

B R O W N   S C H R O E D E R  
*& Associates, Inc.*

# Creating a Powerful Fundraising Program

SAN FRANCISCO, CHICAGO, PHILADELPHIA AND LONDON

# *Language of Fundraising Campaigns*

- **The language of fundraising campaigns borrows heavily from classic military literature.**
  - Initiatives
  - Engagements
  - Objectives
  - Targets
  - Assets
  - Strategy
  - Tactics
  - Even the word “campaign” itself
- **The language of your fundraising campaign should evoke a sense of purpose and a sense of urgency.**

# Overview

- To meet objectives – defined as securing a given dollar total within a specified timeframe – develop an activity plan that is purposeful, sustainable and measurable.
- The best plan for a well-orchestrated effort is integrated into the organization's history, culture and operations.
- It is vital that your plan remain dynamic and adaptable to changing conditions and emerging opportunities. In other words, it is more a game plan than a blueprint.

# Step One: Assessment

- Understand your organization's history and culture
- Assess fundraising activities and results and determine what worked well, what didn't and why?
  - Who are the organization's supporters?
  - Who is the target audience for the campaign?
  - How effective have we been in reaching them?
  - What are the organization's strengths?
  - What challenges or obstacles have prevented it from being more successful in fundraising?
  - What are current stewardship practices?
    - Acknowledgment, recognition, reporting, further engagement of donors.

## *Step Two: (a) Review and Refine and (b) Address the Audience*

- **Review and refine messages and communications**
  - Institutional priorities tied to vision and mission
  - Impact of proposed objectives
  - The case for support
  
- **Address the audience**
  - Design a plan that builds on existing strengths
    - Perform prospect research for leading supporters.
    - Develop time-specific next steps for cultivation, solicitation, and stewardship of key prospects.
    - Identify additional prospects and suspects by researching donors to other organizations with broadly similar purposes.

## *Step Three: Testing Interest*

- How do the people who will most likely support the effort react to the case presentation?
- Volunteer recruitment
- Feedback from supporters
- Further refinement of the case message

# Step Four: Training

- Board members and volunteers should be able to make a compelling case for the campaign, and should receive formal training to become effective solicitors.
- **Training will include:**
  - The importance of one's own commitment
  - Introduction
  - Getting the appointment
  - Making the case
  - Solicitation
  - Follow-up, including reporting and debriefing
  - Getting past objections and understanding the various meanings of "no"

# *Tools for Volunteers*

- Case statement
- Informational brochures
- Giving opportunities
- Table of gifts needed
- Templates of introduction and follow-up letters
- Reports from staff on assignments

# *Tools for Staff and Management*

- Clear, concise reports
- Moves management steps
- Affiliation calculus
- Table of gifts and prospects needed
- Timeline of activities

# THANK YOU

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