

6 Superpowers of a Small Shop Fundraiser Workbook

This workbook is a resource that supports the lessons and activities in the presentation. Please have it handy during the presentation session.

Exercise #1: What's Your Fundraising Manifesto?

A manifesto is a public declaration of intentions, opinions, objectives, or motives. You'll find your fundraising feels more natural, authentic, and ethical when you know your own fundraising manifesto.

Write in the box below, your own personal Fundraising Manifesto:

I believe:
I believe:
I believe:

Captain Impact's Fundraising Manifesto:

- I LOVE to fundraise and I especially love to fundraise with small organizations where I can touch and feel the impact.
- I believe fundraising is, personally, my most powerful way to change the world.
- I believe generosity is at the core of being human.
- I believe giving (of our time or our financial resources) is an act of passion and an expression of our values.
- I believe more people would give if we made the experience good.
- I believe that asking someone to give to a cause that I believe in is one of the most noble and empowering things I can do.
- I believe that giving is receiving and receiving is giving. I have as much to offer a donor as a donor has to offer to our mission.

- I believe that if a donor doesn't embrace my mission, I have a responsibility to help connect them with missions that do matter to them. It is my job to nurture generosity.
- I believe that nonprofits are THE catalysts of change and that nonprofits play an irreplaceable role in our communities.
- I believe that fundraising is NOT a necessary evil or something one must tolerate to get to the real work of your organization. Done right, it IS the real work of your organization--it is how you make your mission a movement!
- I believe that everyone brave enough to work for a movement they believe in is a superhero -- and that we need to start our own movement to OWN OUR CAPES.

Exercise #2: Authenticity

Bernard Ross (<https://www.managementcentre.co.uk/mc-team/bernard-ross/>) is a fundraiser from the United Kingdom. Rather than having people memorize an “elevator speech” about their mission, he encourages people to have an object – something you can touch and feel—as a conversation starter to remind you why your mission matters and to make your work real to people. Think about an object that could remind you of your connection to your mission—especially right now.

Describe your object.	What is the story that it tells?

Exercise #3: Familiarity

As a small organization, you are likely to have a relatively small database. This can be a great advantage, because you can really get to know the people who belong to your movement.

Examples I heard of showing my supporters we see them:	One thing I will commit to trying this month.
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Exercise #4: Know Your Niche

You are the conduit to your supporters understanding your cause. Data can be as powerful as storytelling, if it is concise, powerful, memorable, and repeatable.

<p>If you could have one type of data point or statistic that could really explain your cause, what would it be?</p> <p>Now, how could you go about finding or collecting the data?</p>
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Exercise #5: Engagement

Research shows that to be truly successful over the long haul, a nonprofit organization needs to foster a culture of philanthropy. But, what is a culture of philanthropy and how do we know if we have one? A culture of philanthropy is not based on how much money is raised, but rather reflects an organization where EVERYONE recognizes the value and importance of fundraising and giving.

Organizations don't just "get" a culture of philanthropy. They have to work at it. Have your staff and board take this quick assessment. Compare where you agree and disagree and use the results to identify what you need to work on in the next year.

Sources of Reference: CCS Philanthropy 360, Building a Culture of Philanthropy and Universities UK Checklist: Building a Culture of Philanthropy

1. All Board and staff members can answer 1) the size of our operating budget, 2) our top three sources of revenue, 3) our top expense, and 4) where we are in our fundraising.

<i>Strongly Disagree</i>	<i>Disagree</i>	<i>Perhaps</i>	<i>Agree</i>	<i>Strongly Agree</i>
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2. All Board and staff have their own story of connection to our cause.

<i>Strongly Disagree</i>	<i>Disagree</i>	<i>Perhaps</i>	<i>Agree</i>	<i>Strongly Agree</i>
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3. All Board and staff can easily answer the question of "what's new at our organization" with at least two good examples/stories.

<i>Strongly Disagree</i>	<i>Disagree</i>	<i>Perhaps</i>	<i>Agree</i>	<i>Strongly Agree</i>
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4. All new Board and staff are made aware of their role as ambassadors (beyond other job duties) before they join.

<i>Strongly Disagree</i>	<i>Disagree</i>	<i>Perhaps</i>	<i>Agree</i>	<i>Strongly Agree</i>
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5. The organization is faithful in reminding all supporters throughout the year of the impact of their giving.

<i>Strongly Disagree</i>	<i>Disagree</i>	<i>Perhaps</i>	<i>Agree</i>	<i>Strongly Agree</i>
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6. Donors are always thanked and shown impact before they are asked for additional gifts.

<i>Strongly Disagree</i>	<i>Disagree</i>	<i>Perhaps</i>	<i>Agree</i>	<i>Strongly Agree</i>
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7. We have an annual fundraising plan that includes timetables and goals.

<i>Strongly Disagree</i>	<i>Disagree</i>	<i>Perhaps</i>	<i>Agree</i>	<i>Strongly Agree</i>
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8. We have an annual case for support defining how we are responding to the community's most pressing needs.

<i>Strongly Disagree</i>	<i>Disagree</i>	<i>Perhaps</i>	<i>Agree</i>	<i>Strongly Agree</i>
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9. We have clear fundraising metrics and reports that show our progress.

<i>Strongly Disagree</i>	<i>Disagree</i>	<i>Perhaps</i>	<i>Agree</i>	<i>Strongly Agree</i>
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10. Fundraising goals are set based on prior experience, realistic donor relationships, and assessments of the resources available to reach goals.

<i>Strongly Disagree</i>	<i>Disagree</i>	<i>Perhaps</i>	<i>Agree</i>	<i>Strongly Agree</i>
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11. We offer a variety of ways for people to show their support – from financial gifts to volunteer hours – and all are celebrated.

<i>Strongly Disagree</i>	<i>Disagree</i>	<i>Perhaps</i>	<i>Agree</i>	<i>Strongly Agree</i>
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12. Organizationally, we agree that fundraising (and volunteering) is not just a means to meeting our mission, but rather a part of our mission, because it is an outlet for people to show their support of our movement.

<i>Strongly Disagree</i>	<i>Disagree</i>	<i>Perhaps</i>	<i>Agree</i>	<i>Strongly Agree</i>
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Exercise #6: Big Bang For Your Buck

Small organizations provide clear and direct connections to the work that donations make possible. Understanding your organizations finances is key! So, is working through your own thoughts and feelings about money, so that you are comfortable talking about it with donors.

Describe your first memory of money:

What words or emotions do you feel when you discuss money?

How does your mission need you to feel about money?

What can you do to get there?

Exercise #7: Personality:

Every organization has a personality. Knowing yours can make your fundraising more authentic.

What 3 adjectives would you use to describe your organization's personality:

Exercise #8: Dealing with Our Kryptonite

On the pages that follow you will find a Sample Fundraising Report and a Sample for the Members Matter Exercise to help you deal with some of your organization's kryptonite.

What's your organization's biggest kryptonite:

What is one thing you've learned today that you can use to face that kryptonite with a superpower?

How will you implement this in the next month?

Members Matter Project Sample

NOTE: You will give each Board Member a list of 5 people you would like them to contact, so that they can choose which 2 to reach out to (and have some back-ups if they have trouble connecting!)

Goal: *To learn what matters to our members about our work. This critical information will help us understand more about how we remain relevant in our community and with our supporters and will also help inform our communications strategies. The project will also, hopefully, be fun for all!*

Your Tasks:

1. **Contact 2** of the people on your list and invite them to have a conversation with you about what matters to them about [insert your mission]. You can do this in person, on the phone or Zoom, or as a last resort, via email. (*Sample invitation language below*)
2. **Listen** to their responses to the questions. Take notes! You can use whatever interview style you wish, but the focus is on listening, not making long speeches about what we do.
3. **Share** your notes with [insert your name] – you can scan and email your notes.
4. Please try to **complete your conversations by [insert deadline]**

Sample Script for Inviting Someone to Participate

Hi [insert name]. I am a Board member of [insert org] and I wanted to thank you for your support of our work. I'm interested in learning more about what matters to you about our mission. Would you be willing to meet with me (or talk on the phone – whatever method you are taking)? I promise my questions are not a quiz and they are not an attempt to ask you for more money. I am genuinely curious about what you hope for [our cause] and how you see us most effectively playing a role in making that possible.

The Interview Questions:

1. How would you describe what [insert org name] does? What is important to you about this work?
2. What are you looking for in your relationship with our organization? How involved do you want to be?
3. How could we improve our communications with you? What formats do you prefer for communications? Do you like our printed newsletter? Do you read our monthly e-news?
4. What would you like to know about us that you don't know now?
5. What is your favorite nonprofit organization and why? (NOTE: You are not trying to get them to say your organization. This is a genuine chance to learn about what resonates for them.)

Sample Fundraising Report

Report Date:	20-Sep-13	NOTE: All data here is fictitious - for example only						
Fiscal Year	April 1, 2013 thru March 31, 2014							
Summary:		Gifts by Source						
Annual Fund Goal:	\$750,000	GOAL \$750,000	Revenue Source	Goal	Raised to Date	Balance to Raise	% Raised	
Amount Raised to Date:	\$346,200		Board	\$15,000	\$15,000	\$0	100%	
Balance to be Raised:	\$403,800		Major Gifts (\$500 +)	\$525,000	\$222,350	\$302,650	42%	
Percentage Raised:	46%		Members (under \$500)	\$75,000	\$20,000	\$55,000	27%	
Next Steps:			Special Events	\$20,000	\$16,850	\$3,150	84%	
Goal for Face to Face Meetings This Month	24		Businesses	\$15,000	\$12,000	\$3,000	80%	
Goal for Foundation Applications this Month	2		Foundations	\$25,000	\$15,000	\$10,000	60%	
Goal for Public Funding Requests this Month	3		Public Funds	\$75,000	\$45,000	\$30,000	60%	
Annual Appeal Letter Out	by October 15		GRAND TOTAL:	\$750,000	\$346,200	\$403,800	46%	
Annual Auction	January 18th							
Gifts by Giving Level								
	# of Gifts	Gift Amount	Total Gifts Per Category	# of Prospects	# of Gifts To Date	Amount Raised at This Level	Balance to Be Raised at This Level	% Raised at this Level
Major Gifts 80% of Goal	2	\$100,000	\$200,000	4	1	\$100,000	\$100,000	50%
	4	\$50,000	\$200,000	6	2	\$100,000	\$100,000	50%
	5	\$25,000	\$125,000	9	2	\$50,000	\$75,000	40%
	7	\$10,000	\$70,000	5	3	\$30,000	\$40,000	43%
	9	\$5,000	\$45,000	13	3	\$15,000	\$30,000	33%
Community Gifts 20% of goal	20	\$1,000	\$20,000	35	12	\$12,000	\$8,000	60%
	30	\$500	\$15,000	50	21	\$10,500	\$4,500	70%
	200	\$100	\$20,000	145	28	\$2,800	\$17,200	14%
TOTAL:	1000+	up to \$100	\$750,000	1,767	74	\$346,200	\$403,800	46%
Additional Goals - A place to measure whatever else is important to your organization								
			Goal	Actual to Date				
Number of New Donors			150	64				
Renewal Rate (% who gave last year and renewed this year)			72%	33%				
Thank You Turn-Around Time			3 days	about 5 days				
Total # of Planned Gifts			50	22				