

Fundrai\$ing on a Shoestring?

A step by step guide to virtually free campaigns



Faith Wood

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*A step-by-step guide to
virtually free campaigns*

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For my sister who battles with RSD each and every day and reminds me that:

Courage does not always roar, sometimes it is simply the quiet voice in the middle of the night saying ‘we’ll start again tomorrow.’

--original quote by Mary Anne Radmacher

We hope and pray for a cure every day!

The Faith for Fern RSD Foundation

Please visit www.faithforfern.com to continue to provide donations to the Faith for Fern RSD Foundation. Proceeds from the sale of this book will also go into that fund. With continued support, perhaps one day RSD will be a thing of the past.

Faith is available to speak about this project and offers workshops to help you and your team facilitate your own success. She encourages business owners to get involved with fundraisers to grow their businesses. Contact Faith by visiting www.imind.ca or by emailing info@imind.ca to find out more, and to book her to speak at your business events.

Thank you to everyone who helped us achieve our goal and to all those who poured out love and encouragement along the way!

We hope you and your team will achieve great success with your venture and we wish you all the very best. Our simplest advice: stay focused, remain calm, and be present!

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Introduction

A Roadmap to Successful Fundraising

If you're reading this book, you're probably thinking of undertaking a fundraising campaign, or exploring new ways to increase the effectiveness of your current fundraising activities. You've come to the right place! Through our own recent fundraising efforts, we've accumulated a wealth of first-hand expertise on running a successful, modern campaign. In this book, we've distilled our wisdom into a roadmap to help you achieve success in your own campaign.

Have you ever stopped to consider just how many great causes are competing for donors' hard-earned dollars? There are more than 161,000 registered charities in Canada alone.¹ Just think of the barrage of telephone solicitations you dodge over the dinner hour each day, and the heaps of promotional material in your mailbox that you toss without a second thought.

Given the sheer competition, it's no wonder fundraising initiatives face so many hurdles in achieving their goals. To be successful in your campaign, you first need clear project goals and objectives, and a vision for how you will attain them. What's more, achieving these objectives takes a lot of work, time, and effort. This means that identifying and recruiting a skilled and dedicated team of people who can help you carry the load is also essential to your future success.

1 "How many charities and nonprofits are there in Canada and the provinces?," accessed October 2, 2010, http://nonprofitscan.imaginecanada.ca/tir_how_many_charities.

Perhaps the most critical challenge is figuring out how to spread the word about your cause. In the old movie *Field of Dreams*, Kevin Costner says, “If you build it, they will come.” Unfortunately, this is not always true. However worthy your cause and compelling your story, if no one finds out about it, it’s virtually impossible to have them show up to support you. First you have to craft a memorable message that people can relate to, and then you have to get that message out there. Doing so takes commitment, a few key skill sets, and an emphasis on promotion.

And of course, the necessity of operating on a shoestring budget underlies all these other considerations. As the saying goes, it takes money to make money—but by definition, fundraising initiatives must somehow attract funds without a substantial cash outlay. Running a successful campaign is similar in many ways to running a successful business, but with greater constraints on financial and human resources, and often with pressing deadlines.

As a small group of business owners who, in 2009, managed to create an international wave of attention for a deeply personal cause, we want to help you navigate these challenges. There were no charity designations involved, no large PR companies on the payroll, and no deep pockets funding the project—just an innovative group, a deep level of compassion, and a compelling story.

In this book, we’ll tell you how we did it and what we learned along the way. We’ll also offer insights and tips from other individuals—expert fundraisers and people who have donated time or money.

Whether you're looking for a new and creative method of fundraising or simply looking to incorporate social media into your current campaign, we aim to inspire you to tackle a new means of promoting your cause. May this book inject new hope into your campaign as you use powerful (and cost-effective!) forms of conversation to create a giant ripple in your own community ... or even the world.

The Story Behind the Book

Faith Wood, an Airdrie-based entrepreneur, has an identical twin sister, Fern, who suffers from a rare and debilitating disease known as reflex sympathetic dystrophy (RSD)². Also known by other names (such as complex regional pain syndrome or CRPS), RSD is a syndrome with diverse symptoms characterized by constant pain—patients say it feels like being doused in gasoline and lit on fire, 24 hours a day, 7 days a week. Treatments for this disease are painful and often produce insufficient relief for sufferers.

Despite being treated for this disease since 2003, Fern was told in 2009 by her Canadian pain specialists that they could do little more to help her gain relief from this relentless disease. Her pain was not being well managed in spite of high levels of medication, and her long-term prognosis was considered extremely poor. Fern was wheelchair-bound, living on high doses of narcotics, and incapable of participating in any kind of healthy or active lifestyle.

2 American RSD Hope, accessed October 2, 2010, www.rsdhope.org.

As a result, Fern chose to proceed with a groundbreaking procedure in Mexico—an experimental ketamine coma treatment she researched on the Internet. The coma experiment was both risky and expensive, but it offered hope of putting the RSD into full remission. In order to participate in the trial, Fern would need substantial funds for travel and hospital care. Canadian Medicare would not provide insurable coverage for these procedures; because the procedures were experimental in nature, they had not been verified as a safe treatment alternative. Since the government wouldn't cover the costs, and Fern could not participate unless she had the capital to do so, Faith began to explore methods of raising the funds for her sister.

Faith approached her friends and colleagues and requested both their ideas and their assistance in finding a way to generate the desperately needed finances that would allow Fern to be considered for this treatment. A few glasses of wine later and a team of compassionate, ambitious, and skilled entrepreneurs assembled to launch the Faith for Fern project.

This book shares the framework of what we did to raise the capital and how we did it. We've also gone further, interviewing other fundraisers as well as those who donate to causes, to give you even more fundraising tips and secrets. (See "Contributors" at the back of this book for a list of those who helped on our project.)

Chapter One:

Planning and Prioritizing



How should you begin a fundraising campaign? At the outset of any large project, the decisions, challenges, and opportunities can be overwhelming—and in a situation where you must accomplish a great deal while making the most of limited resources, it's even more important to map out your path carefully. In this chapter, we'll help you focus on what's important by sharing the story of the Faith for Fern project kickoff.

Setting Your Sights

Clear goals and objectives are the heart of any fundraising campaign, and they're essential to its success. When planning a campaign, you must have something powerful to say, not just say something powerfully.

Defining the purpose and intent of your project, with measurable timelines, is therefore a critical first step to launching any initiative. Our Faith for Fern project goals were relatively simple, but we still had to define them in terms of time, resources, activities, and team members. We especially needed to identify an ultimate target date and outcome.

Before you approach others with your ideas, it's important to establish the ultimate outcomes you want to achieve. Asked how to appeal successfully to the donor of today, Michael Drew, a book marketing and promotion specialist, advised that "today's consumer is focused on making a difference and is choosing to support activities which portray a measurable and definitive impact on the community."³ Michael describes societal motivations as being in the "age of authenticity."⁴ This means that "volunteerism is on the rise, and our youth are searching for opportunities to make socially conscious decisions."⁵ If we are to be successful in our campaigns, we need to keep this in mind.

3 "As the Pendulum Swings," Beneath the Cover, accessed October 2, 2010, <http://www.beneaththecover.com/2008/01/16/as-the-pendulum-swings/>.

4 Ibid.

5 Ibid.

Your campaign focus should clearly articulate a benefit to others. It must be authentic and credible. Individuals have the ability to search out information on the Internet that can disprove or support your claim, so be careful to provide legitimizing data to back up your project. Talk has never been cheaper than it is today. Now, more than ever before, is the time to do something. No matter what industry you're in—and this includes fundraising—you need to show your customers that you deserve their business. You must prove yourself worthy if you're going to thrive.

Answering the Five Ws and an H

You can get ready to present a focused pitch to potential donors and supporters by asking yourself a few key questions. In developing the story of your campaign think about the familiar five Ws and an H that lie at the core of any narrative: who, what, where, when, why, and how? Regardless of the type of campaign or project you undertake, making time to consider these questions early in the planning and initiation phases will make sure you don't find yourself at a loss for answers later.

Who?

This question has two angles. Who stands to benefit the most from your project efforts (either individuals or groups)? And who should be involved as strategic partners in the project?

In our case, Fern stood to benefit personally by participating in the ketamine coma trial. This was not a group result, but rather a very personal benefit.

The question of who should be involved on the project team was more complicated, as in most fundraising efforts. There are a number of factors to consider in sorting out what roles need to be filled and finding people who are qualified and willing to fill them. We'll examine these factors in detail in Chapter Two.

What?

What are the specific, measurable, and primary objectives of the project?

The goals of the Faith for Fern project were twofold:

1. Raise the necessary capital for Fern to participate in the ketamine coma study before the study ended. This meant raising approximately \$75,000 in 90 days—the equivalent of \$858 a day, or \$35 an hour.
2. Raise awareness and attention for Fern's disease, RSD.

Some objectives are relatively simple and need only be met once: raising a specific amount of money to install an elevator in a church or build a new community playground, for example. Others are harder to quantify, such as that of the John Petropoulos Memorial Fund (JPMF), which raises money to increase public awareness about workplace safety issues facing emergency responders. JPMF narrows its objectives by tackling one safety initiative at a time and raising the necessary funds for that project before moving on to another.

Where?

Where should you direct the campaign, in terms of both geographic locations and potential groups of donors?

The answer to this question will depend on the specific nature of your cause, the scope of your project's objectives, and the extent and location of your available resources. For causes that are highly personal and primarily of interest to a particular community, or that have modest fundraising goals and limited resources, it makes sense to stay close to home. If your objective is broader and concerns a group rather than an individual, you'll likely want to spread awareness further.

Since ours was a personal cause, with Faith making the request on behalf of her sister, we started locally, in Faith's area. Thus, the Calgary region and the province of Alberta became the primary focus. We later expanded the focus to include Greater Victoria and Manitoba as we tapped into areas where direct family were able to speak to the cause.

When the Town of Nanton decided to raise money for a new community playground, it planned a number of small events in the community itself. Coordinator George Woof says that events such as a community garage sale, Friday family dinners, and a festival for kids got the entire community involved in and connected to the project.

In Chapter Three, we discuss our strategies for identifying the groups of donors who were likely to be supportive of our cause.

When?

When should you start your project? When does it need to be done?
When will major milestones be achieved along the way?

Sometimes the timing of a project is determined by circumstance. In our case, with the ketamine study moving into its final stages and Fern having already received an invitation for a preliminary review in August, we had 90 days to raise the capital. We later adjusted this initial 90-day goal to 120 days, to coincide with treatment dates.

If the timing of your project is flexible, however, you may want to consider how different timing may affect your success. Some times of the year may be more advantageous than others. For example, a Christmas campaign can catch people in a generous gift-giving (or tax-benefit) mindset: according to a 2009 eCampaigning Review study of two million donors to 50 non-profits around the world, 40% of online donors give in December, 40–60% of those in the last two days of the month.⁶ Summer, on the other hand, can create delays due to hectic vacation schedules for both donors and volunteers.

⁶ “2009 eCampaigning Review,” Advocacy Online, accessed October 2, 2010, <http://www.advocacyonline.net/ecr09>

Why?

Why the urgency? What happens if you don't make it?

The “why” behind your campaign will be unique to your cause. For the Faith for Fern project, the answer to this question was multifaceted.

First, Fern had an imminent appointment with Dr. Anthony Kirkpatrick⁷, the lead physician on the ketamine coma trial. If she succeeded in securing a spot in the trial, we had to make sure we had the financing already in place.

Second, the initial study was closing in Germany, and only Mexico remained as an option for trial participants. In order to have the chance to participate, Fern needed to be accepted before the Mexico study also achieved its quota.

Third, her health was deteriorating as time progressed.

Finally, we understood that once Fern was accepted into the study, she would have to be ready to head to Mexico within two weeks' time.

Lani Donaldson of the Lani Donaldson Literacy Foundation, a contributor to the Faith for Fern cause, states that knowing the *why* of a project is crucial before you begin. “The *how* will come as the group you assemble comes together,” she says.

⁷ Dr. Anthony Kirkpatrick is an anaesthesiologist at the University of South Florida College of Medicine in Tampa. He has been studying the effects of ketamine treatment, including induced coma, in patients with RSD.

How?

How can you generate a compelling message or story that will have an emotional impact and secure buy-in from your target audience? How can you get that message out there and actually request support?

The answers here will depend largely on your answers to the five Ws above. In Faith for Fern, the “how” of the project was determined after Faith had put together a motivated team who could contribute an array of skills, ideas, and opinions to help create and communicate a compelling message. Together, we came up with a plan.

Early on, Faith recognized the need to run this campaign like a business venture, not like a well-established charitable organization. We needed to focus on building momentum through viral marketing, relationship building, and traditional press releases. Faith also knew that it was essential for everyone to believe that our lofty goals were achievable and never lose our focus when others told us that the goals were too ambitious or couldn’t be reached.

Our marketing professional, Brenda Mahoney, remembered a news story from several years earlier about a woman in the United States who wanted to go to dental school. This woman lacked the funds to cover the fees, and created a website to help her raise money to achieve her goal. Her web-based strategy was successful. We felt this innovative idea could potentially be duplicated. Unfortunately, the woman’s website had long been removed, and we were unable to contact her to find out how she did it. As a result, we would

be designing and implementing the idea without the benefit of someone else's first-hand knowledge. (We had exactly the problem we're trying to spare you by writing this book!)

As a result of the timing of Fern's appointment, we would be initiating the campaign in line with the busy summer holiday season, which could not be avoided. We had to find a method for keeping the momentum lively through this time frame. Because the project was voluntary, we also had to take our team members' work and family commitments into account and consider how to keep the team focused while still giving them space to honour these commitments.

We elected to run with an online fundraising campaign because we felt we lacked the opportunity and time needed for more traditional fundraising activities and events. It was therefore important to create and consistently participate in an online community. Today's web-savvy audiences demand relevant, up-to-date information, so timely communication was a big part of our marketing plan.

Because of the mixture of legitimate and illegitimate content on the Internet, consistent communication is also critical in making individuals feel safe to donate online. They need both assurance that the cause is legitimate and accountability for the dollars being collected. They want and need to know how their contributions are being dispensed.

We discuss strategies for building online communities and promoting your cause through a website in Chapter Three and Chapter Four, respectively.

There are countless ways to raise money. Maryanne Pope founded JPMF, which raises public awareness about workplace safety issues. Her organization has obtained funding through a variety of sources:

- Provincial government grants
- Lottery-funded grants
- Key stakeholders
- Individual donations
- Fundraising events (e.g., cookie dough and memorial pin sales, anniversary and project-launch parties, raffles and silent auctions)

JPMF also sells the safety educational tools it produces and uses the proceeds for subsequent projects. “That makes the most sense,” says Maryanne. “Raise money and awareness at the same time. Without money, we cannot achieve our work in the world.”

When determining how you will achieve your objectives, get creative. Paul Nahirney, a consultant whose company, Nahirney & Associates in Edmonton, helps organizations with various fundraising campaigns, suggests asking questions to fire up creativity:

- What would you do if you had no money, staff, or facility?
- What resources would you be left with, and how could you leverage those?
- Who owes you a favour?

What can you do with what you have in order to make things happen?

There are many grants available for projects of all types and sizes. These can be very helpful as you try to reach your target. The Town of Nanton secured a 50/50 grant with Let Them Be Kids (ltbk.ca/kids) for its community playground. The grant, which gives your community a dollar to buy playground, skate park, or outdoor fitness park equipment for every 50 cents you raise, is available to communities across Canada.

Applying for Charitable Status ... or Not

One important decision you will need to address early in your planning is whether or not to apply for charitable status. Organizations with charitable status have the advantage of being able to issue tax receipts for donations. However, the application process can be arduous, so depending on your timeline and the nature of your cause, doing so may not make sense.

Charitable organizations are required to follow strict guidelines, and you should familiarize yourself with these and keep them in mind whether or not you are designated as a charity. You may be called upon by the government to answer for the funds you collect. For a one-off event, donated monies are treated as gifts in kind to specific beneficiaries. If your project is longer-term or wider in scale, you will definitely want to get charitable status.

In order to obtain charitable status in Canada, it's also a good idea to register as a not-for-profit organization or foundation.

Because our immediate goal focused on a single beneficiary, and also because of our time constraints, we did not apply for charitable status or foundation status for the launch of the Faith for Fern project. We highlighted this fact in all our correspondence and speaking engagements, including our letters thanking donors. One of the reasons we elected to have a trust fund was to ensure that our collection of private donations was fully transparent.

For detailed and up-to-date information on becoming a registered charity, visit the Canada Revenue Agency website: <http://www.cra-arc.gc.ca/charities/>.

Launching a Campaign

When planning a successful campaign—or even an isolated fundraising event—you’ll find that things will go more smoothly if you follow these 10 tips:

1. **Start early.** If possible, allow yourself a few months to strategically plan and promote the campaign. If you have six months, use six months.
2. **Develop a committee mindset.** Depending on the size of the campaign, plan to engage five to ten committed individuals with defined skill sets or passion for the project (and preferably both!).
3. **Map it out.** Starting from your deadline, work backwards to develop a timeline of when things need to be accomplished. Surprises are an inevitable part of campaign planning, but can be kept to a minimum with strategic planning and benchmarks.
4. **Assign and define tasks.** It’s important to outline and define roles and responsibilities for every committee member early on. Each should clearly understand what is expected of him or her and when each project or task is due; such clarity promotes accountability and minimizes duplication. When tasks are not explicitly assigned, they often fall to one person, who then feels as though he or she is carrying the whole load.

5. **Honour the 80/20 rule.** Spend 80% of your time promoting the campaign and 20% of your time organizing it. Do not fall victim to the “build it and they will come” syndrome. People are busy, and they need to understand why they should choose to participate in supporting your cause.
6. **Build in fun.** Particularly when it comes to fundraising events, people are more inclined to take part if doing so gives them an experience they won’t have otherwise. At an event, food and drinks are not attractive enough enticements. Consider entertainment or activities that will encourage attendees to participate and give them wonderful memories to take away from the event (e.g., a hypnotist, dancing, or a live band). For more great ideas on how to incorporate fun, check out Rod Burylo’s book *Awesome Client Events*.⁸
7. **Seek sponsorship.** Consider creating a sponsorship package and start soliciting partners early. Think win-win when looking for a strategic alliance. Businesses will happily support an event that appeals to their target audience. Remember, however, that big companies are frequently hit up for support, so be sure that your presentation clearly explains how aligning with you will also be beneficial to them.

8 “Awesome Client Events,” accessed October 2, 2010, http://www.rodburylo.com/awesome_clients_events.html.

- 8. Develop a bottom line.** No one likes to think about it, but we all have to keep the break-even points in mind. Create a budget at the beginning of the planning stages, and make sure you have a strategy for what to do if you don't meet the break-even point.
- 9. Set goals.** If you don't have a target, you can't hit it! Be realistic, but aim for the high end of what's achievable. With the right people in the mix, you can easily be extraordinary.
- 10. Express gratitude.** This is a critically important step. People need to be thanked—both for donating and for working tirelessly to bring in donations. Collect contact information for sponsors, donors, volunteers, and event attendees, and say thank you, preferably in writing. Thanking people is one of the most powerful things you can do, and will build a solid foundation for future initiatives. Failing to say thank you will make it that much harder to solicit support in subsequent years.

Secrets of Success

Paul Nahirney, of Nahirney & Associates in Edmonton, shares these secrets of his fundraising success:

- **Great leadership.** The most important ingredient for a successful campaign is your leadership team. Choose wisely, as these are the people who will be take your message into the world.
- **Passion.** When people feel passionate about your cause, they'll help. Discover what connects others to your cause by asking people who are already involved. Use that passion in your message and conversations instead of focusing on getting money.
- **Creativity and innovation.** While there is a lot of money out there that is not currently dedicated to a cause, fundraisers have stiff competition. Do something different so you stand out.
- **Building on what you have.** Stop worrying about what you don't have and focus on the positives. You'll still have competition and problems will still arise, but those who ask what they can do rather than wish for an unrealistic solution are the ones who achieve their goals.