INDEX

A
Acquisition lists. See Mailing lists
Advertising: AdWords on Google, 176; approaches to creativity, 91–99
Aggressive approach: consequences of, 53–54, 56; effect of scenarios with, 50; fundraising with, 45–47
Amnesty International, 196
Andrews, F. Emerson, 13, 14–15
Ansoff’s matrix, 66, 73
Appreciating donors, 132–133, 134–136
Art of the Long View, The (Schwartz), 20

B
Bank of America, 194
Bequests, 16, 182–183
Bernbach, William, 91–93, 97, 98
Better Business Bureau Wise Giving Alliance, 168
Bleeds, 117
Board members, 139
Bonding with donors, 131, 134–136, 193–194
Boston Consulting Group, 66
Boston matrix: applying, 71–73; categories within, 67–68; transforming programs with, 68–71
Budget, including in case for giving, 79

C
Calling donors, 135, 137–146
Cancer Council New South Wales, 149–161, 163
Capital projects, 102–103
Case for giving: defined, 77–80; examples of, 82–83; mission statements and, 79, 84; presenting by telephone, 138; strengthening, 75–77, 190–191; tailoring Web page for specific, 171; whether to ask or not, 84
Cash Cows, 67, 68–71
Center on Philanthropy, Indiana University, 7, 8, 193–194
Chaperoned e-mails, 177–178
Charitable giving. See Gifts
Charity badge, 173
Charity Navigator, 168
Collecting donor information: entering information in database, 162; questionnaire for, 147–148; segmenting survey data, 162–165; sending direct mail questionnaires, 149–161; testing questionnaire, 148–149.
See also Donor surveys
Colleges. See Nonprofit organizations
Collison, Brienne, 112, 115
Color printing, 117
Commingling, 112–113
Communications: applying Boston matrix to, 66–73; case for giving examples, 82–83; creating case for giving, 77–80; cutting costs of, 105–106, 110–111, 115–118; donation followups with same channel, 121–122; evaluating online costs, 113–114; leads for segmented, 164–165; strengthening donor motivation, 75–77, 190–191; tailoring to donor segment, 128–129; triggering donor motivations, 80–81; using multiple channels for, 184; whether to ask or not, 84. See also Case for giving; Direct mail; E-mail; Online communications

Contributions. See Gifts

Cost cutting: communications, 105–106, 110–111, 115–118; cost vs. cost-effectiveness, 163, 165–166; defensive fundraising approach and, 40; determining what to cut, 63–65; developing creative packages, 99, 191–192; donor acquisition programs and, 106–107; evaluating fundraiser profitability, 103–104; exchanging acquisition lists, 107–108; front-end premiums, 109–110; holds on capital projects, 102–103; online communication costs, 113–114; outsourcing in-house tasks, 106; printing practices for, 110–111; reactivating lapsed donors, 108–109; reducing postage expenses, 112–113; refining, 101–102, 192; rethinking major vs. small donors, 104–105; reviewing staff and organization, 103; trimming telemarketing costs, 113

Cost-effectiveness: costs vs., 163, 165–166; designing communications for, 116–117; Internet presence and direct mail, 168; measuring major fundraisers, 103–104


Cultivating donors: aggressive strategies for, 45–46; appreciating midrange donors, 183–184, 187; bonding donors with organization, 131, 134–136, 193–194; defensive strategies and, 40–41, 51–53; effect of program cutbacks for, 64–65; recruiting monthly donors, 173; selective strategies and, 43, 44; tracking interests and behaviors online, 172. See also High-dollar donors; Relationships with donors; Small donors

Databases: entering donor information in, 162; integrating organizational, 187; outsourcing file maintenance, 106

Defensive approach: consequences of, 51–53, 56; effect of scenarios with, 50; fundraising with, 39–41

Depressions: best fundraising practices in, 189–197; philanthropic trends in, 12–15

Designing: cost-effective communications, 116–117; donor questionnaires, 147–148
Direct mail: aggressive approach and, 46; cleaning mailing lists, 111–112; components for testing, 90; cultivating midrange donors, 183–184, 187; cutting costs of, 115–118; defensive approach and, 40; donor acknowledgments and, 132–133, 134–136; envelope color for, 87–88; evaluating long-term donor value for, 106–107; finding legacy donors via, 183; “high-dollar mail” returns, 105; integrating with other approaches, 185–186; leads for segmented communications, 164–165; online communications with, 167; postage expenses for, 112–113, 118; preceding with e-mail messages, 172; questionnaires in, 149–161; reactivating lapsed donors, 108–109; responses to, 184; selective strategy for, 43; sending to high-dollar donors, 127; testing teasers for, 88–90; using creativity in, 86, 87, 91–99, 191–192. See also Mail- ing lists
Discussion boards, 145–146
Dogs, 67, 68–71
Donations. See Gifts
Donor consultation groups, 144–145
Donor surveys: direct mail, 150–161; inexpensive, 143–144; online, 145–146; segmenting data from, 162–165
Donors: calling personally, 135; components triggering motivations, 80–81; contacting regularly via e-mail, 171; cost cutting and acquisition programs for, 106–107; cultivating midrange, 183–184, 187; delaying fundraising requests to, 84; describing benefits of gifts, 81; exchanging lists of, 107–108; expressing appreciation for, 131, 132–133, 134–136, 193–194; finding high-dollar, 122–127, 192–193; giving feeling of inclusion, 136; giving patterns of, 182–184; inexpensive marketing research on, 140–141, 142–146; locating big, 120–128, 192–193; making random calls to, 140–141, 142–146; personalizing appeals to, 135, 164–165, 194–195; reactivating lapsed, 108–109; reconsidering magazine for, 105–106; recruiting monthly, 173; requesting testimonials from, 174–176; researching nonprofit Web sites, 168; response to telefundraising, 138; rethinking major vs. small, 104–105; strengthening motivation to give, 75–77, 190–191; tracking interests and behaviors of online, 172; using multiple channels for giving, 184; what they want, 76. See also Collecting donor information; Cultivating donors; Relationships with donors
Doyle Dane Berbach, 91
Driving forces, 22–23
Duell, Charles H., 17

E
Economic recovery scenarios: effect of economic strategies on, 49–57; Happy Times Are Here Again, 27, 28–30; impact on nonprofits, 35–38; Misery Loves Company, 28, 32–35, 50; On
the Road Again, 28, 31–32, 50; overview, 27–28; table of approaches and, 50
Economy: best practices for tight, 189–197; effect of downturns on nonprofits, 14–15; factoring in scenario planning, 23; historical perspectives of, 5–7; markers for correlating fundraising with, 7; name recognition in difficult, 36. See also Depressions; Economic recovery scenarios; Recessions
E-mail: chaperoned, 177–178; collecting addresses, 169, 170, 172; contacting supporters via, 171; fundraising by, 169; integrating with other approaches, 185–186; thank-you’s via, 170
Emotional motivation, 80
Envelopes: colors of, 87–88; inserting pieces in, 117; plain vs. creative, 98–99; types of, 116
F
File maintenance, 106
Foundation grants, 9
Frequency of donations, 121, 122–123
Front-end premiums, 109–110
Fundraising: applying Boston matrix to, 66–73; assessing need for integrated campaigns, 179–181; best practices summarized, 189–197; costs of online, 113–114; delaying requests, 84; economic markers for correlating, 7; effectiveness of front-end premiums, 109–110; exploiting multiple channels for, 184; finding significant testing factors, 87–91; integrating approach to, 185–187, 196–197; making case for giving, 79–80; making sure projects make money, 103–104; reassessing, 190; sticking with what works, 86–87; triggering donor responses to, 80–84; using high-priority testing for, 86, 87. See also Case for giving; Direct mail; Fundraising strategies
Fundraising strategies: aggressive approach, 45–47, 53–54; defensive approach, 39–41, 51–53; selective approach, 41–45; table of approaches and scenarios, 50
G
Gang-printing communications, 110–111
Gathering information, 22, 26
Gifts: communicating use and benefits of, 81; direct marketing for larger, 104–105; donor giving patterns, 182–184; during Great Depression, 15, 16; expressing benefits to donors, 81; giving levels, 121, 123–124; legacy, 33–34, 182–183; making Web contributions easy, 170, 171; outsourcing processing of, 106; phoning after receiving first, 139–140; recessions and corporate, 10; thanking donors for, 132–133, 135
Google Grants, 114, 173–174, 176
Grants: foundation, 9; Google Grants, 114, 173–174, 176
Great Depression, 12–15
Great Nonprofits, 175–176
Greenpeace, 196
GuideStar, 168
H
Happy Days Are Here Again recovery scenario: Aggressive
approach with, 54; future effects with, 28–30; overview, 27; Selective approach in, 55; winning strategy for, 50
High-dollar donors: direct mail responses and, 105; finding, 122–127, 192–193; rethinking small vs., 104–105
Human Rights Campaign, 196

I
Information silos. See Silo fundraising
Institutions. See Nonprofit organizations
Integrated fundraising campaigns: assessing need for, 179–181; reasons for, 181–184; suggestions for, 185–187
International nonprofit organizations, 37

J
Jones, John Price, 12, 14

L
Lapsed donors: phoning, 140; reactivating, 108–109
Legacy gifts, 33–34, 43, 182–183

M
Magazines, 105–106
Mailing lists: cleaning, 111–112; collecting e-mail addresses, 169, 170, 172; criteria for segmenting, 120–122; exchanging, 107–108; increasing with chap- eroned e-mails, 177–178; locating high-dollar donors from, 120–129; segmenting, 119–120; testing, 90
Major gift officers: calling all donors, 138–139; measuring effectiveness of, 103–104; rethinking differences in donors, 104–105
Mal Warwick Associates, 89
Marketing: applying Boston matrix to, 66–73; evaluating with Ansoff’s matrix, 66, 73; incorporating case for giving in, 78; inexpensive donor research ideas, 140–141, 142–146; securing gifts of $1,000 with direct, 104–105. See also Direct mail
Maslow, Abraham, 80
Mechanical artwork, 118
Members: acquisition of, 43; surveys of, 143–144, 145–146. See also Donors
Mercifully Brief, Real-World Guide to Raising $1,000 Gifts by Mail (Warwick), 105
Midrange donors, 183–184, 187
Misery Loves Company recovery scenario: Aggressive approach with, 53; consequences of Defensive approach with, 51; future effects with, 32–35; overview, 28; Selective approach in, 54–55; winning strategy for, 50
Mission statements: describing how donations fulfill, 81; including in case for giving, 79, 84
Motivation: strengthening donor’s, 75–77, 190–191; types of, 80
MoveOn.org, 177
Multiple fundraising channels, 184

N
Name recognition, 36
Newsletters, 105–106, 135, 170
Nonprofit organizations: basing decisions on results, 187–188; bonding donors with, 131, 134–136,
193–194; boosting income with segmentation, 128–129; collaborative print runs with other, 110–111; countercyclical giving to, 10; creating case for giving, 77–80; delaying requests for funds, 84; determining what to cut, 63–65; donor research of, 168; effect of Great Depression on, 14–15; effect of recession on, 36–38; exchanging acquisition lists, 107–108; holds on capital projects, 102–103; impact of recovery scenarios on, 35–38; information silos within, 179–181; integrating fundraising within, 185–187, 196–197; outsourcing in-house tasks, 106; reactivating lapsed donors, 108–109; reassessing, 61–63, 73; refining cost cutting for, 101–102, 192; requesting Web testimonials for, 174–176; reviewing staff and, 103; telemarketing costs, 113; what donors want from, 76

O
Obama presidential campaign, 177, 196
Ogilvy, David, 91, 94–98
Ogilvy & Mather, 91
On the Road Again recovery scenario: Aggressive approach with, 53–54; consequences of Defensive approach with, 51; future effects with, 31–32; overview, 28; Selective approach in, 55; winning strategy for, 50
Online communications: costs of, 113–114; starting online newsletters, 170; surveying donors, 145–146; updating sites regularly, 177; using with direct mail, 167. See also Web sites
Online fundraising: characteristics of, 168–169; inexpensive steps for, 170–176; integrating with other approaches, 185–186; making contributions easy, 170, 171, 195–196; promoting special events online, 169; response to, 184, 195–196; setting short-term goals for, 177; strategic drivers for, 169–170
Open house, 136
Outsourcing in-house tasks, 106
P
Paper samples, 118
Pareto Fundraising, 149
Pareto principle, 193
Penman, Dr. Andrew, 149
Personalization: calling donors personally, 135; focusing donors to specific Web page, 171; personalizing communications, 164–165, 194–195
Petitions, 172
Philanthropy. See Nonprofit organizations
Planned giving, 43
Political factors, 23
Postage expenses, 112–113, 118
Predictions: difficulties with, 17–18; effect of recession on nonprofits, 36–38. See also Scenario planning
Printing costs, 110–111, 115–118
Privacy statements, 160
Problem Children, 67, 68–71
Program reassessments. See Reassessments
Proofs, 116
Q
Questionnaires: designing, 147–148; entering information in database, 162; example of, 150–161; sending as direct mail, 149; testing, 148–149
Questions for scenario planning, 20–21, 26

R
Rational motivation, 80
Reassessments: Ansoff’s matrix for, 66, 73; Boston matrix for, 66–73; determining what to cut, 63–65; including human factors in, 72; options in, 62; overview, 190; recognizing need for, 61–63, 73; selective fundraising strategy and program, 42
Recency of donation, 121, 122–123
Recessions: best fundraising practices in, 189–197; charitable giving in, 7–12; predicting effect on nonprofits, 36–38; temporary nature of, 6
Red Cross, 195
Relationships with donors: cultivating, 131, 134–136, 193–194; learning more about donors, 162–165; online communications and, 167–169, 178; personalizing appeals, 135, 164–165, 194–195; randomly calling donors, 140–141, 142–146; sending thank you’s, 132–133; telefundraising, 137–142; tracking interests and behaviors of online donors, 172. See also cultivating donors
Revolution in the Mailbox (Warwick), 107
Rolls Royce, 94–97
Royal Dutch-Shell, 19

S
Salvation Army, 195
Scenario planning: about, 19–20; aggressive fundraising strategy, 45–47, 53–54, 56; comparing strategies, 55–57; defensive fundraising strategy, 39–41, 51–53, 56; defined, 19; economic recovery scenarios, 27–38; exploring broad trends, 22–23, 26; finding fundamental question, 20–21, 26; fundraising strategies, 39–48; gathering information, 22, 26; listing unknown factors, 21–22, 26; selective fundraising strategy, 41–45, 54–55, 56; steps in, 20–26; summary of, 26; table of winning strategies, 50; testing strategic choices with scenarios, 24–25, 26; write stories, 23–24, 26
Schoewe, Peter, 187–188
Schwartz, Peter, 20
Search engine optimization (SEO), 176
Segmentation: analyzing survey data with, 162–165; benefits of, 128–129; criteria for, 120–122; finding high-dollar donors, 122–127, 193; reasons for, 119–120
Selective approach: consequences of, 54–55, 56; effect of scenarios with, 50; fundraising with, 41–45
Self-actualization, 80
Sharpe, Jr., Robert F., 12, 14–15, 16
Sharpe Group, 12–15
Silo fundraising: breaking down, 185–187, 196–197; factors encouraging, 179–181. See also Integrated fundraising campaigns
Small donors: giving patterns of, 182–184; recruiting monthly gifts, 173; rethinking, 104–105
Social factors, 23
Source of donation, 121–122
Special event promotion, 169
Spiritual motivation, 80–81
Staffing: human factors in reassessments, 72; information silos within, 179–181; measuring effectiveness of major fundraisers, 103–104; reviewing, 103
Standard & Poor 500, 7, 8
Stars, 67, 68–71
Strategies. See Fundraising strategies
Suzio, Dan, 114, 115–118
Teasers for direct mail, 88–90
Technology factors, 23
Telefundraising: donors responding to, 184; integrating with other approaches, 185–186; preceding direct mail with calls, 172; relationships with donors and, 137–142
Telemarketing: attitudes toward, 137; costs of, 113
Testimonials, 174–176
Testing: creative vs. simple packages, 99; direct mail campaigns, 90; finding significant factors for, 87–91; high-priority, 86, 87; questionnaires, 148–149
Testing, Testing, 1, 2, 3 (Warwick), 90
Thank you’s, 132–133, 135, 170
“Thank-a-thon”, 139
UNICEF, 195
Universities. See Nonprofit organizations
Values and vision, 77, 79
Videos, 177
Volkswagen, 91–93, 97
Warwick, Mal, 89, 90
Web sites: contributions via, 170, 171; need for compelling, 169; online testimonials for, 175–176; optimizing traffic to, 176; requesting testimonials for, 174–176; researching organization on, 168; response to online fundraising, 184, 195–196; specific pages for each case for giving, 171; sponsoring AdWords or banner ads, 176; updating regularly, 177; widgets for, 174. See also Online communications; Online fundraising
Widgets for Web sites, 174
Writing stories for scenario planning, 23–24, 26
YouTube, 114