This provides positive visibility to companies that seek to highlight their corporate social responsibility in your area.
- **Building a pipeline**
 - Research: Tracking the annual revenue range helps you prioritize among corporate prospects. You may track information about individual major gift prospects to prioritize and focus your asks on the best philanthropic match between your organization and your prospective donors.
 - Identify: Meet with your current partners and ask them if they can introduce you to other companies or prospective donors. Consider asking them to host a networking lunch on your behalf.
 - Qualify: Look into similar companies to the ones you are currently working with and evaluate if they would be a good fit as a partnership. Keep in mind the company may be a competitor to current partners and some partners may not like



this development. Try to offer something unique to that company rather than replicate the same partnership of your current corporate donor.

- Invite: Use your events to cultivate prospects. Your first outreach should never be an ask. Send something newsworthy that is meaningful to the company. Consider sharing what other companies are doing with you. It can take up to seven touches before a response. Thoughtful communication is as important as perseverance.

Advanced: You have many partners that are consistently bringing in a portion of your revenue. What's next?

Typically, you look at companies as donors, but there is a huge potential for cross-sector partnerships. Look at your relationships holistically. Ask yourself, "How can our organization and a brand marry complementary assets and values to create greater mutual impact?". Nonprofits can learn a lot about online consumer engagement and marketing from brands, not to mention leverage a corporate brand platform to spread messages and recruit supporters through marketing and sponsorship. The best nonprofit brand partnerships help nonprofits recruit new supporters and access support (financial and otherwise) they would never have achieved through core donor cultivation activities.

- **Pro-bono skills-based private sector support**
 - Consider a partner that may have some core competencies that could benefit your organization working in strategic areas such as human services, finance, animal welfare, the food industry, and legal issues.
 - A commitment to pro-bono service strengthens nonprofit capacity and mission effectiveness and allows employees to enhance skills and infuse social purpose into their work lives.
 - Ensure you are acknowledging all of their support including the in-kind value of goods and services.
- **Cause marketing partnerships, also known as commercial co-ventures (CCV)**
 - Cause marketing is a partnership between a nonprofit and a company for mutual benefit.
 - The company wants to enhance its reputation with customers and drive sales.
 - The cause wants to generate awareness for its mission and raise money. Unlike outright donations, cause marketing is a business deal.
 - Partners will expect something in return for their efforts although it comes under the guise of "giving."
 - Be hypersensitive to the potential risks some partners can present. Perception is very important and therefore you have to acknowledge the selfish side of cause marketing but stay focused on your needs so you aren't taken advantage of. Tips for a successful campaign:
 - To engage in cause marketing partnerships, businesses must register or complete other requirements in 24 states. Generally, these include filing a copy of the fundraising contract with state charity officials before launching a campaign and reporting financial results at its conclusion. Often, financial reports must be filed within a certain number of days of the close of the



campaign, although in some states, reports are due annually for all engagements conducted that year. A few states have more substantial requirements. Massachusetts, for example, requires commercial co-venturers to secure a bond. For companies, it can translate into a lot of complexity since every engagement requires filing a separate contract, and there would need to be a clear understanding of what is needed.

- Another type of cause marketing partnership that is becoming very popular is social media influencer campaigns. In these arrangements, a social media influencer will agree to support a charity by diverting a portion of proceeds from products sold through their page. The influencer usually has a legal entity to protect their interests and may need to enter a co-venture contract to do this properly.
- Requirements for Nonprofits: Your organization also must regulate due diligence to perform before engaging in cause marketing.
 - Make sure that your organization meets the charitable solicitation registration requirements for fundraising wherever you will be soliciting.
 - Some states require specific disclosure language to be included in cause marketing campaign materials. You may also need to include specific provisions in the co-venture contract.
 - The benefit of this type of transparency means that donors and nonprofits alike see dollars go to mission, and co-venture requirements are designed to ensure that happens.
- Choose a partner whose business aligns well with your programs and mission. Look for companies whose customer base, culture, products, or services are a good fit. Once you've attracted new donors with your campaign, be sure to work proactively to retain them!
- The benefits of cause marketing campaigns:
 - Both partners can experience an increase in brand loyalty
 - Supporting brands can see an increase in sales
 - Free exposure for the cause and partners such as press coverage, reviews, social media exposure, etc.
 - An edge over the competition for your partners
 - A more unique approach to marketing for partners
 - Shared exposure through leveraging of each other's marketing assets
 - Improved credibility for your cause
 - Improved reputation for partners
 - Marketing spends become more focused for partners
- Types of cause marketing campaigns:
 - 100% of sales
 - [Buy One, Give One](#)
 - Proud supporter - Anyone that donates may use your organization logo and list that they are a "proud supporter" of your organization on their materials.
 - Volunteerism partnership
 - Gift-matching
 - Call to action
 - Donation with purchase
 - Co-branded events



Examples:

- [Fitzgerald Subaru \(see partnership brochure\)](#)
- [Relationship management document](#)

Resources:

- [Engage for Good - Cause Marketing 101](#)
- No Kid Hungry [Corporate Partnerships](#)
- [Corporate Sponsorship | National Council of Nonprofits](#)
- [Corporate Pro Bono | Good Intentions, Great Results.](#)
- [BARCS](#) - Corporate Sponsorships
- Technology (CRMs)
 - [Salesforce](#)
 - [Raiser's Edge](#)

Tactic F: Grants

Definition: A grant is a sum of money that is awarded to charities to carry out a specific project or program.

What does this solve: Grants can provide additional funding to drive specific programs, especially well-established programs and new programs that need seed money to launch.

Step Details:

Startup:

- Create a list of organizational programs that may benefit from grant funding, both current and future opportunities.
- Visit [Charity Paws Animal Shelters/Rescues Resources](#) or The AAWA [Grant Sources](#) to view a list of available grantors.
- Contact funders to explain your organization's unique needs and to establish relationships

Short Term Goals:

- Many grantors will host webcasts to share best practices when applying for their grants. These webcasts are a GREAT way to hear about funding priorities and how your application can stand out. If you miss the webcast, always reach out to ask if there is a recording available.
- Start applying for grants! You can't win unless you apply!
- Create a tracking spreadsheet:



- Include each grant application you have submitted.
- After you've won a grant, create a secondary tab or spreadsheet tracking the grant requirements so that you have collected the necessary information for quarterly or yearly reports.

Long Term Goals:

- Build relationships with grantors. Don't hesitate to reach out and introduce yourself, ask questions, and listen to their priorities. This relationship will help you move to the top of the pile of applications.
- Create a PowerPoint deck that provides an overview of your organization that can be saved as a PDF and attached to grant applications. This is a great addition to applications and gives a clear holistic picture of your organization.
- When renewing funding for a program, ask if the grantor would consider multi-year grants.

Resources:

- Candid learning tools: <https://learning.candid.org/>

Tactic G: Major Gifts

Definition: Major gift programs represent the strategic, long-term work used to develop relationships and solicit donors, through oral asks or written proposals, for increased levels of support. While the definition of a major gift will vary by institution, a general rule of thumb is to identify what the gift level is for your highest 10% of donors. Those are your major donors!

This population of donors can be referred to as a Major Gift Portfolio which is managed by a designated employee or CEO. For many, the starting point to this work will not result in "major gifts", but in increased levels of annual support. The first major gift from a donor can be a test gift. This is when the donor makes a sizable donation, but not as much as the donor could give, and wants to experience the entire major gift process including stewardship that is offered. If the organization manages and meets the donor's expectation, another major gift ask is appropriate at a larger amount.

For all major gift programs, a critical key is to listen to your donor and to understand what the donor is most passionate about, then making connections to philanthropic opportunities within your organization.

What does this solve: A successful major gifts program is an essential element for any fully developed philanthropy team and will allow your organization to maximize its philanthropic



revenue. Major gifts provide an opportunity to your organization for transformational change as this population of donors is likely to be more interested in transformational impact.

Step Details:

Beginner:

- Define what a major gift is for your organization.
- Define staff roles to focus on major gift identification, qualification, cultivation, solicitation, and stewardship.
- Establish a major gift prospect list:
 - Current donors who have given for 5+ consecutive years
 - Current donors giving above \$1,000 (amount can vary)
 - Donors with high wealth ratings who are:
 - In your existing database
 - Have made a recent gift
- Establish a recognition program including:
 - Donor walls
 - Naming rights identified
 - Short term
 - Permanent
- Attend a major gift workshop to acquire the foundational skills to broaden knowledge into this specific type of relationship building.

Intermediate:

- Establish a leadership annual giving program and review annually to determine:
 - Upgrades to higher annual giving levels
 - Prospects for major gift solicitations in the next 6-12 months
- Staff to contact all donors above \$500 (amount may vary) to:
 - Thank the donor
 - Invite them for a shelter tour
 - Uncover key interests in the shelter
- Log contact reports for all notable interactions with donors.

Advanced:

- Dedicated staff should work on developing major gifts
- Develop engagement/solicitation strategies for top donors/prospects
 - Include the appropriate person with the donor at the appropriate time to maximize the experience!
- Exceptional donor stewardship is in place
- Blended asks: Annual/Major/Planned



- President/CEO to be appropriately involved in major gift cultivation/stewardship

Examples:

- [Gift proposal](#)
- [SDHS naming opportunities](#)

Resources:

- [Major Gift Fundraising Guide: Everything You Need to Know](#)
- [The Seven Keys to a Successful Major Gift Program](#)
- [5 Steps to Build a Major Gift Program from the Ground Up](#)
- [The 6 Pillars of Successful Major Gifts Programs](#)

Tactic H: Planned Giving

Definition: Planned giving includes a wide variety of gift types that can occur during a donor's lifetime or upon their death. Planned gifts do not come from discretionary income but from a donor's estate plan or appreciated assets.

What does this solve: Planned giving is an essential part of creating a sustainable organization because it gives donors ways to make major gifts during and after their lifetimes. Sometimes these are large gifts that a donor wouldn't have been able to make from their discretionary income alone. A robust planned giving program also lends respect and legitimacy to an organization by signaling to donors that they are planning for the future of the mission.

Step Details:

Beginner: Create a simple page on your website for planned giving that centers around estate planning and shares an example of bequest language [like this one](#) on the Friends of Pima Animal Care Center website. Include basic planned giving as an option in your regular marketing and solicitation schedules so that your supporters know it is an option.

Intermediate: Believe it or not, there are gifts out there that your organization doesn't want to, and sometimes even shouldn't, accept. Maybe the gift comes with too many liabilities or expenses or you're a very small team with limited capacity to manage certain gifts, like real estate. Work with your board of directors and/or legal counsel to create a gift acceptance policy for your organization.

- This [article from Bloomerang](#) can get you started. Encourage key philanthropy staff to speak with existing major donors about planned giving options.



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Advanced: Team up with a local financial and/or estate planner to offer free estate planning courses to your community every quarter. Segment donors whom you know to have your organization as part of their planned giving and give the group a name like Friends of PACC's Furever Friends. Create a stewardship calendar to regularly thank them with an annual mixer, exclusive email content, etc.

- Consider incentivizing planned giving by creating a pet guardianship program like [the robust one at San Diego Humane Society](#). This program allows donors who name San Diego Humane Society in their wills to also ensure their pet(s) will have the best care after their owners have passed.
- Planned giving program moves from being reactive to proactive by discussing planned giving options in tandem with most personal solicitations.

Examples:

- San Diego Humane Society's planned giving page: [Charitable Giving](#)
- Friends of PACC's planned giving page: [Lifesaving Legacy](#)

Resources:

- The Chronicle of Philanthropy's planned giving articles: <https://www.philanthropy.com/package/planned-giving-basics>
- PlannedGiving.com's Free Downloads and Resources: <https://plannedgiving.com/planned-giving-tools/>

Success story: Submitted by San Diego Humane Society

San Diego Humane Society's Humane Heritage Circle is a robust planned giving program with over 800 current members who have included SDHS in their estate plans. The program is administered by the Director of Gift & Estate Planning, a full-time staff member who focuses on managing planned giving. At this point in time, planned gifts provide approximately \$6M in revenue annually to support the mission of the San Diego Humane Society. This program has been effective in moving from a reactive one to a proactive program that looks to engage our supporters in considering planned giving options.

This happens in several ways:

- We host quarterly estate planning presentations where participants learn about how they can plan their estates and about our Pet Guardianship Program that ensures their animals are taken care of if they pass away.
- We contracted with the Stelter Group to compile a dedicated planned giving website that provides information on a variety of planned giving vehicles.
- We include discussions about gift planning with our major gift solicitations to ensure we are making "blended asks" as appropriate for these solicitations.
- We provide specific stewardship for HHC members including newsletters, stewardship events, and special messages from the CEO and other leadership



Tactic I: Stewardship

Definition: The process of thanking donors, demonstrating the impact of their philanthropy, and utilizing these actions to cultivate donors for future gifts.

What does this solve: Developing a successful stewardship program will reduce donor attrition, increase donor retention, and help lay the foundation for donor upgrades, leadership annual giving, and major giving programs.

Thanking donors helps to ensure that they will give again and in some cases, it is required by law.

- Per the IRS website:
 - The written acknowledgment required to substantiate a charitable contribution of \$250 or more must contain the following information
 - Name of the organization
 - Amount of cash contribution
 - Description (but not value) of non-cash contribution
 - Statement that no goods or services were provided by the organization if that is the case
 - Description and good faith estimate of the value of goods or services, if any, that organization provided in return for the contribution
 - Statement that goods or services, if any, that the organization provided in return for the contribution consisted entirely of intangible religious benefits if that was the case.
 - ([Charitable Contributions - Written Acknowledgments](#))

Step Details:

Beginner:

- Consistent acknowledgment process that provides an accurate and timely acknowledgment of a donation.
- Share timely touch points relevant to their donation
- Thank you call to donors: Consider if your organization would like to call all donors or only donors over a certain donation amount.
- Needs assessment to determine short and long-term goals.

Intermediate:

- Donor recognition development:
 - Donor walls/donor listings



- Specific stewardship development:
 - Leadership annual giving societies/donors
 - Planned giving donors
 - Monthly donors
 - Multi-year donors

Advanced:

- Dedicated staff focused on developing/implementing a stewardship program.
- Segmented first-time donor stewardship communications created.
- Stewardship plan developed for:
 - Leadership donors
 - Legacy donors
 - Sustaining donors
- Endowment reports
- Thank you calls to all donors above a certain donation amount (determined by organization)
- President/CEO/Program staff integrated into stewardship:
 - Letters
 - Emails
 - Videos
- Stewardship is a strategic, year-round process designed to demonstrate impact in a few ways:
 - Stories
 - Data
 - Personalized stewardship/engagement plans for top donors

Examples:

- Thankview video messages by audience:
 - Individuals
 - Groups
- Personalized impact reports
 - [SDHS personalized impact reports](#)
- General acknowledgment letters
 - [SDHS acknowledgement letters](#)
- Wikipedia acknowledgments
- Restricted gift thank you cards/notes
- [SDHS Humane Leaders Circle Survey](#)
- Photobooks/galleries
 - [SDHS Donor Photobook Example](#)

Resources:

- [Charitable Contributions - Written Acknowledgments](#) - IRS

Success story:

Tami Gosheff: At BARCS (Baltimore Animal Rescue and Care Shelter), an adopter eventually became a major donor in just over a year. After a family adopted a dog from BARCS, they started attending fundraising events. As they learned more about the organization, they began donating to our various medical campaigns, donating \$4,000 in year one and again in year two. Before adopting, they had never donated to BARCS.

- As we got to know them, we visited them, spoke with them on the phone, and emailed them updates to let them know how much their gifts meant to our animals. They started to get more involved with our fundraising events, collecting high-end items for our auctions. They also signed up to be monthly donors. As we got to know them more and more, it became clear that they had a large and promising capacity to give.
- It was during that time that we launched the capital campaign for our new shelter, so we included them in our feasibility and planning study. In the end, they gave \$30,000 to the campaign.

Tactic J: Monthly donor / Sustaining donor

Definition: Automated recurring donations from individual donors for a steady stream of revenue, typically unrestricted.

What does this solve: Recurring donations allow for your organization to plan your monthly income, regardless of campaigns, both planned and unplanned.

Step Details:

Beginner: The first step when creating a monthly recurring donor program is to find an automated payment collector. The platform you choose should be secure in storing credit card information and able to automatically charge donations on your behalf. If you have a CRM, check with your representative about the built-in options for recurring payments--it is very likely that it is an included or add-on service of your CRM.

- If your CRM does not have a recurring donation feature, there are a few services that do well with donor information exporting so that you can cultivate your monthly supporters, such as PayPal.
- **How to get monthly donors:** Make a case for your needs.



- What does your shelter need to open its doors every day?
- How do reliable donations give you the security to say ‘yes’ to animals in need?
- Without directly referencing it as a “paycheck” describe the importance to donors in a way they can understand, like their own paychecks.
- Ask for reasonable amounts that the majority of donors wouldn’t “miss” in their bank accounts. Sure, a \$1K/month donor would be ideal, but tailoring your communications to get 100 \$10/month donors, or 200 \$5/month donors will be more achievable and build a more solid foundation for the program.

Intermediate: How to keep monthly donors.

- Name the program and treat those donors like a special VIP club.
 - “Constant Companions,” “Faithful Friends,” “Guardians”: Giving your program a name helps you communicate to your members and gives them a sense of importance to your organization. Monthly communications to this group are key to sustaining their membership and investment in your organization. In addition to any automated receipts for each of their gifts, put together a monthly communication that goes directly and exclusively to this group. This might be in the form of a newsletter, or simply present as a direct email from a member of your staff or volunteer.
- Tips on monthly cultivation communications:
 - Tell them what their gift did (NEW STORY every month!) to save a life and tell them what you are planning to do with their gift next month. The second part is key to curbing cancellations.
 - The best performing stories for these monthly communications are individual animal stories.
 - “You, you, you, YOU!”: It is key that in your communications to your monthly donors you remember the golden rule: Every single accomplishment was made possible by the donor.
 - Bad: “BARCS was able to pay for Fluffy’s medical bills and get her adopted to a great family.”
 - Good: “Fluffy’s life was saved in the ER that day because of you. Your steadfast support saw to it that she got her happily ever after in a wonderful, loving home.”
- How to keep donors 2.0 - Following up on failed transactions and expired credit cards:
 - Depending on your CRM, you will either get notified of a failed recurring transaction or, if your system is more advanced, that a donor’s current credit card on file is coming up on its expiration. It’s important to reach out to your donors and let them know when there has been or soon will be, an interruption in their donation schedule. While we don’t recommend using this communication to ask



them to increase their gift, you will find that donors will often increase their donations at this point.

Advanced: Leveling up: Getting your current monthly donors to increase their gift.

The key to asking your current monthly donors to increase their gift is to have solid prior communications about what you are doing with their current gift (above under intermediate). You can't skip to asking for more money without showing your supporters MONTHLY what their money has been doing. We recommend that recurring donors are not asked for an increase on their monthly gift until they have received at least 6 months of a newsletter, email, or other special communication.

- 6+ months into communications: Start with a lifesaving animal story: “**Your** gift did this!”
- Close your letter with a P.S.: “Would you consider giving a \$5/month increase to your gift? Every extra dollar makes a difference in the lives of animals in need at BARCS. You can do this easily by [visiting our website](#). If you need assistance, please don't hesitate to reach out to give@barcs.org.”

Examples:

- [Monthly Donations to the Arizona Humane Society](#)
- [Join PAWS Chicago's Lifeline Monthly Giving Program](#)
- [SDHS “Because of you” newsletter example](#)
- [Example email from SDHS updating donors on results of a hoarding case](#)

Resources:

- [Here's a quick start for a great monthly-giving program](#)

Tactic K: Other programs

Definition: The most simple and traditional donation comes from a business or an individual giving money directly to your organization. However, there are many other ways to raise money for your organization aside from direct donations such as third-party fundraisers, retail/merchandise sales, workplace giving/matching gifts, vehicle donations, and peer-to-peer fundraising.

What does this solve: Implementing other giving programs can introduce your organization to new donors, as well as increase donations from existing donors. Many of these programs are advertised by a third party, thus exposing your organization to a new audience. These programs empower donors who may not be able to personally donate a substantial amount by giving them the opportunity to make a significant impact - all while feeling like they are part of your mission.

Workplace giving enables you to receive the gifts made via payroll deduction and makes you eligible to receive matching gifts. Enrolling in these programs shows that you are willing to adapt to the donor's unique giving requirements.

Step Details:

Beginner: Car donations, workplace giving, third party fundraisers, Amazon Smile

- **Getting Started:** Giveback/third-party events are an easy way to get started! Connect with a local business that perhaps you have partnered with before. If this is brand new, look for a successful business in your community and reach out. Set up a “giveback” agreement in which they will donate a percentage of sales to your organization. Advertise via social media and ask your network (board, volunteers, donors) to participate and spread the word. The business should also promote the partnership.

Intermediate: Peer-to-peer

Advanced: State/local charity campaigns (fees and lengthy applications involved)

Program Overviews:

- **“Third-party fundraisers”** are when a business or outside group holds a fundraiser on your behalf. These can be great opportunities because the outside business/group often organizes the fundraiser, markets it, etc. The challenge comes with managing expectations and it is advised that a formal agreement is signed. This protects your organization's name, should that group not remit the payment. It also helps to set expectations. The downside is that you often do not receive donor information, as that is typically all run through the third party hosting your event. You may ask if they have a registration list, ticketing, etc. to share this list with your organization.
 - Examples
 - Third-party agreements
 - [BARCS - Host Event](#)
 - [Six Ways to Fundraise for the Animals](#)
 - [Host a Fundraising Event](#)
 - Third-party/giveback events:
 - [Fundraising, Promotions & Educational Activities](#)
 - [Kitten & Puppy Yoga: Virtual Fundraiser for Humane Rescue Alliance](#)
 - [Italian Brunch Fundraiser](#)
- **Vehicle donations** are another easy way to generate donations. There are many companies to choose from who will manage the entire process for you. While they do take a fee, the



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process is easy to manage, once you have an agreement with one of the auto auction companies. Advertising your program will only help to generate additional donations and the vehicle donation companies have tips on how to market your program. Many of the companies have templates, flyers, and marketing language to help you promote your program. There are no risks, sign-up fees, etc. The third-party vendors also provide you with donor details so that you can hopefully turn that one-time vehicle donor into a continuing supporter of your organization.

- Examples
 - Car donations:
 - [Baltimore Animal Rescue & Care Shelter Vehicle Donation Program](#)
 - [Vehicle Donation](#) - Humane Rescue Alliance
- **Peer-to-peer fundraising** involves asking your supporters to raise money on behalf of your organization. An easy way to do this is via social media such as Facebook, as people can then raise money for your birthday or any other occasion. You do need to register with Facebook fundraising to provide them with your banking info for direct deposits. The downside is that the donor information from Facebook is very, very limited.
 - You may also choose to set up your peer-to-peer fundraising website. There are a variety of tools to choose from. If you already have a donor database, they may offer a peer-to-peer model. If not, there are a few free products available (see below). For this to be a success, your organization will need an existing list of donors, volunteers, supporters, etc. to reach out to and encourage to fundraise on your behalf.
 - This model of fundraising is typically not successful otherwise unless you can tie it to an existing event that has the potential to attract new attendees. For instance, if you already host a run or walk, add peer-to-peer to increase donations beyond the simple registration fee.
 - Examples
 - Peer to Peer
 - [2021 Virtual Walk for Animals](#)
- **Workplace giving/matching gifts** can be a relatively easy way to generate additional funds, however, there are some downsides. You will need to register with what are known as “charity aggregators” (see examples below). Many large corporations offer either matching gifts and/or payroll giving to their employees, so by registering with the various charity aggregators, you essentially include your organization in the list of charities they can choose from. Because many corporations operate strictly through these charity aggregators, if a donor submits a matching gift request, you need to be registered with the aggregator to receive payment.
 - Many corporations encourage and even incentivize their employees to sign up for direct payroll giving. Matching gifts are an easy way to increase donations but of course, rely on a donor making that initial gift to your organization. Someone from



your organization will need to confirm matching gifts electronically, otherwise, you will not receive payment.

- The downside is that there is a wide variety of reporting amongst the various charity aggregators. While some reporting is easy to use and provides complete donor information, some charity aggregators are more cumbersome and donor information is lacking. Some donors choose to remain anonymous.
- Donors may also choose to donate to a specific fund (i.e. a restricted fund) so when the payments do come in, that will need to be reconciled with your accounting/finance department.
- Many state and local government agencies offer direct payroll contributions to their employees, so you should check to see what is available in your area. The fees taken from these gifts tend to be rather high and some of the application processes can be quite complicated and cumbersome. Local United Way agencies also offer similar giving programs.
- Example
 - Workplace giving and matching gifts:
 - [More Ways To Give](#) - BARCS
 - [Matching Gifts](#) - Humane Rescue Alliance
 - [Matching Gifts & Workplace Giving](#) - San Diego Humane
- **Online retail sales** are another way to generate revenue while also enhancing your brand. Volunteers, donors, etc. wearing your branded apparel in public provides free advertising. It can also open up a conversation for others to learn more about your shelter, ways to support, etc. Offering branded apparel also helps build staff and volunteer morale.
 - While you can sell apparel in-shelter, at events, etc., inventory management can be challenging. Many shelters do not have the space to store apparel and tracking and shipping inventory is rather time-consuming. An online shop such as Threadless can make retail sales much easier, more manageable, and in the end, more profitable. It also enables you to offer a bigger variety of apparel and does not require the rather risky investment that in-house sales pose.
 - Example
 - Online retail:
 - [BARCS Online Shop | Featuring custom t-shirts, prints, and more](#)
 - Online promos/contests:
 - <https://www.facebook.com/SanDiegoHumaneSociety/app/137541772984354>

Technology:

- [Benevity](#)



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- [YourCause](#)
- [Network for Good](#)
- [CyberGrants](#)
- [America's Charities](#)
- [CARS Auto Donation](#)
- [Donateacar.com](#)
- [GoFundMe](#)
- [Donately](#)
- [Give Lively](#)
- [Amazon Smile](#)
- [Facebook](#)