





# NINE STEPS

TO A

# SUCCESSFUL FUNDRAISING CAMPAIGN



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**LORI L. JACOBWITH** 







When you use authentic communication your supporters give more.



Lori L. Jacobwith

Master Storyteller and Fundraising Culture Change Expert

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# INTRODUCTION

Does at least 60% of your philanthropic support come from individual donors?

Do you have an annual donor retention rate of more than 50%? Higher?

Do your individual donors contact YOU to ask, "what else can I do?"

Do more than 25 individuals contribute more than \$10,000 annually to your organization?

If you answered "yes" to these questions, you can stop reading. You don't need these nine steps — you're already living by them.

If you answered "no" to any or all of these questions — I wrote this book for you.

After more than 30 years in the social sector as a fundraiser, executive director, trainer, and coach, I've made my share of mistakes. I'd like to share them with you, so you don't have to make them.

Feel free to make your own new and different mistakes.

There are certainly more than nine things you can do to keep donors engaged and actively supporting your mission.

The nine areas this book is focused on are intended to inspire you as you work to increase individual donor giving.

It's my belief that these nine steps are critical to be certain your fundraising campaign or individual program is realizing its full potential.

These steps may shift your focus from fundraising as a mundane task



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that gets left on the back burner to an inspiring activity. When you and your entire organization are fully engaged in fundraising as a program you will generate considerably more dollars from individuals.

I've kept the story and best practice information in each step brief because I know you're pressed for time.

Read on for my short "soapbox" messages on the key areas of fund development I often find are ignored, forgotten, or simply not being worked thoroughly.

Use these steps as a topic of conversation with your staff, board, volunteers, and even some of your most passionate donors. Add these important topics to meeting agendas and devote time to discussion and implementation.

Some of my favorite source books and tools are listed in the final chapter. I encourage you to check them out to learn more.

Before you dive in let's visit the one common denominator that affects the success of each step: communication.

# COMMUNICATION

## One main thing creates successful individual donor fundraising: Clear, even bold, COMMUNICATION.

Communication that is powerful and clear is absolutely critical for success. I break communication into four key areas.

### 1. Sharing Your Story

### The way you introduce your organization to others.

What story do you tell people about who you serve and why you exist? Do you tell them what it will take (with people & financial support) to keep doing your important work?

Choosing clear, bold, and emotionally-connecting words will help your organization to stand apart and cause people to take action.

### 2. Asking

### Inviting support without feeling like you are always begging for money.

It sounds simple: just ask people to give their time, talent, stuff, or money to support your organization. The reality: asking for money is both an art and a science. It should only be done by those who do it well, which means not everyone should ask others for a contribution. Providing an invitation for someone to support you is just that, an invitation.



What works best is when the person being asked feels as if their gift will make a big impact.

A good "asker" gets a "yes" often. An excellent asker communicates in such an inspirational way they rarely have to ask. Which are you?

### 3. Maximizing Relationships

#### Staying relevant to the people who already support you.

External: Regularly communicate with volunteers and donors to inspire them to stick around. Unfortunately, donor retention in the U.S. has averaged less than 50% for the past 10 or so years.

To entice and inspire donors to stick around will take regular updates about people in your programs. Those updates must clearly show what more there is to do. Pay attention to your regular supporters and communicate so your mission stays relevant for them.

Do you know: Which page on your website is the most visited? Does your newsletter or enews update inspire and teach something new? Do your direct mail and event invitations convey exactly how others can impact one person?

Internal: The way you communicate with your board and staff is where clear and inspiring communication must begin.

Are you clear about expectations in terms of supporting your fundraising efforts?

Do you list specific ways to impact the bottom line; without having to ask for money?

No matter your audience, it's your job to cause them to feel great about their support.

Words matter.

Be intentional about choosing inspiring language rather than utilitarian language. Your goal is simple: Deepen engagement and maximize the relationships you already have.



### 4. Managing Your Data

#### What story does your data tell?

The information you maintain about your supporters is key to building institutional memory. It's truly the foundation for sustaining meaningful relationships with your supporters.

Allow your well-maintained donor database to help you know where to focus your time by providing you with:

- Monthly and event-specific retention and acquisition rates.
- Names, contact information, contact history, and giving history of your longest and largest supporters.

Your donor database is as important as the money you have in the bank. Keeping donor records updated is crucial for taking a good development effort and turning it into an exceptional one.

# THE common denominator for all four steps is: COMMUNICATION.

Too often nonprofit organizations assume everyone knows what they need in terms of money, time, or staff and board involvement. Usually those assumptions are incorrect.

Open, honest dialogue about each of the following nine steps WILL generate more individual contributions.

Clear communication will also provide increased visibility, clarity of vision, and keep your community inspired.

## These steps were designed for groups that:

- Are already a 501(c)(3) organization and able to accept taxdeductible contributions.
- Have already identified programming and are clear how they make a difference to clients, consumers, or members.
- Are interested in learning how, and are willing, to make changes to become more effective in their individual donor communication.



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These steps are simple, and you may think you already understand and are using them. I guarantee there are subtleties within each one that will strengthen your individual fundraising program to make it even more successful.

The most successful fundraising professionals focus on the basics first. Then expand into more detailed systems to build their fund development programs. These steps can be used either as your focus on basics OR to move your organization to the next level of fundraising success.

Study and share these case study stories and steps with your board and your staff, and any other key volunteers at your organization.

And please, go ahead, be brave, try things, make mistakes. Just make sure they're new mistakes, not those highlighted by the stories in this book.



# Leadership

# Successful individual donor campaigns are led by key volunteer and/or staff leadership.

I am a firm believer in the power of one person.

An effort by one devoted human can make a world of difference in many situations. However, a strong, effective individual donor campaign is not a one-person show.

To put it simply, the long-term work that must be done to cultivate and maintain individual donors requires a considerable amount of time. Yes, one person can devote themselves solely to that task—but if the staff, volunteers, and board members don't support them with additional efforts, your fundraising will not succeed.

If you have the resources for development staff, the CEO/Executive Director and the board chair must be the biggest advocates for that staff.

If you don't have a development staff, the CEO and board chair must take the lead to making sure there is a focus on individual fundraising. I believe it is the responsibility of every person within the organization, whether staff, board, or volunteer, to roll up their sleeves and get involved with fund development.

In most of the nonprofit organizations I come into contact with, nearly everyone shies away from the responsibility of taking care of donors as thoroughly and carefully as they take care of their clients.



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Because, as is often the case, when a volunteer or staff is brought on board no one sets expectations for them to participate in development work.

Any time someone is brought into the organization — as a board member, staff, or volunteer — there must be clear and explicit conversations about what's expected of them.

Those expectations might include:

- Soliciting for contributions
- Making a financial contribution themselves
- Giving additional volunteer time
- Making an in-kind contribution
- Serving on the team that makes personal donor thank you calls or sends handwritten notes

Whatever the participation is, that's for your organization to decide. But whatever you decide — make sure everyone knows what is expected.

As you read each story example, don't think I've gone all "Carly Simon" on you; "you probably think this song" — er, story — is about you. It's not.

Or maybe it is.

These stories are based on actual client situations but no real names (human or organization) are used.

# STORY#1 Leadership

# The board supports the programs — in theory.

Anita is a new board member with Children's Health Foundation. She enthusiastically joined the board because she feels every child should have access to healthcare.

At her first board meeting Anita found the small endowment of \$3.5 million was simply not enough to support the work of the foundation.

The members of the 13-person board all love the organization and are honored to do important work on behalf of children's healthcare. But they were not expected to help raise money as part of serving on this board.

Anita is a young professional in her early 30s and is in favor of raising additional funds. She's not at all daunted by the idea of inviting support from the community for such a worthy reason. Sounds like this might be a great idea, right?

And it is. However, no one has ever had a frank discussion with long-time board members to outline what the expectations are in terms of being involved in fundraising.

The very mention of the word "fundraising" causes sweaty palms and a tight stomach for some. In fact, some of the board members have never made their own financial contribution to Children's Health Foundation. As far as they are concerned, the organization has an endowment generating interest, so there is no need for them to give.

I was brought on to "help."

Within a few months, we determined there needed to be some thoughtful conversations with the board before launching an individual fundraising campaign. Because this was a small office (just 2.5 staff) they were likely going to need to hire a staff person to spearhead their fundraising effort.

As it happens, change takes time. During our meetings and discussions, we uncovered that most of the board members had a deep distaste for talking



about and asking for money.

So much time had passed since Anita and the staff invited me in they, themselves, were no longer as excited about the work ahead. Unfortunately, the endowment declined to the point that they're now in desperate need of individual donors.

While the board is proud of the grants they make, pride alone will not generate financial contributions.

Children's Health Foundation decided to pare back the grants for the time being. They agreed to create an annual board agreement and do some training with the board before they launch their \$125,000 annual campaign.

They are moving slowly, but they are moving forward. They are now intentional about expectations. Now this team is working through their fears through ongoing communication.

The good news: the discussion about fundraising has shifted.

New board members are being brought on knowing a personal contribution is part of their board service. Staying in touch with donors is being done on a much more personal level.

Board meetings are spent reviewing retention and acquisition rates of key supporters. And a few individual donor asks have been successful.

All of these changes are setting the stage for a long-term, successful individual donor fundraising effort.



# Successful individual donor campaigns are supported and managed by at least one staff.

For a smaller organization, the sole fundraising staff is often the executive director.

Larger organizations have at least one staff person supporting their fundraising efforts. A team often includes a development director, major gifts officer(s), a grant writer, a database manager, event planning support, and more.

Especially in the early stages of developing an individual fundraising program, it's critical to enlist and encourage others to help with fundraising tasks.

The pool of "workers" can be board members, long-time donors, community volunteers, former staff or board members, and fund development committee members.

There are unlimited tasks to share with others: participating on a solicitation, appeal letter writing, thank you and invitation phone calls, researching donor prospects, planning the annual fundraising event... the list goes on. And on.

When the team is small and concentrated on growth, there is a focus on finding more and more donors. Unfortunately, that often means current donors are neglected.

With an average annual donor retention rate in the U.S. of 48%, it's not a good idea to neglect *any* donors (or volunteers for that matter).



Many smart people I've worked with have made the mistake of putting all their resources into programming.

With a large endowment or large grant from a foundation or corporation can come a level of complacency for fundraising.

We've got plenty right now. Let's worry about securing more money next year or in the final year of multi-year funding support.

I've cringed when I see a new or fast-growing nonprofit focus solely on allocating funds only to their programming and no money or time to fund development. The problem with that is clear:

#### No funds coming in = no new programs going out.

If your organization is serious about continuing to provide quality services supporting the **program** of fund development is necessary.

Programs and services have managers and staff to implement your amazing work, so must your individual donor program have a person to keep your mission and donors' impact relevant and visible.

It's tempting during economic downtimes to reduce or cut funding staff altogether. But that very short-term solution will create long-term problems.

# story#2*Staff*

## I'll do it. All of it.

I'm honored to work alongside visionary, inspiring men and women who are often founders of their organization.

Their vision and dedication amazes and inspires me.

Beth is a founder who has been incredibly successful securing funding from the federal government for medical research.

Unfortunately, she's been ineffective raising any operating funds. Zero is the operating budget for an organization with \$10 million research dollars.

Beth's desire to "do it all herself" has stalled the growth of this important organization.

Beth doesn't yet receive a salary. She's the public face of the organization, often speaking to large groups in the medical community. Slowly a buzz has begun to simmer about outcomes from research the ABC organization has funded.

## What's missing?

- Regular communication with their handful of supporters.
- Messaging that inspires more involvement and unrestricted contributions.
- 1:1 donor solicitation meetings.
- Building a strong board.
- Engaging community members in a committee structure.
- A regular paycheck for Beth's more than full-time work.

The first thing we agreed on is that Beth SHOULD be receiving a salary. Doing all that she does and struggling to make ends meet is currently a hidden cost of running this organization.



Next, we agreed to refresh and reframe messages Beth shares. The best way to stand out in the barrage of communication we all wade through every day is to share an inspiring vision for the future.

Beth wasn't talking about the size of the budget. Nor did she talk about what it takes to manage any of the research grants they've been awarded.

Digging deeper, I found, Beth wasn't actually sure how much time or financial resources managing the grants took. Once we determined those costs, Beth began, slowly, to share a much more inspiring vision.

After multiple conversations about what it would take to grow exponentially, Beth agreed to ask for specific help.

She began inviting passionate supporters to be an ambassador for the ABC organization. When her invitations become more specific, Beth found it easier than she ever imagined to find people willing to volunteer. She invited them to share the newly crafted visionary messages at house parties, via social media and email.

Beth and the board are more transparent about what it will take to "do more." A clear vision for growth is being shared everywhere.

Since making these changes the ABC organization has increased their unrestricted operating budget to nearly \$100,000.

So far, they have more than 300 new donors.

Beth is being paid a small salary with a timeline to pay her a market rate salary within two years.

At least one volunteer ambassador per state has been recruited and trained in the U.S.

A simple communication plan has increased the frequency and clarity of communication. This allows people to regularly see a place for themselves to make a meaningful impact with their time **and** money.

Most importantly, today, Beth doesn't have to do it "all."



# Successful individual donor campaigns have all board members participating in fundraising in some capacity (and I don't mean the "Hey, you're doing a great job" cheerleading role).

Being a board member is not a simple invitation to bestow on people who show up at meetings. Full board participation is critical to the growth, effectiveness, and financial success of your organization.

I can feel cringes and eye rolls as I write this.

I bet I can read your mind, too: "But Lori, you don't know my organization — my board can't/won't agree to give more time or money."

Or, "Our board wasn't recruited to ask for money. I can't ask them to ask others."

Or, "Our board is appointed and can't do fundraising."

The reality is, without FULL board participation and a clear understanding of the fundraising program, your vision of doing more is far more difficult.

What's the best way to engage board members to support your fundraising work?

Recruit with an expectation and accountability discussion. When someone is invited to *consider* joining the board use clear communication about expectations. How? Use a board agreement that is filled out annually. (A link to a free ebook with a sample board agreement

is provided in the resources chapter.)

Before recruiting any new board members, ask yourself if you are providing the following:

- A job description with the board role clearly defined.
- Specific expectations for board members to help raise awareness, and for some, raise money.
- Ongoing training to do any aspect of their board role.

Most importantly do you have at least one advocate on your board who supports efforts to create a successful and engaged board?

Here's what I mean: In the interview process it's critical that both fundraising (the raising of assets) and fund development (raising of visibility and deepening engagement) activities be thoroughly discussed and outlined. New board members must know beyond any doubt that they will be included in the "doing" as well as the giving.

A frequent mistake I encounter is that the development staff is not specific enough — because they haven't discussed it or created a plan around it — about what they want from board members. The board is left to figure out on their own how to "engage" themselves.

It's as though you want me to know how to scuba dive because I love being in the water, but no one ever takes the time to teach me how to do it.

This doesn't mean board members have to spend all their free time directly asking for financial contributions.

In fact, if they aren't good at it, a board member should not ask others for money.

Here are some best practices to follow that will increase your fundraising revenue while engaging board members (and volunteers) in supporting the program of fundraising:

- 1. **Make a financial contribution** of any size. 100% board giving is non-negotiable.
- 2. **Regularly show up** to board and committee meetings. Agree on attendance requirements with the board and track it.
- 3. **Invite others to events**, including the "get to know us" free events. Track this by board member and share at board meetings.

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- 4. Truly act as an ambassador by knowing the names and faces of the top 25 to 50 donors and volunteers. Then seek them out at events to thank and talk with them.
- 5. Make a thank you phone call to recent donors. Research from Penelope Burk indicates when a board member or volunteer phones to thank a first-time donor their second gift increases by nearly 39%. That's fundraising!
- Meet with a current or former donor to thank them for their recent gift. It's not practical to take every donor out; set a minimum donation gift level for this activity.
- 7. Make an introduction to the community affairs person at their workplace.
- 8. Secure a matching gift from their workplace. Often this is as simple as a reminder to fill out a form.
- 9. Share a story about one person's life that's different because of your organization.
- 10. **Deliver a heartfelt but short speech** at their place of worship or civic group meeting to stir up interest in your organization.
- 11. Know and regularly share with others your "money story." This means talking about inspirational and visionary fundraising goals using language like, "Here's what it will take to say yes more often."
- 12. Host a house party to introduce their passion for your organization to their community.
- 13. Write a short article about why your mission is their passion for social media or your enews.
- 14. Hold themselves and each other accountable for what they said they would do.

A quick note about action 5: Making thank you phone calls to donors is not just a nice gesture. It has been shown to increase giving and engage the board at a much deeper level.

In my coaching I make the task of thank you calls an important requirement for every board or development committee meeting.



#### Here's how:

- In less than 10 minutes each person is provided with one or two donors to call to thank. Make sure the numbers work ahead of time.
- Always have a staff member or someone who is comfortable making a call do the first one to show the board how simple it is.
- Remind them to take notes for your data management system (more on that later).
- Some will likely be nervous about it at first. That's okay.
- Remind them their call will likely go to voice mail.
- Be clear that their thank you message to a donor has the power to increase the next contribution AND keep that donor feeling special enough to give again for up to two more years.

I've watched people with sweaty palms dial their first call; have a lovely short conversation with a passionate donor; and then turn around and ask for more names because they enjoyed it so much.

This is a short list of the many ways board members can actively participate in fundraising activities — *without* having to ask others for money.

No matter which activity is chosen, make certain expectations are clear well ahead of time.

Discussion about "which of our own activities should we track?" is an excellent annual retreat topic.

The role of staff (when there is staff) is to assist by regularly providing accurate data so board members can hold themselves accountable for what they said they would do.

## STORY#3 Board Members

# My board won't help with fundraising.

I hear this comment often.

Honestly, over the years, I've become a skeptic about the reality of this statement.

More often than not, when I enter the picture and begin working with board members I encounter passionate, committed professionals. They don't want to do anything wrong. When asked to do something outside their comfort zone some wait for clear direction.

I believe every board member shows up wanting to be successful and make a difference. After a meeting or two the current board culture takes over.

When there are no consequences for lack of attendance at meetings or events; no follow-up about the signed board agreement; and no training in areas that are key for raising awareness, e.g. sharing a mission moment story; board members tune out, get bored and disengage.

A few years ago, Leslie invited me to facilitate an annual board retreat for a veterans' advocacy organization. The intended outcome was re-engaging and deeply connecting the board after a large capital campaign.

Leslie assured me there would be lots of push back and not to have very high expectations of the board.

I did my "prep" work with the board chair, Wayne, and found him to be a smart, professional business owner and veteran. He and Leslie shared their concerns about donor and especially board fatigue after the completion of a \$24-million capital campaign.

When I asked Wayne why he thought the board had disengaged after such a successful campaign he candidly said, "Lori, we don't know what to do next. Most of us are thankful we can stop asking for big gifts. Frankly, we need a break from fundraising."

I paused and said, "Wayne, I understand the fatigue. You worked hard over the past three years.

What if I told you that when the board takes a break from talking with donors — not asking — connecting with them — you'll see a huge drop off in active donors?

But I have some ideas about how to keep donors connected without having to ask for money."

Now I had his attention. "Go on," he said.

"Let's make the retreat a celebration of all the ways it was a success: number of donors, size of gifts, increases in giving and so on," I said. "But how about I also facilitate a conversation about what will keep them giving?"

Wayne's eyes lit up.

He nodded and said, "We haven't really celebrated our own success as a board. And we certainly have never talked about what makes the same people want to give to the annual fund too."

As a business owner Wayne was energized when we talked about the importance of knowing and managing the retention and acquisition rate of donors. Leslie readily agreed to have her staff pull together data and charts that would tell a story about where to focus for the coming six to 12 months.

I invited Wayne to be an active partner in making sure the retreat was a success. He agreed to move things along during the discussions and to help to keep people accountable for attending the session and being on time.

What I modeled for Leslie was to be as specific as possible in engaging Wayne in the areas where he excels.

The four-hour session turned out better than Leslie and Wayne imagined. We had robust discussions about ways to keep donors engaged.

Everyone had an opportunity to share a short mission moment about how their advocacy work affects the life of a veteran they had met.

We reviewed the success of the recent capital campaign and five years of annual fund fundraising outcomes using fun, easy-to-understand visuals.

When I asked the question: "How might this board help to keep current donors engaged?" Discussion ended with agreement that the board would focus on these specific areas:

#### NINE STEPS TO A SUCCESSFUL FUNDRAISING CAMPAIGN

- 1. Quarterly donor retention increases of 3-5% per quarter.
- 2. Inspire current donors of \$5000+ to give again through a series of touch points:
  - Monthly email updates from the board chair about the impact of their gifts. The emails would highlight a short mission moment video clip.
  - Small VIP mission-focused gathering (bill signings, testimony preparation of veterans, visits to facilities benefiting from legislation).
  - Personal thank you calls to donors on the anniversary of their capital gift that include an inspiring mission moment and an update on the current annual funding gap.
- 3. Monitor progress regularly at board, committee, and staff meetings.

There was excitement and a sense of possibility at the retreat. I credit some of the success to the board chair, Wayne. He helped keep discussions focused and drew out some of the quiet and newer board members.

When I checked back with them a few months later they had already seen more than 10% retention increase. Fifty-percent of capital campaign donors had already stepped up to make a contribution to the annual fund.

The staff keeps busy providing clean data and fun visuals at committee and board meetings.

But what was even more exciting to learn, was that more board members are attending and inviting donors to events.

I was proud to learn there has been a total turnaround in board support for fundraising activities.

# ARE YOU READY TO DIVE IN?

Get the rest of Lori's insightful lessons, soap box messages, and examples now! The rest of the steps everthing from Goals, Timelines, and Urgency to Keeping Donors Engaged to Data Management and so much more.

With this book you can use each step as a topic of conversation with your staff, board, volunteers, and even some of your most passionate donors. Add these important topics to meeting agendas and devote time to discussion and implementation.

Get Nine Steps to a Successful Fundraising Campaign today!

Click here to get one copy

Click here for 12-book bundle



# **ABOUT LORI**



The first thing people notice when they meet Lori is her passion for the positive.

She helps find the "it's possible" angle to most any fundraising challenge.

Lori's gifts and talents help executive directors, development directors, and even fundraising committee chairs' communicate powerfully to exponentially increase their fundraising.

Named one of America's Top 25 Fundraising Experts, Lori L. Jacobwith is an internationally-recognized master storyteller and fundraising culture change expert.

Lori has more than 30 years' experience helping nonprofit organizations raise \$300 million dollars from individual donors. And counting.

Not your average speaker or trainer, Lori's poise, humor, enthusiasm, and best practices inspire and electrify. She teaches how to connect with and engage others by doing the same herself.

By sharing easy-to-implement strategies and tools that will inspire even the most-weary or overworked nonprofit staff or board member, Lori make training sessions, keynotes, or board retreats effective and memorable.

A longtime member of the Association of Fundraising Professionals, Lori holds a BA from the University of Minnesota and additional training from Indiana University's Fund Raising School. It's true, Lori has a passion for fundraising — She also has a passion for attending her native Minnesota State Fair — for more than 50 consecutive years.



# NINE STEPS TO A SUCCESSFUL FUNDRAISING CAMPAIGN

LORI L. JACOBWITH has been recognized as one of the top 25 fundraising consultants in the U.S. She is a master storyteller and fundraising culture change expert. With more than 30 years' experience in the social sector she has helped nonprofit organizations raise more than \$300 million from individual donors. And counting.

Feedback about Nine Steps to a Successful Fundraising Campaign

"Lori's Nine Steps to a
Successful Fundraising
Campaign provided the
most comprehensive yet
simple tools I've ever come
across in 30 years of leading
nonprofits. What an effective
and inspiring gift they, and
Lori, are!"

Anonymous national conference attendee

"These nine steps, while simple, are incredibly powerful When Lori shared them at our national conference she exhibited to our members from across the U.S. how to raise more money and communicate powerfully."

—Michele Snyder, Executive Director, Parent Heart Watch

"Lori's coaching and support have been invaluable to the success of our organization. She has helped us design a process that allows us to treat volunteers and donors in a way they deserve to be treated. And we continue to close the gap in our annual operating budget."

—Chuck Meehan, President/CEO, Volunteers of America, North Louisiana

Combining real-life case studies with practical advice, Nine Steps to a Successful Fundraising Campaign provides you with easy-to-use information to help you raise more money than you ever imagined!

In these nine steps, Lori L. Jacobwith will help you change the way you think about fundraising, elevating it from a "have to" task to a vital and engaging activity for you and your entire organization — board, staff, and volunteers!

STEP #1 Leadership

STEP #2 Staff

STEP #3 Board Members

STEP #4 Goals, Timelines, and Urgency

STEP #5 Telling Your Story

STEP #6 Keeping Your Donors Engaged

STEP #7 Money Conversation

STEP #8 Be Specific

STEP #9 Donor Data Management

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