



100 Tips & Tricks for Making Your Small Shop Bigger Faster

Sunday, MARCH 31: 10:45 am – 12:00 pm

GENERAL & VOLUNTEER TIPS

1. While attending the AFP Conference, keep an Action Items list on your phone or written Action Items List sheet; on your way home from the conference, highlight 10 of those action items to implement within 10 days of returning home.
2. *Plan your work and work your plan* - Take the time to create a development plan: create the first draft; share with staff for input; have your development committee review; and forward to Board for approval. (Having a written plan out there for everyone makes it more of a reality.)
3. Recruit a development intern/volunteer from local colleges, Volunteermatch, Idealist, LinkedIn; assign tasks you have difficulty getting around to completing.
- Contact Jim McBride jim@alrp.org for a 10 Week Development Internship Outline template
4. If you have the responsibility, make sure you have the authority.
5. Create a "Paperclip Moment" - paperclip a photo, quote, crayon drawing, article, personal note on Acknowledgment Letters or Direct Mail/email (electronic paperclip).
6. Recognize Staff - recognition is consistently named the #1 benefit employees seek.
7. Add "*Want to volunteer?*," "*Find out about setting up a Donor Advised Fund,*" and "*I would like more information about including XXX Charity to my estate plan*" to reply envelopes/cards and online web donation forms.
8. Don't be afraid to contract out work; consider staff time when considering the cost-benefit analysis of whether it makes sense to hire a grant writer, to have a mailhouse handle stuffing the direct mail envelopes, or to allow an event specialist to handle the details for your annual event.
9. Have a well-designed volunteer program with well-defined volunteer job descriptions, proper orientation, training, and measurable, achievable goals for volunteers - it will be worth the investment of your time.
10. Use the USA Giving Foundation annual report as a guide for how you allocate your time; if 70% of contributions come from individuals and 15% from foundations, then perhaps you should be spending 70% of your time on strategies to gain donations from individuals and 15% of your time writing grants.
11. Use the Memo app on your phone to jot down tips/tricks you discover every day.
12. Consider creating/promoting Donor Advised Funds (DAFs) for your donors (emerging trend in philanthropy): partner with your community foundation or use GrowFund to offer your own products; create a DAF "Get Info" Campaign; make DAF donations a revenue line item for tracking.

13. Reach Guidestar Silver or Gold level; put badge on your web home page, donation pages, social media content (“Good Fundraising Seal of Approval” - adds credibility).
14. Create an AFP binder with all the printouts of session handouts, separated by day and time or session content, with space for notes.

BOARD ACTIVITIES TIPS

1. Clearly communicate to Board members what the non-profit is expecting of them (what we’re counting on you for”), such as annual Board member pledge, major donor prospect names/gifts, sponsorships, sell/buy event tickets, volunteer at events, etc.
 - Recommend providing Board members with a job description (preferably BEFORE they join the Board) that clearly outlines fundraising as part of board expectations
 - Contact Jim McBride jim@alrp.org or James K. Phelps jameskphelps@comcast.net for a Board Member Job Description template
2. Have your Board members make donor/volunteer thank you calls monthly, for first-time donors, on donorversaries, birthdays, Thanksgiving, Valentines Day, etc.; YOU create the monthly list and Board member assignments and distribute to your Board - excellent cultivation tool.
3. Conduct a list review of your donors at the beginning of each year to determine which board members know which donors; use that information to make face-to-face solicitation assignments and to have Board members write personal notes on direct mail appeals.
4. Ask Board Members to host an online giving campaign for 1) Giving Tuesday and 2) a Birthday, Anniversary, or similar event.
 - Recommend using online giving templates to create a guide showing them how to structure their campaign
5. Your Board is often the best resource for increasing your development capacity, but they are often reluctant to help out with “fundraising” - provide your Board with proper training and help them to determine ways that they can support the development function that are within their comfort zones.
6. Deliver a brief development lesson (ten minutes or less) at every Board meeting; topics could include Giving USA statistics, ABC of prospects, fundraising cycle, etc.
7. Try to make sure you are part of the Nominations/Governance Committee to help evaluate Board members through the prism of fundraising.
8. Encourage Board members to join, or befriend a member of, their company’s Corporate Social Responsibility (CSR) Team, which can drive donations, grants, onsite campaigns, etc.
9. Report your progress to the Board using the budgeted amount in each category, amount raised, percentage of goal, AND amount raised at this point last year.
10. Deliver a year-end report showing what each Board member (remove names if you want) PERSONALLY gave and separately what each Board member helped bring in; rank them from highest to lowest.

DONOR ACQUISITION & CULTIVATION TIPS

1. Conduct a Donor Retention Analysis year-over-year; create a campaign to win back lapsed donors; can be as simple as who didn’t donate last year who donated the year before at \$XX+ level, then make them HOT Prospects.
2. Board members need to provide a list of potential new donors, to whom they will write letters or make introductions, EACH YEAR.
3. Conduct a Facebook Donor Profiles Campaign (e.g. monthly) highlighting donor profiles; include a casual photo and brief recap of their involvement with/impact on your non-profit.

4. ALWAYS communicate Campaign status updates and final results with donors and constituents (\$ goal achieved %, number of Campaign gifts, etc.); communicate via email, Facebook and webpage posts, eNewsletters.
 - Recommend this for annual campaigns, Walks, major donor campaigns, sponsorship/event goals, etc.
 - Recommend communicating at least 2 or 3 times during Campaigns AND a post-Campaign result report.
5. Ask for advice, you get a donation / Ask for a donation, you get advice.
6. If you need to build your donor list, have a raffle: the drawing date should be a couple months out from when you start selling tickets; get as many people as possible to sell tickets for you and be sure that the printed raffle tickets request all contact information including name, address, email and phone number; enter all that information into your database as prospects.
7. Use LinkedIn, Facebook, and similar to find your 6-Degrees of Separation from an individual, corporate, or foundation donor.
8. Create a Young Professionals Advisory Board/Committee/Council/Circle to get new/young donor prospects engaged with your organization.
9. Add "*What inspired your gift?*" or "*Would you tell us why you donated today?*" to your online donation form Thank You landing page.
10. Conduct a Facebook Email Address Campaign to solicit constituent emails only.
 - Recommend asking for email address only; do not ask for \$ money
11. Create opportunities for donors to participate with your non-profit; serve on a committee or advisory council, help create content for your Facebook page/website/eNewsletter, special projects, technology assistance, trainings, events, auction.

ANNUAL FUND TIPS

1. Use MS Word function to bold, underline, and red the word "you" when you are editing appeals and communications.
 - Make the Donor/Reader the "HERO" of your communications; if "you" doesn't appear frequently enough, CHANGE APPEAL (make sure to change back to usual font before printing).
2. Segment donors to create custom/tailored appeals:
 - > Top 20 or 50 donors - include #years donating, original donation date, last gift amount, etc.
 - > Segment others by program area of interest, or geography, or lapsed donors, or professional sector, etc.
3. ALWAYS have an ask amount in the letter: "Name, we hope you will consider giving \$250 for..." or "Name, could you give \$250 so that...", etc.; use mail merge to individualize ask based on past giving.
4. Create a plan using staff, Board, and volunteers to thank donors in addition to organizational thank you - you will be amazed at the response from a \$25 donor who gets a call from a Board Member!
5. Create a list of direct mail ADJECTIVES and refer to it when creating direct mailers, email blasts, posts, appeals; include caring, compassionate, fair, friendly, generous, helpful, honest, kind, hero, hard-working, etc.
6. Have someone who knows the donor include a personal note (on the letter or on a post-it note); if no one knows the donor, still have a handwritten note.
7. Use a QR Code generator website to create a Jpeg you can add to letter or envelope to allow donor to scan using mobile phone; QR Code will direct them to your giving page.
8. Use a special envelope to send Annual Fund so donors recognize it is a special mailing.

9. Mark Reply Envelopes to track success of appeals.

EVENTS & SPONSORSHIPS TIPS

1. DO use fund-a-need to pay for an important part of your already existing budget; DON'T create a "special" Fund-a-Need unless there really is an emergency.
2. Do ONE event annually and do it well.
3. Acknowledge key long-term and major donors at events (verbally + in print), not just event honorees.
4. Create a perpetual sponsorship packet (updated annually) that includes general sponsorship, event sponsorship, and program sponsorship for the entire year; send the packets out before a business' fiscal year fourth quarter (that's when many businesses prepare their annual budgets for the following year)
- Note: Different businesses have different fiscal years; find them out from public records.
5. DO spend money for a professional auctioneer; DON'T waste money on an expensive keynote speaker.
6. DO negotiate or have someone who uses space negotiate a deal for event; DON'T pay a corkage fee (or pay as small as possible), especially if you secure a liquor sponsor; DON'T pay an additional room rental fee; DON'T pay a coat check fee; DON'T pay for additional setup time, etc.
7. DON'T pay for or do a 'commission' auction item.
8. DO have a ringer who you know will raise the paddle for the highest fund-a-need amount.
9. DO use online services that are relatively inexpensive for check-in, check-out, payments, etc.
10. DO use your event for Events acquiring new donors, getting publicity, build community and provide an avenue (sponsorships) to solicit businesses.

FOUNDATION GRANTS TIPS

1. Have programs team create a document about each aspect of programs - general info, objectives, etc. - that you can pull text from for various grants.
2. Applying for grants is more than filling out the application - CALL Foundations; Program Officers are paid to talk to you
- If the foundation allows contact, recommend developing a relationship with the program officer to find out more about what they are looking for in a successful proposal.
3. Contract an experienced Grant Writer.
4. Volunteer on a grantmaking committee; you will be better at writing grants once you participate in the review of grants.
5. If/when you can, apply for a multi-year grant to give breathing room.

PLANNED GIVING TIPS

1. Create a Planned Giving Prospects List: if you have a database that allows you to pull a report on lifetime number of gifts, use that report and sort from most to least number of gifts (that's your prospect list for soliciting planned gifts; the number of gifts an individual has made to your organization is a good indicator of their likelihood of making a planned gift).
2. Use an already-existing template to create a Planned Giving packet you can give to donors and on a specific section of your website (google "Planned Giving Packet"); make sure it includes language related to including your org in their will; then do a planned giving acquisition mailing to all donors who have made six or more gifts to your organization.

3. Consider offering a matching present-day gift for each planned gift as an incentive
 - Examples: Your “match” donor will make a \$100 gift to the organization now for every planned gift that is made by a specific deadline.
4. If you have a major gifts society, invite your planned giving donors to appreciation events.
5. If you don't have a Legacy Society, create one - now!

COMMUNICATIONS & SOCIAL MEDIA TIPS

1. The IRS requires you send a Thank You for any gift over \$250 - send one for EVERY single gift you receive, regardless of amount.
2. Create a Fundraising Communications Calendar that includes regularly scheduled and special/promotional email blasts, direct mailers, Facebook posts, web updates, eNewsletters.
3. Set up a series of Thank Yous based on donation level: official thank you letter (with IRS language); personal note from whoever wrote the note on the letter or is connected to donor; a note or call from the Executive Director; a note or call from the Board; and/or a note from someone who receives services.
4. Start meetings (Board, staff, committee) with client success stories - it reminds meeting attendees about the agency's mission and impact.
5. Find out and document donors areas of interest and send them articles and information relevant to their area of interest that may or may not be about your particular organization.
6. Thank your sponsors online prior to events.
7. Don't try to use every social media tool just because it is available - pick the three social media tools that work best to communicate your organization's message and use them frequently.
 - Recommend conducting a Communications Survey with a maximum of 5-6 questions to find out how donors want to communicate with you; sample questions include *“What is the best way for us to communicate with you?”*, *“What social media platform(s)/tool(s) do you use/prefer?”*, *“How often do you want to hear from us? (each month?)”*, *“How often do you visit our webpage?”*, and *“Do you read our eNewsletters?”*
8. Add a “Donation Button” to all appropriate Facebook/social media posts.
9. Ask your web/Facebook donors to share their donation on FB, Twitter, Instagram - it increases donations by an average 18%.
10. Assign Social Media management to someone on staff or a volunteer who really understands social media and who can teach others.
11. Have a designated “photographer” who will take photos and post to your organization's social media accounts, tagging attendees.
 - Recommend only using photos from your organization-NOT stock photos
 - Recommend using photos that encourage the donor/reader to think they could help solve the problem, NOT a photo that shows the problem already solved.
12. Use different “voices” in your communications - Executive Director, Development Director, Volunteer, Volunteer Coordinator, Board member, Staff member, Client, Donor.
13. Conduct a “positive thinking” scan on all your communications; focus on what's working versus the challenge (show your programmatic/community impact, not just the problem/need).
14. Send out the list of companies/corporations that match gifts (send out via email service, as an insert in annual appeal, etc.) to encourage people to have their gifts matched (some won't even know their company does that!).
15. In your Annual Report, list donors “SINCE YEAR XXXX” as opposed to by dollar amount.
 - Recommend you or your Executive Director call top donors “to find out exactly how they want

- to be listed in the Annual Report” as a great non-ask point of contact to cultivate the donor and to create an additional acknowledgment opportunity.
16. Prepare, schedule and send (print, email, post) donor/constituent messages for Birthdays, Anniversaries (first donation, became a member or volunteer, etc.) and Holidays.
 17. Have a “Step & Repeat” (logo photo background wall) at every event and encourage attendees to Post to social media.
 18. Create a Facebook Fundraising Pages Campaign (peer-to-peer fundraising); invite your constituents to conduct a Facebook Fundraising Campaign for your non-profit (like the old school “House Parties”) - e.g. Raise \$1,000 for Non Profit Program/Campaign/Initiative x 50 participants = \$50k FB Campaign goal.
 - Recommend providing templates, sample copy, images and graphics.
 19. Create a “Love Stories Campaign/Series” of articles or stories highlighting donor/client success stories or why donors love your non-profit stories.
 20. SHOW the impact your agency has on the broader community beyond your clients and immediate constituents (partnerships/collaborations, local cost-reduction impacts on poverty/homelessness/access to services, program model replication regionally/nationally, providing volunteer/community involvement opportunities, sponsorships, etc.)

TECHNOLOGY TIPS

1. Make sure your website and Facebook visitors can donate from every page and every post (Donate Now button everywhere) - you never know when inspiration will motivate someone to donate.
2. TechSoup (www.techsoup.org) provides discounted software and hardware for qualified nonprofits.
3. Have a donor database and use a constituent relationship management CRM program that fills your organization’s needs (note: Excel is not a CRM!) - remember, you get what you pay for; free or extremely low-cost software will probably cost you more in the long run. A good place to start is https://www.idealware.org/wp-content/uploads/dlm_uploads/2017/03/IW_DONORMGMT_2017_N TEN_MAY4.pdf
 - Recommend getting one you can reasonably afford, including annual maintenance fees, and that doesn’t have bells & whistles you don’t need. “Don’t book the Queen Mary for a 100 person cruise.”
4. Update your “Donate Now” online donation form/page for desktop and mobile.
 - Recommend starting with brief “emotional story/case”
 - Recommend making “donation frequency” 1st on form, then “donation \$ amount” 2nd
 - Recommend putting \$ amount fields (\$25, \$50, \$100 etc.) on mobile version with \$50 default; Use a Pull-down Menu for \$ amounts on desktop version, with “custom amount” going to a text box/form
 - Recommend minimizing fields/choices (every extra field hurts conversion rates)
 - Recommend deleting “Address Line 2” + “United States” pull down/fields
 - Recommend making ACTION buttons (Donate, Submit, etc.) BIG
 - Recommend taking “field labels” out of fields (can be confusing)
5. Conduct a Donor Survey (e.g. using Survey Monkey) to help focus your fundraising, communications or technology efforts - its fast, and easy, and a great prospect cultivation tool
 - > Ask the donor How they feel?, What they think?, What first brought you to us?, What else can we do for you?, What can we do better?, What inspired your gift?, Why did you donate to us?,

What programs/services mean the most to you?, How was your donation experience?, What can we do to improve your donation experience?

6. Download Adobe Spark on your phone - use it to capture video footage and to make quick, easy videos for posting on your social media outlets.
7. Consider using Text Donations during an event; it costs \$1,000 for the entire event/30-day text campaign versus setting up a \$4,000+ annual text fundraising contract.

SELF MANAGEMENT & TRAINING TIPS

1. Get FREE, excellent training at NextAfter (www.nextafter.com) Digital Fundraising Research Library; samples include Turning Facebook Likes Into Donors, Email Fundraising Optimization, Donation & Landing Page Optimization, Year-end Fundraising for Online Fundraising.
 - Recommend scheduling 1 hour/week to train yourself
 - Recommend reading *13 Proven Ways to Improve your Nonprofit Landing Pages* article
 - Recommend committing to completing at least one (1) 12-module course in the next 90 days!
2. Check out www.sofii.org for fundraising innovation and inspiration.
3. Find a mentor (hint: check out AFP's Mentor Program).
4. Conduct a Return On Investment (ROI) Analysis on YOU - to ensure you are the most productive you can be; consider working out/walking at lunch, meditating daily, getting massages, eating better, getting a professional coach/personal trainer, formally scheduling time for YOU in your calendar each day, etc.
5. Read "*Fundraising for Social Change*" by Kim Klein.
6. Use a Mindfulness App (e.g. Calm, Headspace) daily to keep calm, reduce your stress and gain inspiration.
7. Take credit for what you do; it's ok to share credit, but don't downplay your contributions.
8. Sign up to be an AFP Mentor; you will get more than you give - guaranteed!
9. Make attending the AFP International Conference a part of your employment contract; get your organization to pay membership and Annual Conference attendance.

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