

*In order to better serve our affiliates, the National FCA periodically seeks training on various issues, best practices, and management systems. This article is based on training our office received on successful fund-raising techniques for organizations in the nonprofit sector.*

## **Your One-Year Fundraising Plan**

*for affiliates of Funeral Consumers Alliance, Inc.*

2020

Raising money to make your good work happen is fundamental. No nonprofit can skip over this. Volunteers form the backbone of our mission, but volunteer hours don't pay for your postage, your website, your printed materials, or any of your other expenses.

Fundraising is to nonprofits as sales are to businesses. That is, fundraising is both necessary and legitimate. Nonprofits need money to the same degree that businesses do. Many of us join nonprofits because we care about the cause. We sometimes feel guilty about asking for money, but we shouldn't.

This is why too many nonprofits struggle to fund the basic needs of their modest budget every year. It doesn't need to be this way. The members and donors who belong to your organization want to make a difference in the world and they want to give their money to your organization to make it happen. You're not going to "offend" members. They're not going to tear up their membership.

This guide gives you a simplified one-year plan for fundraising. It relies on direct mail, paper mail, with email "asks" to support it.

Why? Because paper mail fundraising letters outperform email alone. How much? Only 8.5 percent of donations that went to nonprofits in 2018 came from email fundraisers. More than 90 percent of donations to the entire nonprofit sector, today, come because of a piece of paper that physically shows up in your mailbox.

Go check your own mailbox right now. See that appeal from the American Red Cross (\$2.6 billion in revenue in 2019)? What about that one from the Nature Conservancy (\$1 billion in revenue in 2019)? Why are they sending you paper mail? Because they know it works. They get most of their donations from direct mail.

These large charities know what they're doing. They're not finding ways to get rid of paper mail in favor of email alone.

## Key Points

- **Your fundraising success is going to come from well-crafted, well-timed paper-based appeals.** Learn from the “big boys” in the charity world. They wouldn’t be doing paper mail if it weren’t profitable.
- **You have to ask more.** The biggest reason that donors cite when researchers ask them, “Why did you not make a gift to charity X?” is “They didn’t ask me.” We recommend you send a fundraising appeal at least four times per year to your membership/mailing list. Scared? You’ll get past that. Guess what happened when FCA national started doing that? Our donations improved, and we got compliments from many longtime members. They were happy to hear the kinds of real-world consumer problems their gifts could solve, and they were happy to give.
- **Organizing a calendar, organizing your letter, reply cards, return envelopes, etc., is key.** You will put the work in up front. The first time you do this will be the most work (but it’s not that hard, and we have templates below). Once you set it up, you can re-run it like clockwork. What seemed like a huge leap becomes normal, and your whole board will feel pleased to see the gifts come in at a higher rate.

## The 4 Elements You Need for Successful Direct Mail Fundraising

**1. The “Ask”**—That’s fundraising speak for your pitch letter, your request. Another way it’s described is as your “offer”. You are offering your members a chance to solve a real problem, experienced by real people. This is where storytelling comes in. You will write up brief stories about the members and consumers who contact you to ask for help. Crucially, your letter will tell this story to the reader and let her know that **they can solve this problem** with a gift. The tone is direct, conversational, and appropriately emotional (emotions motivate giving; facts and statistics don’t).

**2. The Mechanics and the Paper Pieces**—These are the actual, physical pieces that must all be used together in each mailing. Every element is crucial; if you don’t include all of them, you’re wasting your money on a fundraiser that won’t bring in much. Again, this is a do-it-once-at-the-beginning job. After that, all you have to do is alter dates and sometimes a bit of language. Set it up in the beginning, and you have master template files. Easy.

- The letter itself
- The “reply device”—a separate, stand-alone, fill-in card to return by mail.
- The outer mailing envelope

- The return envelope addressed to your FCA (**not** postage-paid)

**3. The Follow-Up: Thanking and Reporting**—Of course, you already know that every gift needs a kind thank-you letter (also for tax-deduction purposes if you're a 501(c)(3)). But it goes beyond that. Your newsletter should always include a section where you tell your donors and members the good work they did with their gifts.

### Get Personal

The more personal your thank-you letter, the better. If you can hand-sign thank you letters or hand-address the envelopes, this is a great project to split up among your board and volunteers. Personal thank-yous are especially important for large gifts. A phone call from a board member to a generous donor is always a good idea.

**4. The Calendar**—Plan for one year, and get your dates on your calendar at the beginning. This will set you up for a clockwork operation throughout the year. We suggest you mail four times per year, but you can start with less. If you only mail a newsletter/appeal to members once per year, start doing it twice, for example.

The end of the year between Thanksgiving and Christmas is the most generous time of year. People give the most gifts then, and the calendar will concentrate on this time of year in more detail because it will be important to your bottom line.

The dates we suggest are guidelines; you may not be able to hit them exactly, and that's fine. Just try to be reasonably consistent. That is, have a spring appeal, a summer appeal, a fall appeal, and a holiday-season appeal (or one in spring, and one at the holidays).

### The Mechanics: Envelopes and Reply Cards

#### **ONLINE GIVING!**

*Getting your paper letter into people's hands is crucial, but we don't care if they pay us with a paper check or if they donate with a card online. If you don't have donation capability on your website, get it going now. Every obstacle you place between the donor and her ability to give cuts the number of donations you'll receive. Online donation capability is a must. Not having it is an annoying obstacle to your donors. Be sure your reply device points to your website's donation page, too.*

These are details that matter. Failing to do them right will compromise your fundraising. If you've gotten this far, don't take short-cuts now and waste your good work. What happens if you do? Not including a pre-addressed return envelope will cut your donations in half. Not including a reply card (also called 'reply device') will cut your take, too.

## **Reply Device—Stand-alone, pre-cut, not attached to other paper**

### **My gift to help with consumer advocacy!**

Yes! I will help:

\$50

First, Last \_\_\_\_\_

\$100

Street, City \_\_\_\_\_

\$250

State, Zip \_\_\_\_\_

\$1,000

Visa/Mastercard/Discover:

Other amount (\_\_\_\_\_) \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_

My check is enclosed \_\_\_\_\_

3-digit on back \_\_\_\_\_ Exp. \_\_\_\_\_

(or give at [www.funerals.org/donate](http://www.funerals.org/donate))

Signature \_\_\_\_\_

**2019EOY**

Use this checklist to make sure you have every crucial piece in your reply device:

Do you have an “ask string”? That’s the different monetary levels suggested. Don’t go below \$50, or you’ll get more \$25 donations. Start with \$50, and you’ll get more \$50 donations.

Did you make sure the donor’s name and address was printed on the reply device too? Yes, it makes a difference. It also helps your record-keeping.

Did you give space to write a credit card number?

Did you make sure to include a line for the expiration date?

Did you make sure to ask for the three-digit code on the rear of the card?

Did you make sure to give a signature line?

Did you point the donor to your online giving page with a link?

Did you make sure to put a tracking code that tells you which mailing/campaign generated this donation? For example, a code could be **2019EOY**. That tells us “this gift came from our end-of-year fundraising letter in 2019.”

## Thanking and Reporting: Sample Newsletter Piece

### Key points:

- **Each newsletter needs a section where you report the good work donor gifts have accomplished.** This is where you thank your members and donors explicitly, and by showing them the actual results. Tell them about the family you saved \$3,000 by pointing them to your price survey; tell them about the couple you helped find a cremation they could afford, etc.
- **It's short, no more than four-pages.** Some of you will remember when FCA National's newsletters were much longer. There's a truism in fundraising: "No one reads your newsletters." That's only a slight exaggeration. Readers skim and move around; few sit down to read a charity newsletter cover to cover. Use it to inform members about information they need—annual meetings, new price surveys, new forms available, legislation you're working on—briefly, but see it as an investment in your fundraising. Leave them feeling good about the gifts they make.

### Your One-Year Fundraising Calendar

The calendar below gives you suggested dates for sending your fundraising pitches. You'll see that we pay extra attention, and suggest extra steps, for your end-of-year fundraiser. Those extra steps include sending emails to the same mailing list that you are sending paper mail to. These emails should be shortened versions of your pitch letter. Each successive supporting email should be shorter; just cut more text each time, focusing on the most important message. As you get closer to the end of the year, these emails should get more urgent. For example, "Time is short! Please give by December 31, 20XX. . ."

Supporting emails always help any campaign; don't be afraid to use them any time. Don't have emails for every one of your members? Send to those you do. And then, make a point of collecting emails. In each of your newsletters, put an eye-catching box that says to the reader something like, "Please update your email address with us! We want to make sure you get FCA's news and member alerts. Send us your name and email to **fcaofanycity@gmail.com**. Thank you!" Repeat this, then repeat it again, then keep repeating it. Repetition is crucial to encourage people to action, both for donations and for updating their contact information.

**March/April**—Your spring fundraising letter. Even if you decide not to do a stand-alone fundraising letter, make sure your spring newsletter carries it. **An entire page**, and a complete letter that tells a story, not just a little box timidly asking for "contributions to support our work".

**June/July**—Your summer fundraiser

**September/October**—Your early fall fundraiser

**End of November, beginning of December**, your important end-of-year campaign. If this is your first time, you're going to think we're asking you to "send too many emails". Go with us, and take the leap of faith, because it works. You need to do what seems like "over-communication" at the end of the year. Repetition creates urgency, and it helps people notice your campaign. Remember, not everyone you mail is going to read your letter, or read it right away. So remind them of the need to give with several emails leading up to the end of the year.

Every charity that does good fundraising is "over-communicating" because it works.

1. Have all your copy, envelopes, reply devices, and every element already done by the beginning of November (hopefully earlier). Make sure you share these with your print house ahead of time to work out any problems. **Absolutely ensure that your print house knows that the letter should be put into the mail in time to have it hit mailboxes just after Thanksgiving.** Timing matters.
2. Have your letter *arrive* in mailboxes hopefully the day after Thanksgiving or shortly thereafter. Again, this is when your letter should *arrive* in your members' mailbox; not the date your print house should mail it. It needs to be mailed *earlier and timed to arrive then.*
3. You'll want to follow this letter up with three emails close to the end of the year. **Be sure there's a clear, large-type link to your donation page in each email.** Model these on your letter, but with each email that gets closer to the end of the year, shorten it. Take out the details, leave the main "ask", and be sure to encourage donors to "give by December 31<sup>st</sup>!". Be frank. You need money to help members and the public, so say it directly. For example:

"Your gifts help grieving people. Without them, we can't solve these problems for families facing a death. They're confused about options and worried about price. You are FCA of Anycity, the only charitable group that specifically helps the bereaved at the worst time of their life while they face one of the most expensive purchases they'll make.

Please give generously by December 31<sup>st</sup>!"

December 27—email one

December 30—email two

December 31—email three

## Getting More Help and Advice

This guide is a simplified adaptation of course work we learned in an intensive fundraising retreat in the fall of 2019, and from the Nonprofit Storytelling Conference held annually. The companies and people behind these events are top-notch. They've done qualitative and quantitative research; they backed up and proved everything they said.

Check out **The Better Fundraising Company** and the **Nonprofit Storytelling Conference**. Just search those terms online and you can't miss them. We recommend you sign up for their free webinars and videos. The staff host frequent livestreams with examples of good and bad fundraising letters, ways to make online giving easier, and a lot more. You'll also get ideas for online fundraising and special or occasional email-only fundraisers. While direct paper mail is going to be the main source of your donations, emails and social media posts done right, at the right time, can both bring you in extra donations you weren't expecting and support your overall campaign throughout the year. The more you stay in touch with members and donors, the better your results.