



## INSIDE THIS ISSUE

- p. 2 Six Simple Steps for Making the "Ask"
- p. 4 Online Fundraising: Making It Personal



# innovative nonprofit SOLUTIONS

JANUARY 2006  
Issue No. 2

**Subscribe to Our  
Quarterly E-Newsletter**

**Visit [www.theinsgroup.com](http://www.theinsgroup.com)**

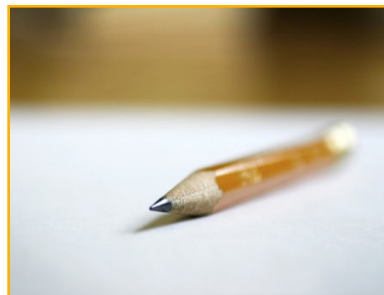
Our next e-newsletter will feature:

- Special Events Planning
- Working with the Media
- Resources You Need

**Our Mission:** We help organizations create innovative solutions to build their capacity.

We accomplish this by assessing, designing and implementing strategic fundraising, marketing and management programs for nonprofits, community-based, faith-based and educational institutions and government agencies nationally.

## Message from our President



**Welcome to the second issue of The Innovative Nonprofit Solutions E-Newsletter!** It's 2006 and we hope your year has begun with a sense of accomplishment and anticipation for the successes the year will bring to your organization. The INS Group achieved very important milestones in 2005, including the unveiling of our new website

and launching this quarterly newsletter. We are even more committed to fulfilling our mission *to help organizations create innovative solutions to build their capacity in 2006.* In order to accomplish this goal, The INS Group will host effective grant writing and fundraising workshops and create innovative learning tools such as CDs, DVDs and manuals. **Visit our workshop calendar at [www.theinsgroup.com](http://www.theinsgroup.com). Remember to register soon because classes fill up quickly!**

Our first issue for 2006 highlights invaluable information on key interests in capacity building and sustainability including: **1.** Major Giving Campaigns and Making the "Ask", **2.** Prospect Research, and **3.** Emerging Trends in Philanthropy: Internet Fundraising and Giving Circles.

Use the Innovative Nonprofit Solutions E-Newsletter as your primary resource for information about strategic planning, fund development, grant writing, and research for nonprofits. Let us know what is important to you and we will seek ways to help you become more informed on those topics. Send your ideas, questions, and thoughts to [info@theinsgroup.com](mailto:info@theinsgroup.com) and we will contact you regarding how you can participate.

- **Ruth A. Peebles**, President and Founder, The INS Group

# MAJOR GIVING CAMPAIGNS



A major giving campaign is a time-limited campaign in which the fundraising goal is made public. In defining major giving, it is important to remember that from the donor's perspective, any sacrificial contribution to your organization is a major gift, regardless of its relative size. Nonetheless, to reach the fundraising goals of your organization's major giving campaign, it is essential for development staff to direct the most energy toward those gifts that will have the greatest impact.

The most effective major giving campaigns involve extensive planning, including garnering the support of the organization's board of directors, conducting effective prospect research, and knowing how to make "the ask."

## Six Simple Steps for Making the "Ask"

The "ask"ing process is the most critical element of any fundraising campaign, especially with major gift campaigns. While each solicitation presents an opportunity to secure another gift, it is also possible to make critical errors that may result in a lower donation or no donation at all. The following tips for making the ask will help you to be far more effective in securing the gifts you seek and in meeting your organization's needs.

**1. The most effective method of fundraising is person to person.** Meet with your prospective donor face to face. Requests conducted

over the telephone often result in substantially smaller gifts or refusals.

**2. Be knowledgeable about your organization and community needs and the issues you are trying to address.** Tell them why you are involved and what the organization means to you with clarity, sincerity, and passion.

**3. Know your prospective donor.** Do your homework and learn as much as you can about the prospect and their interests through board relationships, internet research and newspaper publications prior to the visit. Such information will give you more credibility and leverage in the meeting.

**4. Determine who should participate in the meeting.**

You may want to bring a board member, client, or another staff member. Having at least two people present will take much of the pressure off of a lone solicitor. The second person can contribute any comments the first person forgets. In addition, while one person is talking, the other person can observe the prospect and determine which aspects of the presentation are most effective.

**5. Schedule the appointment. Ask for a specific date and time to meet.** If they are uncertain about their schedule, set a tentative date. Invite the prospect to meet you onsite, if possible. Otherwise, schedule the meeting at the prospect's office or home to ensure the formality of your request.

## Where Do I Look For Donors? Prospect Research

Prospect research is essential to any fundraising campaign, but especially to your major gifts campaign. It affords you the opportunity to obtain useful background information about an individual's assets, philanthropic interests, business interests, and other affiliations prior to meeting with him or her. The more you know about a prospect, the greater your chances of receiving a large gift by offering them an opportunity to give to a cause that is important to them.

### Helpful Websites for Prospect Research:

**Info USA**  
[www.infousa.com](http://www.infousa.com)

**411**  
[www.411.com](http://www.411.com)

**International People Directory**  
[www.infobel.com](http://www.infobel.com)

**Thomson's Dialogue Database Collection**  
[www.dialog.com](http://www.dialog.com)

**Switchboard**  
[www.switchboard.com](http://www.switchboard.com)

**The Ultimates: A People Finder**  
[www.theultimates.com](http://www.theultimates.com)

**ZoomInfo Biography Site**  
[www.zoominfo.com](http://www.zoominfo.com)

*Continued on Page 3*

## Six Simple Steps



### 6. Meet with the donor and make the ask!

You should:

- **Open with pleasantries.**

Thank the prospect for seeing you and begin the conversation with something relating to the prospect, i.e. job, family etc.

- **Get to the subject**

Describe the mission, goals and objectives and name one or two major accomplishments of the organization. Be prepared to describe the services offered to clients and the difference their contribution makes by sharing at least one client story. Tailor to the prospect's interest, i.e. you may know

that he or she already supports Women's organizations so there might be greater interest providing support for a domestic violence shelter. Be brief, but thorough, with your presentation.

- **Get to the asking.** The purpose of the visit is to ask for money. Ask the prospect to consider a specific donation amount. Convey the "ask" as an opportunity for the donor. Talk about opportunities for the clients your organization serves, not the needs of your organization. Stay sensitive to what your prospect is thinking while you are talking and remember to focus on the prospect's interests.

- **Be prepared for any number of negative responses.** Consider all of the negative responses that could be presented and determine the best way to respond. One way to anticipate and address negative responses from a prospect is to "rehearse" the meeting with your co-solicitor.

- **Never leave empty handed.**

Remember that gift requests are not "all or nothing." If the prospect denies a cash contribution they might provide sources for in-kind donations, or direct you to other prospects. Your job is to identify the level of volunteer and financial support at which the donor prospect is willing to say "yes."

- **Leave on a positive note.**

Rarely do people commit to a financial gift right on the spot. Ask if it would be helpful to send any additional information that would aid them in making their decision. Always express your thanks to the prospect for his or her time and consideration of your request.

- **Thank the prospect.** After the meeting, you should promptly follow-up with a thank you note and provide any requested materials and information that you were unable to provide during the meeting. When a prospect makes a donation, be sure to send a formal acknowledgement to the appropriate person (s).

*"The INS Group provided invaluable assistance in developing fundraising materials and strategies for our organization. What once was a dreaded task is now a manageable responsibility. The INS Group provided prompt and courteous service, which always exceeded expectations."*

**Verona P. Edmond**  
Executive Director  
The Women's Business  
Center of North Carolina

### Does your board need training on fundraising and how to make an ask?

Contact The INS Group today to learn more about board training on fundraising.

919-231-2870 or  
[info@theinsgroup.com](mailto:info@theinsgroup.com)

# Online Fundraising: Making It Personal

According to a recent survey by the Pew Internet & Life Project, the number of Americans who gave money to charities online has increased significantly in the past year, bolstered by 13 million people who donated over the internet to help victims of Hurricanes Katrina and Rita. Since 2001, the number of online donors has increased by 53 percent, with 26 million people having donated online at least one time. With this surge in online giving, it is important to identify ways your non-profit can benefit from this emerging trend.

Online fundraising is more than just a “donate now” button featured on your organization's website. Following are some tips to make your website more personal and friendly to the donor:

- **Provide the organization’s mission and contact information.** Your website should clearly state your organization's mission and location, general contact information and contact information for each staff member. You may want to include your organization’s contact information as a footnote at the bottom of every webpage.
- **Drive potential donors to your website by providing good content.** Your website should include information about your organization’s history and accomplishments, a description of programs and services, current events and activities.
- **Be sure to update your website with new, pertinent information monthly.** Interesting and timely content can make your website a resource for people tracking or researching issues related to your mission, thus converting general web visitors into donors. Include links to helpful websites and feature resources and publications associated with your organization’s mission.
- **Tell readers how to become supporters.** Your homepage should have a navigation button that reads "Support Us," "Get Involved," "What Can I Do?" or something similar. This link should lead to an introductory donor page that outlines levels

*Continued on Page 5*



## Trends in Online Giving

Online giving has increased more than two-hundred-fold in the past five years, *from \$10 million in 1999 to about \$2.62 billion in 2004*. A major reason for the increase has been the ability of charity websites to appeal to potential donors on a personal level.

**Source:** “Web Lets Donors Find Specific Needs and Fill Them.” USA Today, 9/11/05.

## Do you know the first step to successfully securing a grant?

Find out by listening to our *12 Steps for Successfully Securing a Grant* CD.

This effective grant writing learning tool is now available for only \$10.

Visit

[www.theinsgroup.com](http://www.theinsgroup.com)

to order your CD today!

## More About Internet Fundraising

Although more and more organizations are sending solicitation letters via e-mail, you must be sure to consider those donors who do not have access to the internet or simply do not like receiving solicitation letters via the internet. Some view requests for contributions via an e-mail impersonal, or they may have security concerns about donating online. Perhaps you should consider segmenting your donors - those who will receive online solicitations and those who will receive a letter in the mail. During specific fundraising campaigns, send reminders to current and potential donors.



## Giving Circles -- The Latest Philanthropic Trend

Some individual donors are adopting a different approach in their charitable giving. Instead of donating \$50 to five charitable organizations, they are donating \$250 to a giving circle. Similar to an investment club, members of a giving circle pool their money and jointly decide which charitable organizations to support.

According to a study by New Ventures in Philanthropy, more than 220 known giving circles have been formed in 40 states, with members donating as little as a dollar per day and up to \$20,000 annually. While some giving circles have existed for a while, approximately 80 percent of these organizations have been formed in the past five years. Several of the larger circles have given hundreds of thousands of dollars in a single year, and since 2000 the groups as a whole have donated more than \$44 million.

Giving circles are usually organized around a particular issue or area of interest, such as issues affecting women and minority populations, the environment, or education. A study by the Foundation Center reveals that giving circles have diverse interests, with the top being youth development (34%), women and girls (27%), human services (25%) and mental health/crisis intervention (20%). Notably, these numbers differ somewhat from foundation giving trends. In 2004, the Foundation Center reported that grant dollars funded education (26%), health (18%), human services (15%), and arts and culture (12%). Many giving circles have also reported success with foundations matching their circles' annual contributions or matching specific donations to the charitable causes that the giving circle has supported.

*Continued on Page 6*

*Continued from Page 4*

### Online Fundraising: Making It Personal

of giving, how donations will be used, and benefits to the donor. Because

supporters want to know that they are supporting worthy causes, how donors' contributions will specifically be used may be a topic worthy of a separate page on your website which

could be linked from the introduction donor page.

- **Tell supporters how to donate.** Provide a link to a payment page and be clear on how donations can be made, i.e. check or money order or by credit card. If you are unable to offer online donation

opportunities, offer a printable donation form to mail in or fax.

- **Address ethical, privacy and security concerns.** When a donor decides to make an online contribution, he or she wants to be reassured that your organization maintains the highest standards of ethics, privacy and security.

*Continued on Page 6*

*“Collective giving provides an opportunity for individuals to give in community with others who have similar interest and offers a tool of accessibility for those who may have been detoured by their limitations to give as an individual. This is the most important aspect of giving circles for those of us who are working to reach new groups of donors using traditional methods and approaches of donor development.”*

**Athan Lindsay**  
Member  
The NGAAP Fund

**Learn more about giving circles by visiting the following sites:**

**Greensboro Future Fund,**  
Greensboro, NC  
[www.cfgg.org](http://www.cfgg.org)

**Next Generation of African-American Philanthropists,**  
Raleigh-Durham, NC  
[www.ngaapfund.org](http://www.ngaapfund.org)

**Rainmaker's Circle**  
Washington, DC  
[www.wawf.org](http://www.wawf.org)

**Women's Impact Fund**  
Charlotte, NC  
[www.fft.org](http://www.fft.org)

**Womenade**  
Winston-Salem, NC  
<http://womenade.tripod.com>

Continued from Page 5

## Online Fundraising: Making It Personal

If your organization promises not to sell or provide their email addresses to other organizations, be sure that your organization strictly adheres to those policies. In addition, honor any requests donors make to remain anonymous.

- **Incorporate your website into everything your organization does.**

Be sure to feature your website address on business cards, stationary, brochures, T-shirts, event invitations, and every printed document. To drive individuals to your website, include links to your website within emails sent to current donors,

prospects, collaborators and volunteers, friends, and colleagues allowing them to click for further information or to donate online.

E-mail banners with a link to your website can be added to each staff member's e-mail signature. Your goal is to drive as many current and potential donors as you can to your organization's website.

Remember fundraising online is only one effective strategy that should be included in your comprehensive fundraising and marketing plan. Your website and online fundraising activities

enhance your efforts to build long-term relationships with donors. The best way to fundraise is a combination of techniques.

The INS Group can help your organization develop and implement strategies to attract and cultivate donors online.

**Contact us for more information at [info@theinsgroup.com](mailto:info@theinsgroup.com).**

*"The INS Group provided realistic and positive perspective about writing grants. The workshop participants received an invaluable insight on the world of foundations, the process and examples to guide us through successful fundraising."*

**Tracy Stone**  
NC Department of



Continued from Page 5

## Giving Circles –The Latest Philanthropic Trend

Not only do giving circles allow members to maximize the impact of their charitable contributions, they also allow members to connect substantively with the communities and causes they care about and participate in a social network of people who share similar interests and values. Together, members gain an in-depth understanding of a specific area of interest, develop strategies on ways the group can have an impact, and leverage monetary contributions with volunteerism and by lending their individual expertise to the nonprofits the giving circle supports.

As with all fundraising, partnerships with giving circles require relationship-building. Be passionate about the work of your nonprofit. Share the mission and activities of your organization with the community at-large through your organization's website and the media. You never know who might be a member of a giving circle. Conversations with friends, family members and colleagues, are the best ways for a giving circle to learn about and consider donating to your organization.

**Sources:**

New Ventures in Philanthropy, [www.givingforum.org](http://www.givingforum.org)

Foundation Giving Trends, 2004, [www.fdncenter.org](http://www.fdncenter.org).

**Visit Our Updated Spring Workshop Calendar today to register for a Grant Writing or Fundraising Workshop at [www.theinsgroup.com](http://www.theinsgroup.com)!**