

ANGLICAN RELIEF AND DEVELOPMENT FUND

Development Plan

- **Target Donor Populations**
- **Donor Identification, Cultivation, Acquisition, Giving Levels, Recognition, and Stewardship**
- **Review of Recent Donor Trends**
- **Annual Goal Table of Gifts**
- **Development Survey Results and Analysis**
- **Effective Solicitation of Donors**

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Prepared and © by

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ANGLICAN RELIEF AND DEVELOPMENT FUND DEVELOPMENT PLAN

Introduction

Anglican Relief and Development Fund (ARDF), headquartered in Ambridge, PA, sustains a remarkable program assisting world-wide Christian mission work through development projects and domestic disaster relief assistance. The organization's small professional staff accomplishes the enormous responsibility of identifying, vetting, promoting, funding, managing, and reporting on the good work of this outreach. A dedicated group of trustees guides the staff by providing organizational oversight, strategic direction, policy setting and implementation, and direct assistance with helping to ensure the financial well-being of ARDF.

It is in the context of that final area of board responsibility that the Executive Director sought the professional counsel of William Hinman, CFRE/MBA, president of William Hinman Consulting (the Consultant), Winston-Salem, NC, in order to review current practices, assess the viability of procedures utilized to support the organization's mission through broad-based fund raising, and to create a Development Plan to help direct ARDF's overall development (fund raising) program.

This Plan, then, is the result of a four-month study by the Consultant in close collaboration with ARDF staff and board members. Organizational information, documents, and practices were reviewed, a Development and Fundraising Committee workshop was conducted, a board/staff survey was distributed, and the Consultant compiled findings and recommendations in this plan, submitted to ARDF for its adoption and use in future development efforts.

ARDF, especially through its very capable staff, does an outstanding job of securing gifts and pledges of support from its base of contributors. From excellent materials to innovative ways to present the stories of lives touched by the organization's funding support, ARDF helps donors understand the significant difference it is making for thousands and thousands of people near and far. The Consultant has found that the development program in place is quite sound.

Recommendations made in this report are intended to suggest ways to fine-tune a smoothly running endeavor, rather than to correct or replace problems.

It has been a distinct privilege and an enjoyable task to work alongside Bill Deiss, Christine Jones, Kelli Hample, and the other staff members, as well as trustees David Souter and Barb Nelson. With God's perfect wisdom and authority over all things, ARDF faces exciting opportunities to continue spreading His love, grace, and mercy around the globe.

William Hinman
May 28, 2019

ANGLICAN RELIEF AND DEVELOPMENT FUND DEVELOPMENT PLAN

I. TARGET DONOR POPULATIONS

Annual support for any non-profit organization comes from one or more of the four major categories of donors: individuals (who contribute as much as 85-90% of all giving), foundations, companies (including other organizations, such as civic clubs, churches, etc.), and governmental entities.

Keys to Success for Annual Giving

Annual support thrives when organizations keep in mind these key issues:

1. Clear vision and mission-based operations
2. Strategic planning with specific goals and objectives for the current year
3. Key staff and board leadership management of the planning and development stages
4. Written policies in place for receiving, acknowledging, and managing gifts and pledges
5. Board consensus and ownership of the fund-raising plans and activities
6. Articulated purposes of funds to be raised (e.g., what are this year's top three priorities?)
7. Recruitment of top-notch development committee with written description of duties and expectations (many organizations name an annual fund chair and sometimes committee)
8. Identification and evaluation (i.e., assessment of giving potential) of prospects for support, especially leadership-level donors, including review of all current donors with assessment of potential higher levels of giving for the new year
9. Clear, written strategies and action plans for soliciting prospects at every level of giving
10. 100% personal financial commitments from board members and development committee
11. Regular meetings of the annual fund team to assess progress and assign follow-up
12. Persistence, follow-through, and passion for completing all solicitations on schedule
13. Wrap-up phase to assure orderly transition from active primary solicitations into later secondary solicitations, as appropriate (Note: some organizations use a rolling solicitation approach, while others purposefully solicit all donors multiple times during the same year – each annual fund campaign establishes its own goals and strategies)
14. Year-end solicitations, especially of non-responders
15. Victory celebration for the volunteer and staff solicitation team members!

Successful annual fund drives have consistently demonstrated that the best success comes from methodical, diligent effort "behind the scenes" concentrating on laying sound plans, building early momentum, and sustaining a systematic approach to solicitations until the process is complete and, hopefully, the goal is met – or surpassed!

Annual giving is about four basic elements:

1. Friend raising more than fund raising;
2. Moving current donors up on the scale of giving;
3. Constantly seeking new donors to replace lapsed donors; and
4. Maintaining accurate donor records.

Primary Donor Categories of ARDF

ARDF is financially supported by these primary categories of donors:

- Individuals
- Churches and Dioceses
- Foundations

It is no surprise that an Anglican organization such as ARDF is almost wholly supported by Anglicans – and that those Anglicans are overwhelmingly located in North America.

Therefore, ARDF needs to constantly and creatively seek ways to broaden and deepen its donor base in order to maximize efforts to partner with members of the Anglican faith. Spending resources of funds, time, and talent on trying to bring in “non-Anglican” support will result in generally disappointing outcomes (with the obvious exception of charitable foundation efforts). Focusing resources on ways to reach more Anglican individuals, churches, and dioceses clearly brings more desirable and sustainable returns on investments.

ARDF will find its support continuing to be derived from the above-named three primary categories: Anglican individuals, Anglican churches and dioceses, and foundations.

Further Segmenting the Donor Base

Within the targeted Anglican donor base for ARDF there is further segmentation that can help target fund-raising for higher returns:

- High net worth individuals (for obvious reasons)
- Senior adult individuals (who as a group generally have more disposable income)
- Former trustees (who have thereby been closest to ARDF)
- Donors known directly either by ARDF trustees and staff and/or by local ARDF contacts willing to help “open doors” (“people give to people”)

- Donors who have given for two or more years to ARDF (typically there is about a 40% attrition rate among donors asked to contribute for a second year, yet about an 85% retention rate between years 2 and 3)
- Individuals and family members of theirs who have participated in direct mission work or visitation trips (first-hand knowledge of and appreciation for ARDF's type of work)
- Anglican congregations which have demonstrated interest in and financial support for ARDF's mission and projects (and this segment is an *enormous opportunity* for education and cultivation of future donors)
- Diocesan and synodal budget allocations (wherein ARDF would work with leadership to create regular and sustained broad support for ARDF within the integral structure of the Anglican Church of North America (ACNA))

It is apparent to the Consultant that ARDF's staff has done an excellent job of recognizing factors such as these regarding its donor base, and strives to constantly seek ways to increase its annually contributed income.

II. DONOR IDENTIFICATION, CULTIVATION, ACQUISITION, GIVING LEVELS, RECOGNITION, AND STEWARDSHIP

A. Donor Identification

ARDF must rely on personal connections with prospects for support rather than computer-generated lists of likely givers. The age-old adage in non-profit development circles is that people give to people. The Consultant adds to that “with good causes.” Therefore, ARDF must develop a systemic approach to identifying best prospects. Questions posed to those who can help identify these donors (see further in this chapter regarding a proposal for how to structure such a program) might include:

1. Who do I *know* or *do business with*, who might be interested in our work?
2. Who do I *know of* who might be interested?
3. Who likes our Christ-centered, outreach-based efforts and cares about those we serve?
4. Who likes what we do, what our organization is all about?
5. Who is well-off financially who might find appealing an opportunity to do something good in the face of domestic disaster relief or international mission work?
6. Who might like to have a naming opportunity (for themselves, or to honor or memorialize someone else)?
7. Who did I help out by making a contribution (money or time) to a project of theirs?
8. Who did I help out by giving them consideration in a business transaction?
9. Who do I know who knew/knows [our founder(s), our leader(s), board members]?
10. Who could I talk to about their ideas for potential other prospects for support?
11. What lists could I bring in of donors to other similar projects? Looking over them, do possible prospects for support for *our* work come to mind?
12. What stone have we not overturned yet in trying to identify and contact those who can help us achieve success in this important work we do?

Proposed Method of Developing Prospect Lists

Creating local prospect lists at the 10,000-foot level of ARDF’s offices is problematic at best, ineffective at the least. The process has to begin at “ground level” – that is, within local Anglican congregations and dioceses.

ARDF should begin a system of creating local (or at least regional) **development teams**, composed of ARDF donors already loyal to and supportive of ARDF’s work and mission. Teams could be as small as a handful or as large as necessary. Team leadership is the single most critical

success key: someone committed to creating and sustaining a systematic process of identifying, evaluating (see next section in this chapter), educating, contacting, and soliciting prospective contributors. Teams need not meet in person regularly but must adopt a practice of frequent communication (text, email, USPS mail, teleconferencing, etc.). Clear definition of team purpose, process, and products (the 3 P's) will be provided by ARDF staff, as well as an appropriate timetable for actions and reporting.

The primary goal of each development team is to locate and bring to ARDF potential donors. By driving this process to the local level, results will be automatically more productive and more likely to result in higher contributions. More than just names, ARDF seeks vetting that helps identify and evaluate those both capable of and motivated to give generously. Think “hot list” versus “cold list.” Who will most likely to say yes, with a generous heart and wallet, if asked to give in support of ARDF?

A tactical error could be made should ARDF attempt to roll out such a new, far-reaching program on too broad a scale at the outset. Beta testing in selected areas can help fine-tune the effort before it is gently eased into the mainstream practices of ARDF development work. The Consultant suggest beginning with three initial development teams, and perhaps growing by three new teams over each succeeding year until the program reaches as broadly as feasibly given current ARDF staff capacity to manage the effort. (In time, once proven effective, this one program could easily support a dedicated staff position within ARDF – and not necessarily on-site in Ambridge, for that matter.)

Metaphorically, when confronted by an expansive buffet, diners begin with items familiar to their palette and appealing to their eyes. Donors today are bombarded with a smorgasbord of giving opportunities! Offer them a more regional diet prepared by local chefs, and they are more likely to reach toward those foods, not to mention enjoy the meal all the more and recommend it to their family and friends.

B. Donor Cultivation

“Donor cultivation” is fund-raising jargon for education. It is about *sharing our story so that others are drawn to it and will embrace and support it*. The world is noisy and confusing, so our story must be made concise and compelling.

A good case for support (as an organization's story is known in development circles):

- Describes the benefits derived by the community(-ies) served by the organization as well as donors to it through support of the organization – shows who directly benefits
- Creates enthusiasm for the mission and vision of the organization
- Briefly highlights the organization's history of providing quality services/facilities to the community

- Details the project/program expenses, including fund-raising costs
- Distinguishes the vital and special role of the organization (if the organization did not provide these services/facilities, who would?)
- Addresses community-wide issues, demonstrating how the organization is helping to address the issues in a positive way
- Makes a compelling case for prospects to become involved – with volunteer effort *and* financial support
- Shows the donor prospect how to make a pledge or gift, including the pledge payment period [e.g., Proven Partners in ARDF’s case]
- Identifies the well-respected community leaders behind the project: *Who has committed their time and talents to make it happen?*
- Is concise, readable, and well-formatted

The Consultant is quite impressed with the literature and videos that are produced and utilized by ARDF in its fund-raising activities. From well-crafted letters (both asking for and acknowledging receipt of gifts), to sterling statements of need (individual project profiles), and to captivating stories shared in colorful videos, ARDF provides outstanding information in very attractive formats.

It would be helpful to seek ways to further constrict how much information is provided. Allowing more “white space” or margins in printed materials makes it more palatable to the reader. It also tends to make those words and images that are included appear even more significant, as well as giving “breathing room” around the information for the reader to reflect and digest.

One method of helping to open up such printed promotional materials is to offer layers. That is, something of an executive summary supplemented by ever-deeper supporting materials as necessary. Fanned pages in a booklet or packet (today, most often tabs or drop-down menus on a web page), let the reader go only as deeply into the subject as she or he is interested and willing to go. For some donors, the essential highlights are enough (remember, they are giving to people, not documents: Who asks is more important than printed materials provided). For others, their curiosity or desire to thoroughly investigate before deciding to support is vital and they need “all the facts.”

It is always more important to quickly make the case and then allow the prospect to consider their response, than to attempt to tell them practically everything we know before letting them come up for air. Just as silence following an in-person request for support honors the donor’s need to carefully weigh what has been asked, so a well-structured document gives them space to insert their personal feelings and responses.

Perhaps the biggest challenge for ARDF in terms of cultivating prospective donors is how to actually meet with them. Distance solicitations are by nature less effective than in-person asks. The give-and-take of a sit-down opportunity both respects the donor's invaluable time and potential interest, as well as allowing for questions to be directly answered and responses to be tailored to the immediate perception of willingness to consider making a gift. When ARDF's donor base is spread across the entire North American continent (and occasionally around the globe), such personal cultivation/education becomes problematic if not seemingly impossible or at least improbable.

Hence, the aforementioned notion of creating more localized development teams. Whether these teams ever make one-on-one solicitation calls or not, they do offer the critically important element of being able to provide on-site educational sessions such as at local congregations or during meetings of dioceses and synods. Put simply, the more personalized the presentation, the more effective the solicitation.

C. Donor Acquisition

As one development professional put it, "People do not just reach for their checkbooks. They have to be asked to give. People with money are accustomed to being asked for it. The worst thing they can do is say no." He goes on to urge: "**Don't wait for the "right" moment to ask - ask now.** Once you have presented your case, ask for the money. Either close the sale, find out what the objection to giving is and overcome it, or get your turndown and move on." And finally, "Successful fund-raising officers do not ask for money. They get others to ask for it. It is the officer's job to design and manage the campaign. The request to give should come from a volunteer within the prospect's peer group." (*Adapted from It's a Great Day to Fund Raise! by Tony Pederis, as reprinted in NSFRE News, November/December 1997, p. 6.*)

This consultant suggests that these time-tested truths should guide how ARDF continues to pursue a successful development program:

Empower peer volunteers to tell the story and then make the ask!

Too often an organization's development staff mistakenly comes to believe that the success (or shortcoming) of their program rests solely on their shoulders. However, acquiring donors and moving them toward becoming loyal and sustaining givers is a shared responsibility among staff, board, and community volunteers. All three legs must be balanced beneath the stool, or the stool doesn't stand.

Ultimately, as ARDF's base of donors is organic to its denomination, the more ARDF knows that denomination and the more that denomination knows ARDF, the more successful both will be. Both the Great Commission and Christ's admonition to serve those less fortunate than ourselves are mutually compelling for all Anglicans and their relief and development organization.

Board Responsibilities in Fund Raising

ARDF trustees should view their role in the process of sustaining a healthy development program for the organization. It is always a shared responsibility between board and staff.

What Trustees Should Expect to Provide to ARDF:

1. passion and enthusiasm for the cause, the organization, and the board's work
2. 100% financial participation - whether large or small, year-in and year-out
3. help in finding/providing ways to provide seed money to get new programs/projects started
4. assistance in identifying viable prospects for organizational leadership and financial support
5. willingness to support the executive director and staff as they strive to fulfill their duties
6. ability to work as a team, to be flexible, and to help come up with creative solutions to the inevitable challenges which will come up during the course of events
7. desire and availability to actively & productively serve on committees
8. for all board members, always being positive ambassadors on behalf of the organization

What Trustees Should Expect to Receive from ARDF:

1. recruitment with a clear explanation of the nature and scope of service on the board
2. a written description of duties and responsibilities for role(s) played on the team
3. accurate and timely reporting of activities and finances
4. periodic personal contact from the executive director
5. hard, meaningful work in an enjoyable, satisfying culture of *esprit de corps*

Each member of the team brings strengths and weaknesses: play to the strengths and help build up the weaknesses - among all members. Take the initiative. Accept responsibility and don't try to "assign blame." Focus on achieving success, not worrying about defeat.

D. Donor Giving Levels

Almost every non-profit that has a thriving development program incorporates clear suggestions of donor commitment levels. Often referred to as "gift clubs" or "giving tiers," these provide guidance and encouragement to the donor to respond specifically in ways and amounts that help the organization fulfill its mission and meet its objectives.

ARDF should institute a culture of suggested giving levels, under the broad categories of leadership donors and annual supporters. Possible tiers for annual commitments would be:

<u>ANNUAL GIVING TIERS</u>	
<u>Leadership Circle</u>	
\$ _____	Where You go, I will follow
100,000 & above	Diamond
\$25,000+	Platinum
10,000+	Gold
5,000+	Silver
2,500+	Bronze
1,000+	Leader
<u>Annual Sustainers</u>	
\$ _____	Other
500+	Visionary
250+	Missionary
100+	Friend

Note that tier names are best when they directly relate to the work of the organization. The Consultant leaves it to trustees and staff to come up with something better than the traditional precious metal categories shown above, along the lines of the mission-cognizant names suggested under Annual Sustainers.

Vitally important to inculcate in the giving level structure are two factors:

- a) Always list giving levels from highest to lowest (and do not offer something less than \$100...let the donor fill in smaller amounts in an “other” line that is above other listed amounts); and
- b) One does not get more than one asks for, so ensure that the highest suggested amount supersedes ARDF’s typical highest giving level.

It is also fine to consider numbers that divide evenly by 12 months, in order to further encourage ongoing commitments made by credit card or bank account debits. For example, rather than \$500, suggest \$600 or \$50 per month.

The concept of offering suggested giving levels is multi-layered:

- a) Donors need and appreciate guidance in how much they should give (during the ask, whether in person or by letter, it is consistently more effective to propose a specific

tier, such as “We’d like you to carefully and prayerfully consider a leadership gift of \$10,000 per year,” rather than to say only “We hope you’ll be generous.” A giving range is also still better than just a “please give.”

- b) The giving levels indicate the full range of gift commitments that are needed in order to meet the goal for the fund drive, either annual giving or a special request.
- c) Seeing other, higher levels helps encourage donors to move up the ladder over time. Otherwise, a \$100 faithful donor is actually giving less per year due to inflationary cost factors. Even at only 3% annual inflation, a \$100 yearly gift is only worth \$74 after 10 years.
- d) By listing donors under each category – for example, in an annual report recognizing contributors – they may sense that they would like to be listed in a higher category with peers, noting also how many fewer names are indicated as the higher level donors. This is a subtle, yet powerful and effective tool for ARDF to utilize in encouraging supporters to increase their commitments.

E. Recognition and Stewardship

The Consultant recognizes that ARDF overall does an excellent job of recognizing its donors and stewarding their financial support.

Thanking donors and overseeing the spending and accounting of their gifts obviously goes well beyond a perfunctory letter acknowledging the gift and satisfying governmental requirements for gift reporting. ARDF provides outstanding follow-up reporting on expenditure of its funding support, with high accountability for how the plans for assistance were carried out. Requests for financial details are met fully and in a timely manner. Regular communications and a well-produced annual report help donors stay in touch with the significant impacts accomplished through their support of ARDF. The Consultant also is aware that ARDF staff make themselves available at numerous Anglican gatherings, both domestically and internationally, where they are immediately accessible to many donors to provide additional gratitude and transparency.

The Consultant proposed – and ARDF enacted – a program to enhance board/donor relationships. The top (approximately) fifty donors were identified, assigned to trustees, and a system has been instituted to make direct personal contact with major donors on an ongoing basis. It is expected that this project will bear much good fruit in the coming years.

BOARD-DONOR CULTIVATION PROJECT

Goal To connect individual board members with major ARDF donors, in order to continue building a strong relationship with our most generous supporters.

Key Strategy

Each board member is asked to select (or is assigned) one to several donors whom they will contact (in person or by phone). The purpose of the communication is to accomplish three things:

1. Thank the donor for their generous support of ARDF.
2. Share a recent success story about ARDF's work (staff will provide this).
3. Ask the donor to tell us what we can do to help ensure their ongoing support.

We hope to reach out to our top 40-50 donors who together provide some 2/3rds of ARDF's annual budget. We want them to know we appreciate them, we are here to respond to their suggestions and ideas, and that ARDF continues to be a powerful tool in taking Christ's love and care around the world.

Staff Provides:

- Cards (or sheets) with major donor's name, contact information, and most recent gift.
- Recent success story – a brief, compelling story about how ARDF financial support made a real difference in peoples' lives; a story that board members can easily “put into their own words” and share with major donors.

Trustees Provide:

- Willingness to personally contact up to two major donors. Where possible, meet in person; otherwise, link up by telephone.
- A genuine, personalized expression of gratitude for the donor's financial support.
- A listening ear to learn if we can improve what we do in any way.

Finally, stewarding donors' gifts well means donors are more likely to continue supporting ARDF's mission and work. When the donor genuinely feels that their support matters – that it makes a real difference in others' lives – and that ARDF truly appreciates their gift, no matter whether large or small in amount, the donor develops a feeling of partnership and belonging to the team of ARDF. One of the most powerful factors motivating donors to make annual contributions is just such a feeling of “being one of the members of the group.” Close friendships endure, mere acquaintances come and go.

One More Way to Say Thank You – and Encourage More Giving

ARDF may want to offer “donor profiles” as yet another way to thank that donor while further encouraging other gifts. Photographs of the donor (especially if they have visited one of the mission or disaster relief locations), with a brief telling of how they came to know about ARDF and what motivated them to support its work, are inspiring for others. The sketch should be brief, but can center on a factor that is universal in nature and therefore can be related to by other donors.

This approach has been proven highly effective particularly when used to emphasize planned gifts made to an organization. Occasionally share stories like “We decided to make a significant commitment to ARDF as a part of our estate plan because....”

III. REVIEW OF RECENT DONOR TRENDS

<u>ANALYSIS OF 2018 GIVING</u>					
<u># GIFTS</u>	<u>GIFT RANGE</u>	<u>CATEGORY TOTAL</u>	<u>CUMULATIVE TOTAL</u>		
1	\$125,000+	\$125,000	\$125,000	9%	
1	50,000-99,999	94,000	219,000	7%	
7	25,000-49,999	208,000	427,000	16%	
	9 gifts @ \$25,000+				32%
19	10,000-24,999	265,000	692,000	20%	
13	5,000-9,999	75,000	767,000	6%	
	41 gifts @ \$5,000+*				58%
179	1,000-4,999	342,000	1,109,000	26%	
162	500-999	99,000	1,208,000	7%	
	382 gifts @ \$500+**				91%
850	1-499	129,000	1,337,000	10%	
	1,232 total gifts				100%***

Notes

* 3% of all gifts bring in 58% of all dollars
 ** 31% of all gifts bring in 91% of all dollars
 *** does not equal 100% due to rounding

The chart reveals a number of important trends in ARDF's contributed income. Following notes about these issues, a proposed Table of Gifts is provided to help ARDF set its goals for the various levels of annual giving.

Comments about giving trends:

1. A significant contributor provides a tenth of the annual giving. Praise the Lord for such generosity. However, should that donor stop making that gift, there will obviously be a

large hole in the numbers. ARDF will want to target and cultivate other major contributors toward expanding the number of highest-tier supporters.

2. One donation is received in the \$50,000 - \$100,000 range, yet the Consultant believes that several other such gifts are very possible.
3. Seven gifts of \$25,000 and above is a very good indication of major support for ARDF's work, yet there could be more donors in this range, as well.
4. Note that 4% of donors (50 total units) contribute nearly 60% of the annual support. It is in light of this significant reliance on these few major givers that ARDF has initiated the new trustee-major donor effort.
5. An old rule of thumb is to aim for 10-20% of annual donors to contribute 80-90% of the total gifts received. ARDF, in round numbers, has almost 20% of its donor base contributing about 85% of its support. That is quite acceptable, but still allows for growth of high-end donors to help ensure sustainable income in support of the mission.
6. Looking deeper at annual giving from 2016 through 2018, similar numbers appear and fortunately, no notable variances. That means that support has been fairly steady and certainly reliable.
7. Finally, the broad base of support through smaller annual gifts (less than \$500) is very good. There will always be those who cherish what ARDF does and yet can only give modest amounts in support. However, each and every gift represents a heart that wants to help. And for some foundations, organizations, and companies the larger the donor base the better the indication of the organization's strength and proven record of using gifts well. It is a leveraging effect and a positive factor in securing and retaining contributors.

What is Considered a Leadership Gift for ARDF?

Reviewing the giving trends of the past three years, it seems that an annual gift of \$500 or more would be considered a "leadership gift" to ARDF. That seems to be something of a threshold, above which the number of donors begins to quickly drop off.

The Consultant suggests that recalibrating the leadership threshold to \$1,000 and above will dramatically improve the total annual support that is received. A later section of this plan reports and analyzes results of the staff/trustee survey. That effort indicated agreement that \$1,000+ is an appropriate target to begin categorizing a gift as "leadership."

Thinking long term, 10 – 15 years from now others then in charge of ARDF will start listing leadership gifts as perhaps \$1,500 and above. Presently, ARDF has moved into a size of operations where it needs to communicate that increased annual support is vital if it is to sustain the worldwide reach of its mission as well as to continue growing in the breadth and depth of its good works.

IV. ANNUAL GOAL TABLE OF GIFTS

A Table of Gifts (“the pyramid of giving”) has a strong Scriptural foundation: To whom much has been given, much is to be expected. As well, it provides a “road map” for ARDF and its donors to see the path that leads to success in meeting the annual support goal. Finally, it lets donors know the levels of support that must be attained, from smallest to largest amounts, if ARDF is to meet its budget targets.

The Consultant proposes the following chart as a starting point for ARDF beginning next fiscal year. Some adjustments may well be made as staff assesses realistic prospects and available resources. However, these levels of support generally can lead to both meeting the overall goal and securing increased giving in the specific gift ranges.

TABLE OF GIFTS			
<u>Target Goal: \$1,500,000</u>			
NUMBER OF GIFTS NEEDED	AMOUNT OF EACH GIFT	CATEGORY TOTAL	CUMULATIVE TOTAL
1	150,000	150,000	150,000
1	100,000	100,000	250,000
2	50,000	100,000	350,000
10	25,000	250,000	600,000
25	10,000	250,000	850,000
40	5,000	200,000	1,050,000
60	2,500	150,000	1,200,000
100	1,000	100,000	1,300,000
	<i>(238 leadership gifts)</i>		<i>(87%)</i>
200	500	100,000	1,400,000
Many less than	500	100,000	1,500,000

Total number of donors: about 1,500. Although this would be a dramatic 20%+ increase from the 2018 total of 1,232, it is more important to work toward moving up current donors than meeting such a big leap in new donors. In time, the donor base should be able to grow to 1,500+.

V. DEVELOPMENT SURVEY RESULTS AND ANALYSIS

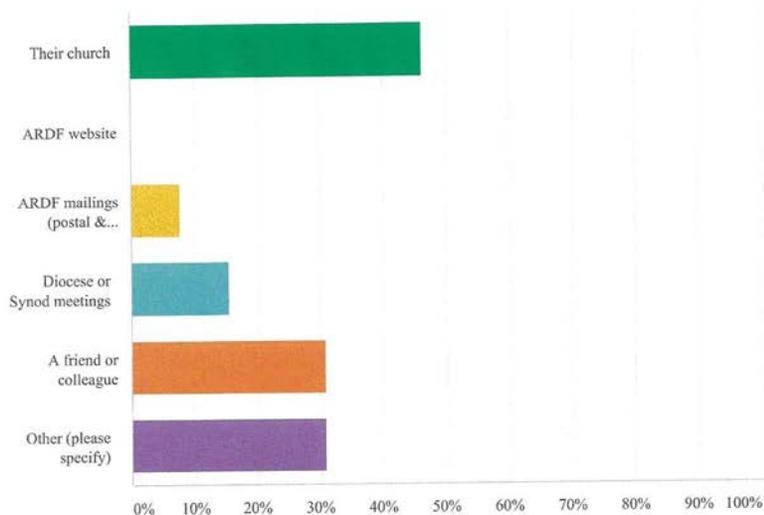
1. How do you think most of our donors learn about ARDF?

5/27/2019

SurveyMonkey Analyze - ARDF Board Survey

How do you think most of our donors learn about ARDF?

Answered: 13 Skipped: 0



ANSWER CHOICES	RESPONSES	
- Their church	46.15%	6
- ARDF website	0.00%	0
- ARDF mailings (postal & email)	7.69%	1
- Diocese or Synod meetings	15.38%	2
- A friend or colleague	30.77%	4
- Other (please specify)	Responses 30.77%	4

Total Respondents: 13

Do you think most North American Anglicans know and understand ARDF's mission?

Answered: 13 Skipped: 0

Findings

- a) *It is clear that ARDF is currently exposed to potential donors through the church to which they belong. And as would be typical for nearly any non-profit organization, word-of-mouth plays an important role in letting potential contributors know about the opportunity for support.*
- b) *It seems a bit surprising that more donors would not learn about ARDF through attendance at larger Anglican gatherings. Perhaps that indicates that those who attend such meetings may for the most part already be aware of ARDF, or it may be that ARDF could be more overt in promoting itself at these events?*
- c) *The challenge for ARDF's staff is gaining entry into churches where obvious and likely donors are members. The leadership (both ordained and lay) of each congregation has to be educated first and then permit ARDF representatives to make direct presentations and/or deliver appropriate literature. Ideally, announcements from the pulpit as well as in church publications would help further sanction and endorse the work of ARDF, thereby gaining wider acceptance among Anglicans toward contributing.*
- d) *Through work with another Anglican project, the Consultant recognizes the challenge of getting church and diocese leadership's attention and cooperation for connecting ARDF with individual donors in their purview. Most likely, Anglican leadership at the very top of ACNA will need to further help endorse and promote financial support of ARDF among the faithful in the denomination. On that note, one respondent commented that donors learn of ARDF "when [Archbishop] Foley Beach elevates it for natural disaster relief."*
- e) *Also mentioned were social media, the ARDF board, and relief events.*

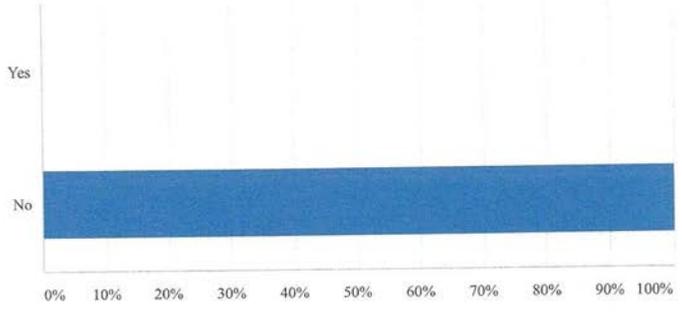
Recommendations

- Establish policies and practices with ACNA, synodal, and diocesan leadership to help make Anglicans aware of and interested in considering financial support for ARDF. Clarify that ARDF is a direct mission outreach of ACNA and as such, should be carefully and prayerfully considered by each congregation and its individual members for regular, ongoing support.
- Create a list of Anglican churches within ACNA by two primary sort factors: number of members and existing connectivity to ARDF. The larger the church, the greater the impact of efforts to help donors become more aware of ARDF. Where there are already connections, such as a trustee, missionary, or donor, work through those relationships toward building a stronger tie to the whole church – no matter how big it is. These two factors – size and connectivity – help ARDF get the “biggest bang for its buck” (a stronger Return on Investment) for its development efforts.

2. Do you think most North American Anglicans know and understand ARDF's mission?

5/27/2019

SurveyMonkey Analyze - ARDF Board Survey

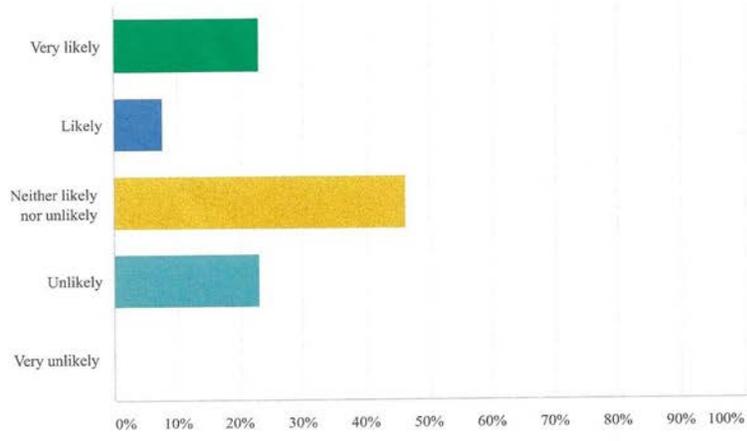


ANSWER CHOICES	RESPONSES	
- Yes	0.00%	0
- No	100.00%	13

Total Respondents: 13
Comments (4)

Should we expect financial support from non-Anglicans?

Answered: 13 Skipped: 0



ANSWER CHOICES	RESPONSES	
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Findings

- a) *No question that survey participants believe that ARDF's mission is far from being known and understood within ACNA.*
- b) *A point to ponder is what the "market penetration" might actually be. For example, if there are 200,000 Anglicans who are members of ACNA, then ARDF's donor base is just over one-half of one percent of the potential market for contributors. Were it a for-profit business with such geographical dispersion of customers, serious discussions would be underway about re-orienting marketing practices to a more closely defined audience of potential customers. For ARDF, the key is to focus on specific congregations from which to build outwardly.*
- c) *Comments included:*
 - *"Churches that are open to foreign missions already have ties / commitments, are reluctant to focus on another country. Small / church plants do not feel they have the funds to support ARDF. The church tends to follow the lead of the rector, some rectors do not give ARDF time from the pulpit.*
 - *"I think it depends on where you live and if you are a new to Anglicanism. There are a lot of Church plants happening with people who know nothing of what other Anglicans take for granted."*
 - *"No. I think they see us as a relief option."*
 - *"I believe that we have laid a solid foundation, but now is the time to raise the bar of awareness with perhaps our staff being present at synods as often as time and finances allow."*

Recommendations

- ARDF is "spread thinly" in terms of identifying, knowing, and partnering with its potential supporters. It currently has to provide a continent-wide effort to attract and retain donors. It will be best served to look for clusters of its donors and work outwardly from those locations. By building where there is already a foundation laid, new walls go up much faster and are more likely to withstand the inevitable winds over time.
- The Consultant has recommended, earlier in this document, a suggested process for creating working teams at local levels that can take the lead in identifying and educating friends and colleagues (fellow Anglicans) about ARDF.
- Conceptually, ARDF's development efforts should concentrate on building targeted bases of support in smaller pools of water, rather than broad outreach attempting to throw big nets out over an ocean. "People give to people," so working toward building on existing connectivity will bring greater results.

3. Should we expect financial support from non-Anglicans?

(See previous chart.)

Findings

- a) *Almost a third of respondents think non-Anglican support is likely or very likely.*
- b) *Almost half do not see it as either likely or unlikely.*
- c) *The remaining ones do not think non-Anglican support should be counted on.*
- d) *Comments included:*
 - *“Not a bad thing to talk about...Matthew 25 Initiative is all non-Anglican money...”*
 - *“Except for REC churches and other orthodox Episcopalians”*
 - *“Other Christian denominations may have the desire to fund relief/development projects, but without a specific denominational group in which to give. It's all about building and serving the Kingdom of God.”*
 - *“There are people other than Anglicans who will support worthy projects: education, medical, water, employment, the list goes on and on. ‘Where doctrine divides service unites.’ I was involved in a mission that had volunteers who were Anglican, Episcopal, Methodist, Roman Catholic, Baptist, Presbyterian, non-Denominational and Jewish involved. It a matter of the heart.”*
 - *“I think only by referral.”*

Recommendations

- Of course when there are projects that offer readily shared opportunity to cross denominational lines, it is in everyone’s best interests (especially those who are being served!) to do so. The Consultant, however, continues to believe that the overwhelming majority of contributed support for ARDF will naturally come from fellow Anglicans, and mostly among those who also reside in North America.
- Development efforts focused on most likely populations of prospective donors always result in greater outcomes (number of donors, dollars raised, donors retained over time, etc.). Therefore, ARDF should continue to spend most of its development resources on Anglicans and allow for non-Anglican support when it happens, but not because it is so specifically sought.

4. In your opinion, who should make the ask for ARDF financial support? (Check all that apply.)

5/27/2019

SurveyMonkey Analyze - ARDF Board Survey

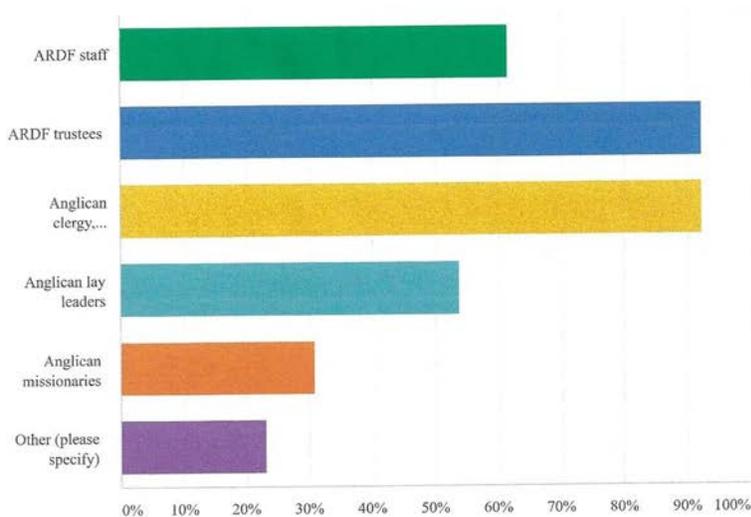
ANSWER CHOICES	RESPONSES	
- Very likely	23.08%	3
- Likely	7.69%	1
- Neither likely nor unlikely	46.15%	6
- Unlikely	23.08%	3
- Very unlikely	0.00%	0

Total Respondents: 13

Comments (5)

In your opinion, who should make the ask for ARDF financial support? (Check all that apply.)

Answered: 13 Skipped: 0



ANSWER CHOICES	RESPONSES	
- ARDF staff	61.54%	8
- ARDF trustees	92.31%	12
- Anglican clergy, including Bishops & Archbishops	92.31%	12
- Anglican lay leaders	53.85%	7

Total Respondents: 13

Findings

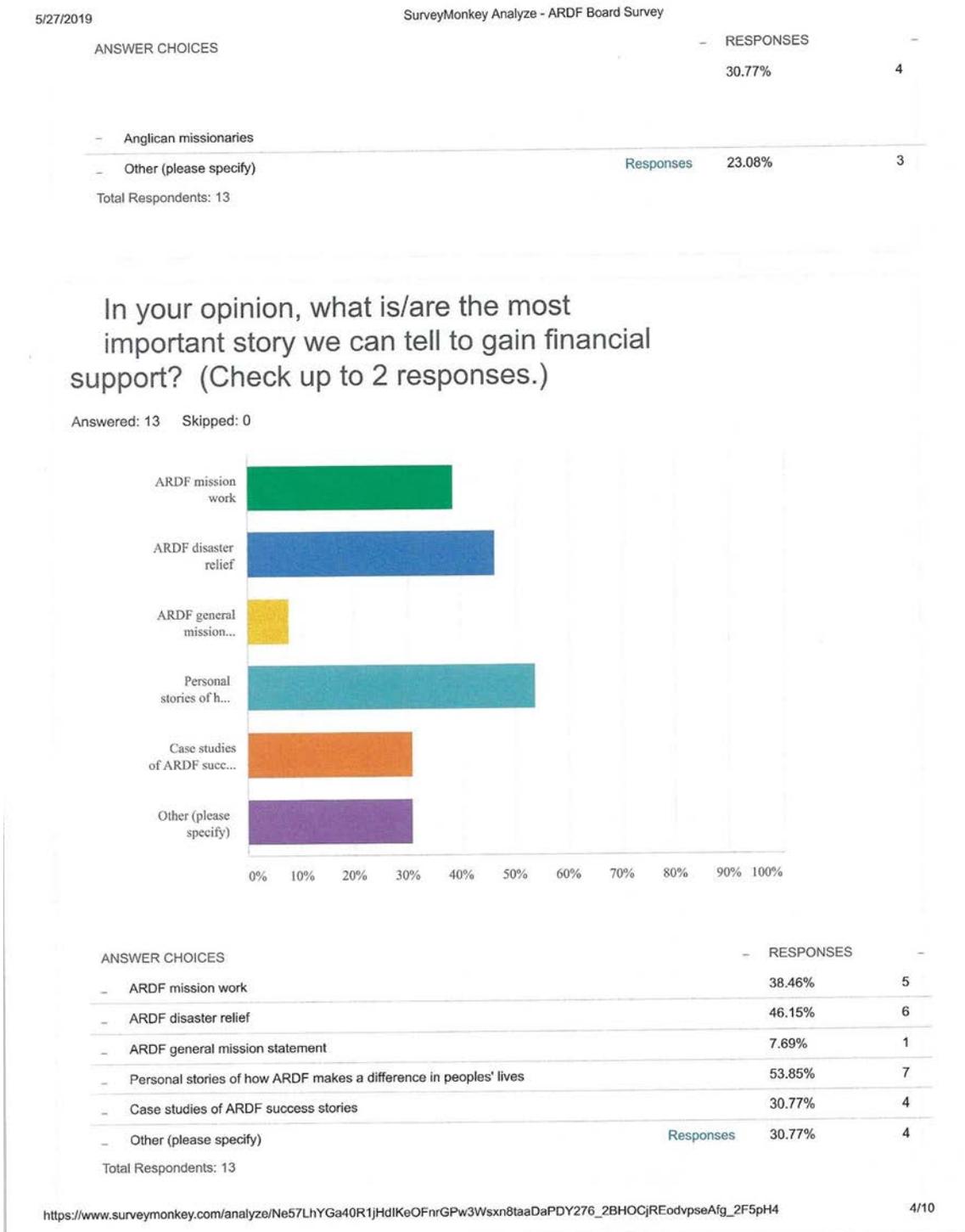
- a) *Survey participants see three primary groups as the most appropriate to solicit funding support: ARDF trustees (92%), Anglican clergy (92%), and ARDF staff (62%). Anglican lay leaders come closely next in line (54%).*
- b) *Generally, donors respond best to other donors who are not paid staff. There are certainly regular exceptions to this guideline, but it should be remembered that one of the principle responsibilities of a board member is always to help ensure the financial well being of the organization. For ARDF, much work lies ahead to shift the trustees' paradigm from one of "advise and consent" to "advise and participate." Trustees' active and sustained efforts at actually making the ask will have the single greatest impact on ARDF's long-term increase in annual support.*
- c) *Due to the religious nature of ARDF's work, and that it is indeed an integral component of Anglicans' response to "go into all the world" and to serve those less fortunate (including disaster relief), it is absolutely imperative that a strong relationship is built and maintained between church clergy and ARDF. Every effort should be made to reach all rectors and key congregational personnel, helping them fully understand and appreciate ARDF's mission and relationship to ACNA, and enlisting their direct assistance in reaching their individual church memberships with requests for funding support.*
- d) *The Consultant knows that church leadership often senses – or even experiences – competition for dollars when an "outside" cause is put before its members. Especially true the smaller the church. However, if ARDF is to be the or at least a primary worldwide mission-funding agency for ACNA, it must rely on full cooperation and collaboration with local ministry leadership. ARDF support needs to be positioned as "in addition to" support of the local church, not as a replacement or substitute for it.*
- e) *Comments included:*
 - "Very important for Executive Director to cultivate major donors with the Archbishop's help"
 - "Anglican missionaries if they are involved with an ARDF project in their location could ask, but much of the time, they are seeking their own personal support for their work."
 - "Those who see a need should make a case for supporting a project."

Recommendations

- Continue to instruct, equip, and inspire ARDF trustees to play active roles in the identification, evaluation, and solicitation of donors, particularly leadership-level donors of \$1,000 and above.

- Seek ways to build ongoing relationships with rectors and local congregational leadership, who can help “open doors” for ARDF at that foundational level of support. ARDF must find ways to reach individuals and families within ACNA, for it is individuals who will always provide the bulk of ARDF’s annual support.
- It is wise to have a visible and engaged presence for ARDF at synodal events, as well as diocesan meetings whenever feasible. As previously stated, these should be concentrated where there is already a demonstrated core of support for ARDF. Putting such a face on the organization will result in more donations and retained donors over time.
- Note that ARDF, to the Consultant’s knowledge, does not yet really utilize any network of volunteers who can be ambassadors for ARDF. As noted earlier, building local teams who can spread the message and make the ask will directly benefit ARDF’s development work.

5. In your opinion, what is/are the most important story we can tell to gain financial support? (Check up to 2 responses.)



Findings

a) *Personal stories of how ARDF makes a difference in peoples' lives is and should be the best story to help donors appreciate the value of supporting ARDF. Donors want to*

- know that their gift is making a significant difference for the betterment of someone else's life or circumstances. ARDF indeed does make such differences, and first-hand stories about them compels donors to be generous.*
- b) *It is clear that when a natural or other disaster impacts many lives, almost every other human being desires to respond generously in order to help. Anglicans are no different and fortunately have ARDF, which provides an outstanding and fully accountable means of providing such support in order to do the most good.*
- c) *A significant number of respondents also cited the importance of relating ARDF's mission work in order to help inspire donors to give generously. The Consultant sees in the promotional materials produced by ARDF staff a very good balance of personal stories, case studies, and mission explanations. Saying what's happening, how it can be helped, and the positive difference a gift will make toward that help is a winning strategy. Kudos to staff for doing this task especially well.*
- d) *The Consultant acknowledges his misnomer for ARDF's worldwide efforts. As well noted by survey participants, it should be stated as "development projects" rather than "mission works." While development projects by nature will provide mission opportunities, the latter does not necessarily include the former. Point well made.*
- e) *Comments included:*
- "Disaster relief sells itself"
 - "ARDF does not have 'mission work' in the traditional sense. A better term would be 'ARDF Development Projects.' However, to answer the question - Personal stories are always the most powerful."
 - "ARDF Mission work is not a term for ARDF. Maybe it should be ARDF Development Projects?"
 - "Tell the process and show the results"

Recommendations

- A general disaster relief fund should be built upon, rather than always just responding to a specific incident. While somewhat more challenging for which to seek funding, a general fund on hand will provide staff with more immediate response capacity. ARDF does maintain such a reserve, but the Consultant suggests working to enlarge it to a targeted minimum amount to have on hand when needed on very short notice. However, it should be a working reserve, not an endowment. If the last penny is called for in response to a particular situation, then the fund can be built back up later after the relief has been provided. This is a good discussion point for trustee committees and staff.
- No other specific recommendations in this area, beyond continuing to do the fine promotional work that staff is already doing.

6. What do we do well that helps build strong and sustained support for ARDF?

Findings (responses)

- *connecting with current donors*
- *Emphasize successful projects because we have boots on the ground overseas. Much less chance for screw-up.*
- *Stories and videos*
- *Proven Partners*
- *Most of our projects dramatically change lives. People are faithful to that vision so folks who donate to us tend to repeat - if they are asked!*
- *people to people communication, or individual conversations; reputation of handling finances well to those in need;*
- *We are able to reach the poorest of the poor through the Anglican communion, which is a strong differentiation versus other charities.*
- *We have an incredible staff that is doing a terrific job with social media and videos. Telling the story of how lives are changed because of God's provision via ARDF is great! Asking the trustees to be more involved was an excellent move!*
- *Build relationships*
- *I know we have a proven partners community.*
- *Communicate with our Proven Partners and Advocates.*
- *Partnerships and Relationships*

Recommendations

- *Involve trustees more regularly in the identification and solicitation of donors.*
- *Build on Proven Partners by incorporating the broader array of suggested giving levels, including providing levels that evenly divide into twelve months of payments (e.g., by credit card).*
- *Continue to share stories!*

7. What could we do better to build strong and sustained support for ARDF?

Findings (responses)

- *Ask more! Elicit more high-end donors, through connections with existing donors/trustees, etc.*
- *Talk to clergy and church outreach committees over and over.*
- *Having a small wedge (e.g. 1%) in church budgets for ARDF would likely go a long way to raising awareness and building a broader donor base.*
- *Educate our bishops regarding our work. Work from the top down asking for their suggestions for donors. I understand that many ACNA churches are very small, but being able to introduce the idea of serving as well as mission through ARDF and having it come as a suggestion from a bishop would make a difference. Perhaps even having staff members make personal face to face calls on bishops to let them know of our work.*

- *Work with local clergy to tell our story. Christian grants! Join others with the same focus*
- *Reach out to a younger community, like the Pittsburgh Fellows, who are growing as business leaders. To gain their trust and support now, although they may not be able to give huge amounts, will result in long term sustainability when they are able to increase their giving.*
- *We could phone donors. We could visit churches during their synods. Spend a few days around that area and try and get in front of the larger churches mission committees.*
- *Keep telling our story to a wider and wider audience*
- *Speak in churches*

Recommendations

- Participants understand ways that ARDF can better reach its current and potential donors. Those listed above all make good sense. The only caution is to move methodically and in measured steps. Overstepping existing resources, especially staff time and support, would not be sustainable.

8. Based on your experience, how well do we thank donors?

5/27/2019

SurveyMonkey Analyze - ARDF Board Survey

cultivation of major gifts; elevation from Archbishop and Bishops to the clergy and parishes

5/22/2019 5:59 PM

[View respondent's answers](#)[Add tags -](#)

speaking in churches - more awarenesses

5/21/2019 7:43 PM

[View respondent's answers](#)[Add tags -](#)

Connect with donors, particularly ones that are new (and of those, particularly those donating for disaster relief).

5/21/2019 9:34 AM

[View respondent's answers](#)[Add tags -](#)

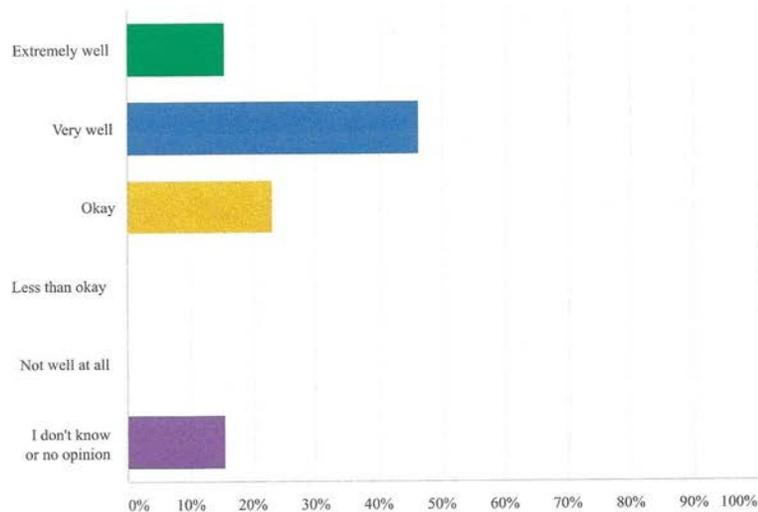
Dramatically increase visibility from the top of ACNA and internationally.

5/20/2019 9:57 PM

[View respondent's answers](#)[Add tags -](#)

Based on your experience, how well do we thank donors?

Answered: 13 Skipped: 0



ANSWER CHOICES

RESPONSES

https://www.surveymonkey.com/analyze/Ne57LhYGa40R1jHdIKeOFnrGPw3Wsxn8taaDaPDY276_2BHOCjREodvpseAfg_2F5pH4

6/10

Findings

- It is most encouraging that nearly two in three respondents believe that ARDF does very or extremely well in thanking donors. The Consultant concurs.*
- Even that a fourth of survey participants believe ARDF thanks donors in an "okay" manner is still better anything less – and nobody rated it less.*

- c) *The Internal Revenue Service requires acknowledgement of donations, but ARDF understands that making sure donors feel personally thanked and appreciated is what really counts.*
- d) *Comments included:*
- *Cards and phone calls are fine. Not sure they want or expect more than that.*
 - *Much better than we used to!*
 - *I don't have any experience for churches, but my personal letter of thanks is done well.*
 - *Donor care is very important. There is no quick answer. A group of trustee and staff should focus on donor care.*
 - *We send a nice letter or email to every donor that requests communications that way. We have also tiered who on staff responds to donations larger than 500.00, so they will get a handwritten note or phone call in addition to the letter or email receipt.*

Recommendations

(None)

9. What would you consider as a leadership-level annual gift commitment?

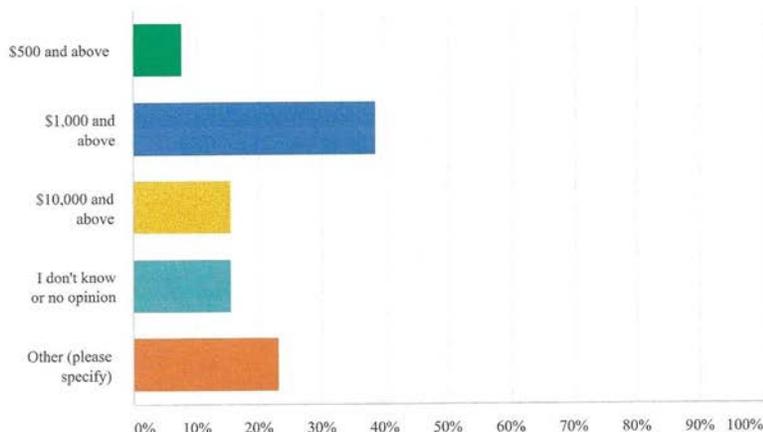
5/27/2019 SurveyMonkey Analyze - ARDF Board Survey

ANSWER CHOICES	RESPONSES	
- Extremely well	15.38%	2
- Very well	46.15%	6
- Okay	23.08%	3
- Less than okay	0.00%	0
- Not well at all	0.00%	0
- I don't know or no opinion	15.38%	2
TOTAL		13

Comments (5)

What would you consider as a leadership-level annual gift commitment?

Answered: 13 Skipped: 0



ANSWER CHOICES	RESPONSES	
- \$500 and above	7.69%	1
- \$1,000 and above	38.46%	5
- \$10,000 and above	15.38%	2
- I don't know or no opinion	15.38%	2
- Other (please specify)	23.08%	3
TOTAL		13

https://www.surveymonkey.com/analyze/Ne57LhYGa40R1jHdIKeOFnrGPw3Wsxn8taaDaPDY276_2BHOCjREodvpseAfg_2F5pH4

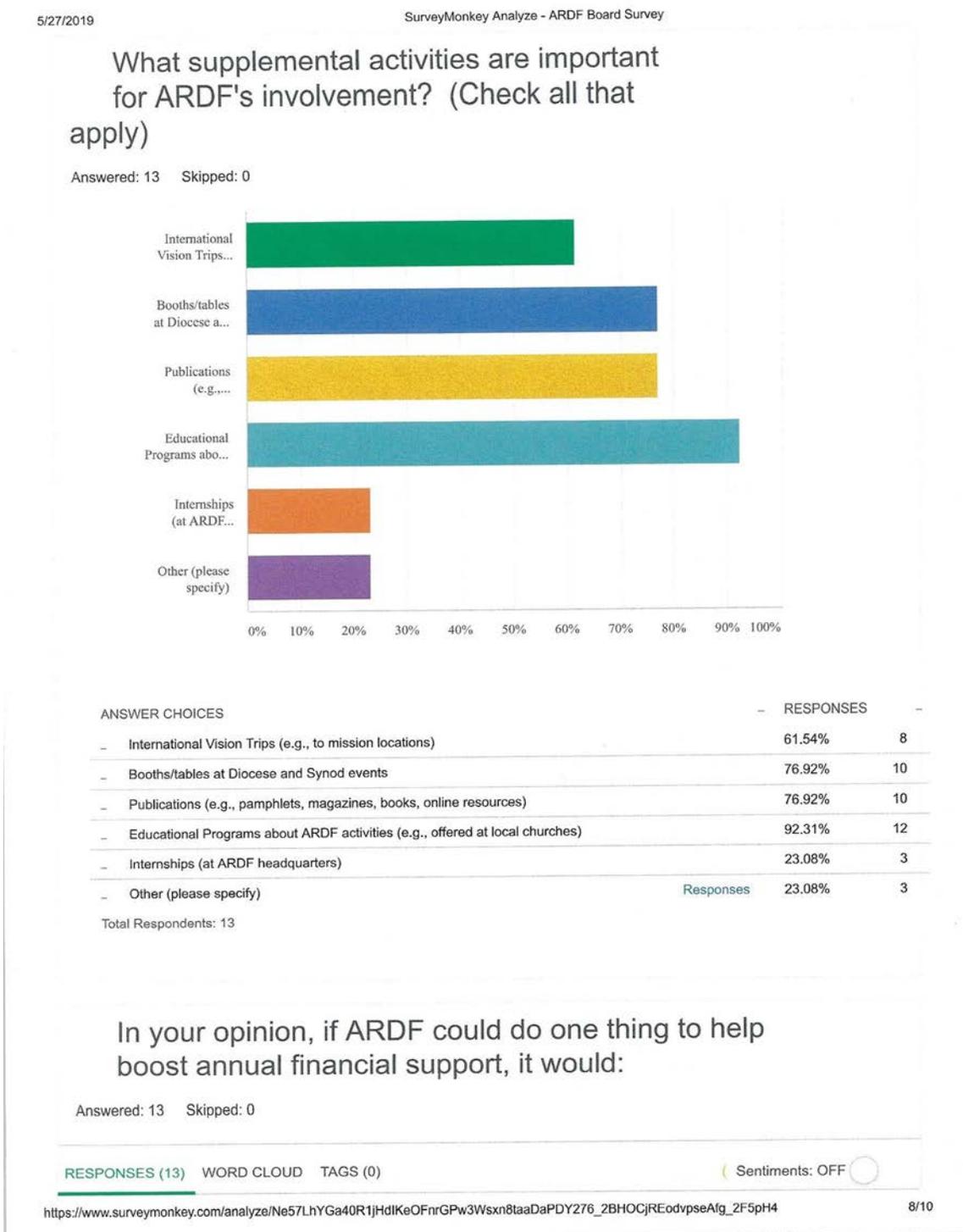
7/10

Findings & Recommendations

- This point was previously discussed under Table of Gifts. The Consultant finds that the survey results back the idea of considering \$1,000 and above as a “leadership gift” and helps raise the bar for how donors begin to think about major support for ARDF.

- Comments included:
 - *“Are you meaning trustees, or church leadership?”* [Both]
 - *“In the life of the ACNA at this time, probably \$5,000.”* [An excellent suggestion, but perhaps aiming a bit high from where giving trends are currently.]
 - *“I think it should be substantial. You will talk about something you give sacrificially. And you are sheepish about what you only serve on. (in my experience)”*

10. What supplemental activities are important for ARDF’s involvement? (Check all that apply.)



Findings

- a) *Nine out of ten think that educational programs about ARDF activities, such as at local churches, are important for ARDF to utilize.*

- b) *Three out of four add that booths or tables at Diocese and Synod events as well as publications (such as pamphlets, magazines, books, and online resources) are important.*
- c) *It cannot be emphasized enough that more than 60% of respondents also listed international vision trips (e.g., to mission locations). The old adage holds true: A picture is worth a thousand words. But this Consultant adds that a site visit is worth a thousand pictures!*
- d) *Comments included:*
- *“Personal meetings to talk ARDF success stories.”*
 - *“All are important. Bishops focusing and driving ARDF to the local clergy and laity would be a big help. Clergy will follow the bishop. An ARDF focus group in each diocese would help.”*
 - *“We are not getting the word out. We need to be speaking in churches every week.”*

Recommendations

- Again, localizing the promotion of ARDF through more regional if not congregational ambassadorial teams will help provide sustained, personalized connection between prospects, donors, and the organization. There is simply no substitute in fund raising for visiting with a prospect in person.
- Participation in Anglican events (e.g., diocese, synod) can only help spread the message and bring more results. However, its limitation is that either group remains a step or two away from the actual individual donors with whom ARDF must partner for long-term support.
- Another means of accomplishing a goal of publications is to seek opportunities to feature ARDF development and disaster relief efforts in outside publications (magazines, newspapers, etc.) This would most likely require at least a part-time staff position to develop relationships with those who produce such publications, to create stories to fit those organizations’ interests and needs, and to manage the process of actually getting ARDF stories published. The very good news is that even a few such stories exposes ARDF’s great efforts to all-new and broader audiences.
- The vision trips have proven to be very popular (for those who can afford to participate, of course), and they play right into the potential major gift donors that ARDF wants to connect with. Ideally, a schedule of such upcoming trips would be available for the next couple of years, so that people might have adequate time to plan for their participation on a journey where they have interest.

11. In your opinion, if ARDF could do one thing to help boost annual financial support, it would:

Findings (responses)

- *Executive Director cultivating major donors*
- *Get ACNA churches to include ARDF in annual outreach budget.*
- *Get the ACNA Bishops and the Archbishop to promote ARDF to churches/dioceses.*
- *Get talked about by people like Archbishop Beach.*
- *Ask more especially higher end donors. With personal meetings by other donors or trustees.*
- *Meet with more churches personally.*
- *Strategically select trustees to have strong representation across dioceses in ACNA.*
- *Personal calls to potential donors---telling our story and then asking!*
- *Get a list of individual and group philanthropists and work the list. Those lists do exist.*
- *The internship idea is interesting. Would that help to expand our reach with young people (such as the Pittsburgh Fellows) and therefore we would reach more donors through them? Would that boost annual financial support long term if they have a great experience with ARDF?*
- *Target churches and build relationships. It would also [help to] start to visit the disaster sites a bit after a disaster to meet the players on the ground and get pictures and testimonies. We need to be out in the field.*
- *Expand our Proven Partners. Monthly support.*
- *Convince Bishops to push Rectors to allow ARDF board members to speak in church on Sunday!*

Note: Nine (9) trustees and four (4) staff members participated in the survey. Individual responses remain confidential.

VI. EFFECTIVE SOLICITATION OF DONORS

SUGGESTIONS FOR SOLICITING ANNUAL LEADERSHIP GIFTS

1. ***Learn about the annual fund campaign: Know what is important to you personally.***
Be well informed. Carefully review the information about the annual fund campaign - what is the need, whom will it help, when do pledges need to be paid by, why is it important? Find something personal you can say about it. If you have questions, ask.
2. ***Make your own commitment first: Do what you are asking others to do.***
Thoughtfully consider your own financial commitment to the fund drive and make *your pledge* of support before you solicit others' gifts. Your personal commitment to the campaign will make you a far more effective solicitor. Fill out your own pledge card and return it right away. Our goal is 100% participation by campaign volunteers.
3. ***During the next week: Set up appointments to see your prospects within two weeks.***
A personal appointment is the only consistently effective way to ask for someone's support. People do not give to causes; people give to people with causes.
Please set up appointments to **see your prospects in person.** Letters, telephone, & e-mail solicitations only invite inadequate gifts and pledges, delays, and especially refusals. You have no reason to be apologetic or hesitant about making an appointment - you are providing an opportunity for the prospect to do something significant and important for our organization and our community.
 - Set a target date by which to set up your prospect appointments.
 - Set a target date by which to have met in person with all of your prospects.
4. ***Look for maximum pledges: Ask for a specific suggested pledge amount.***
If your prospect has been evaluated already, ask for the suggested amount. If not, use your judgment and decide in advance on an appropriate pledge to request. Remember, the prospect needs and wants your guidance. He or she is asking "What should I give? What is appropriate in light of what others are doing?" You might try this approach:
"We are raising \$_____ this year and are hoping you will consider a leadership pledge of \$_____. You can pay your pledge over a period of up to 12 months. It would help us reach the goal if you can pledge that amount, but if you cannot, we'll appreciate whatever you can give. How can I help you reach a decision?"
5. ***Be flexible on the nature of the pledge: Remember, pledges paid over time are best.***
Be flexible on the amount, the payment terms, and the source of the pledge.
 - a. Many prospects will be willing to consider making a pledge over a period of up to 12 months (check, bank draft, credit card); in fact, that has been proven to help achieve maximum gifts. This is ARDF's Proven Partners approach.
 - b. However, many prospects will wish to make a one-time commitment. There are some who may be able to provide a gift of in-kind (non-cash) support, and this should be discussed with the Executive Director.
 - c. Some prospects may find it helpful to schedule their payments beginning in a later month, quarterly, or later in the fiscal year. Some may want special payment terms. Be flexible. Make it "donor friendly"!
 - d. Sometimes people prefer to give through their own business; sometimes, individually. Make sure the information on the pledge card reflects the source of the gift.

(continued)

SOLICITING ANNUAL LEADERSHIP GIFTS, continued

6. ***Wrapping up the call: Asking for the commitment.***

You may appreciate some effective tips for bringing closure to the call:

- Review benefits to the people who are being helped by the organization.
- Review areas of agreement and shared excitement.
- Address any concerns or areas of disagreement, turning them around if possible ("I used to think that until I learned...").
- And be sure to ask again or to confirm the commitment for the specific amount you've mentioned: "Joe/Jane, can we count on you for a pledge of \$_____?"

7. ***Follow up within a week to ten days: Don't leave unfinished business behind.***

The key to a successful annual fund campaign is following up with your prospects.

Encourage the prospect to complete his/her pledge card on your first visit. Either you or the prospect can return it by mail to the organization. If the prospect wants more time, *set up a good time for you to follow up*. Your job as solicitor is completed when each of your prospect's cards is in - either with a pledge or with notification that a pledge will not be made at this time. Regular report sessions are scheduled to help track progress. We can provide reports on cards which have been received.

- The purpose of the report sessions is to encourage one another and to receive helpful tips & suggestions from other campaign volunteers & staff.
- If you cannot attend a session, please forward a report on your progress to us.

8. ***Be enthusiastic: Show how important this is to you for us to succeed in our goal.***

Someone has said: "Money is not given, it has to be raised; money is not offered, it has to be asked for; money does not come in, it must be gone after."

You are offering your prospects the opportunity to invest in an important annual drive for one of our community's best resources. Be enthusiastic. Let your commitment show.

(Even if your prospect does not make a pledge, you are helping more people understand the important work of the organization. Remember: we are always as much in the business of "friend-raising" as "fund-raising.")

9. ***All pledges will be acknowledged: We appreciate every level of support.***

The office will formally acknowledge all pledges and gifts soon after we receive the pledge card or gift. This will confirm the amount and terms, and serves as formal confirmation for the prospect's financial and tax planning.

10. ***Go the extra mile: Send a personal note of thanks.***

You can send a brief, personal thank-you note as well. This has been proven to be the most effective goodwill tool for a not-for-profit organization. And if the prospect has declined to pledge, also send a note of thanks for their time and interest.

ANNUAL APPEAL LETTER SUGGESTIONS

1. Compelling and concise wins every time – as many words as are needed but as few as possible!
2. Start with a punch – a brief phrase, a heartfelt plea, or something which grabs the reader’s attention immediately.
3. The P.S. is critical – many say the most important part of the letter; use it to call the reader to action on this request.
4. If photos are appropriate, use them as inserts in the letter; likewise, pull-outs or boxed quotations from clients help to make the case more personal and heartwarming.
5. The donor would rather receive a shorter letter with organizational facts attached (or on the back) than a lengthy prose composition that seems to bog down...what’s the need/how can the donor help is really the meat of the matter.
6. Some like boldface and italics but others do not; use discretion but just don’t overdo these.
7. Best practice says make the ask in the first paragraph, then explain why you are seeking this support (but yes, some people like to “build up to it,” saving the actually request until later in the letter; again that’s a matter of style but experience says donors know you are asking for something and would prefer to know that as context for anything else they read & learn in the letter).
8. Avoid small font size...11 is minimal but 12 is standard; i.e., if it isn’t fitting in the space available shorten the content, don’t shrink the typeface!
9. Finally, there is the ongoing discussion about length of the letter. Most organizations prefer one page...with “breathing room” around the body of the letter. There are those that argue (perhaps persuasively) that if someone is already committed to giving (a renewing donor, in other words), then a longer – even as many as four pages – letter continues to pull them into the story and affirm their sense of commitment. Again, brevity is generally best...one page maximum is a good discipline.
10. Write it, put it aside, read it afresh, let others read and proof it, and only then print it.

Don’t forget to try to make “the ask” *specific*. Can you create different letters with mail merge for individual donors or will this be a “one size fits all” letter? If you can reference their gift last year and ask them for a specific renewal amount at a stated higher level it is most effective. If it’s one letter for everyone, then include some suggested giving levels, e.g.:

“We hope you will consider a generous commitment of perhaps \$1,000, \$500, or \$250. The need for our distinctive services continues to push our resources to the limits and we are counting on our wonderful donors to help ensure that we don’t have to turn anyone away. Whatever you can give, please know just how grateful we will be on behalf of the people we serve every day.”

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“Fundraising is certainly not begging. It’s just the opposite. Fundraising is first and foremost, a form of ministry. It is a way of announcing our vision and inviting other people into our mission. It is proclaiming what we believe in such a way that we offer other people an opportunity to participate with us in our vision.”

Henri Nouwen
Author, Professor, and Pastor