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CONSULTING

Resource: **Individual Giving**

The Only Kind of Fundraising That Matters

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Originally published by the National Mentoring Center in “Sustainability Planning and Resource Development for Youth Mentoring Programs,” a comprehensive guide to planning for, and securing future funds to keep your mentoring program thriving. On the web at <http://www.nwrel.org/mentoring/pdf/sustainability.pdf> (878K file).

CHANGING THE GAME: Time, Talent, and Treasureⁱ

If mentoring programs are going to get serious about sustainability then we need to get serious about asking people for the resources we need to do it. In this section, it is my goal to change the way you think about fundraising. I am going to convince you that asking people for money is easier than you think and the rewards are always greater than you expect. And I’m going to show you how to do it.

Let me begin by telling you upfront that I love asking people for money. I know you think I’m crazy, but I really do enjoy it. I think it creates an opportunity to strengthen relationships and build a broader base of support for the critical work being done in our programs.

Most of the time I will be talking about raising money because that is what most of our programs need. Sometimes, however, we could benefit from other kinds of resources. So when I write about money here, go ahead and think time, talent, and money (or, rather, treasure).

I want to help you find new and creative ways to identify and recruit new mentors and other volunteers; tap into their wisdom, experience, and skill sets for the benefit of your program; and, most importantly, raise all of the money your program needs to both survive and thrive!

Heart + Head = Passion-Raising

I believe that raising money from individuals involves two key elements. The more important of these elements involves the heart (yours and theirs) and speaks to the passion, caring, and commitment that people bring when stepping up to get involved with issues and concerns they care about. The second element involves your head and requires a commitment to creating the right system for managing your resource development program.

ⁱ Originally Published in 2005 by the National Mentoring Center in “Sustainability Planning and Resource Development for Youth Mentoring Programs.” On the web at: <http://www.nwrel.org/mentoring/pdf/sustainability.pdf>.

Let's start by talking about passion—the true heart side of this equation. For most of us, we get into mentoring work because it connects us directly to things we care about. In my workshops, I ask folks to include in their introductions one thing about which they are passionate—personal or professional. What gets them up in the morning and is in their thoughts as they go to sleep at night. Take a moment and ask yourself, right now. What drives you to push yourself, to exceed expectations, to dream big dreams?

This may be one of the most important lessons I have to offer so I hope you reflected on the question. If you did, I'll bet you're sitting there right now with a big smile on your face. If you were feeling tired, I'll bet you have more energy all of the sudden. You're probably feeling warm, maybe a little anxious, perhaps even restless. You want to get up and get moving! That's what passion does. It wakes us up. It drives us. It changes us and it changes the world.

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I think the measure of a truly spectacular person—a leader in their field, a devoted parent, a gifted child, a teacher, an agent of change—is always reflected best in their connection to their own passion. Our work in the social-profit sectorⁱⁱ is about making the world a better place for the people who are hurting and suffering now and those who will inhabit the world when we are gone.

Passion fuels our work. It sparks our dreams. It gives us hope. It fires our imaginations. Passion gives us the courage to do, to give, and to share. Forget the language of raising funds, talk about raising passion! The money will come. The volunteers and their time and their wisdom will come. The resources you need will come when you are in the business of raising the passions of the people connected to your work.

As for the second element—the head part of the equation—you need to be able to identify these connected people (your prospects) and track their passion and their giving. You'll want to be able to express gratitude to these individuals regularly so you'll need to manage their contact information. And you'll want to learn and remember why and how they got connected so you can build and strengthen these relationships over time. You'll need some sort of system. It does not have to be complicated. It does not have to be expensive. You can start simple and small and the system can change, and adapt, and expand as the passion for your work grows. I'll offer you some tools for this part of the work in a later section, so please do not get overwhelmed here.

This “system” piece often causes organizations so much anxiety that any effort to begin building a constituency of individuals gets sidetracked by fears of not being ready. Don't be afraid to talk to the people who care about your work; and don't be afraid to ask them for help. They don't need your system (or you) to be perfect. They do need to know that their resources will be put to good use and that the organization is well-managed. More importantly though, they need to see your passion and they need you to help unlock their own.

Shifting the Paradigm

When I'm teaching people how to raise money from individuals, I spend a lot of time proving to participants that it is worth the effort to shift their thinking when it comes to raising money.

ii I will use social-profit, rather than non-profit, throughout this piece to emphasize the importance of our sector. Our work actively creates benefits for society, it generates a new kind of profit, and it adds value. This language better captures the work that we do and it often resonates well with individual donors.

I'm going to do the same here and I ask that you really spend some time thinking about what you are going to read. Suspend your disbelief for a few minutes and imagine that what I am going to share with you might actually be true!

Now if you were with me in a workshop setting, I would begin by asking you if you know where the money that funds your program actually comes from—how it breaks down by source or stream. Do you know? This is information that you need to have regardless of your role in the organization. If you don't have the answers, the next time you're in the office, ask someone who does.

Why is this breakdown important? First, let's agree that where the money comes from usually impacts how the program has developed, how it operates, and how decisions get made which may affect sustainability. Money isn't the only factor, but it certainly is an important one.

Second, knowing where your money comes from now is key to helping you make better-informed decisions about fundraising strategy in the future. Specifically, the percentages I will discuss are important indicators of your potential for creating a diversified—and therefore more sustainable—resource base.

For most organizations, the percentages from private sector sources are heavily skewed in favor of corporate and foundation dollarsⁱⁱⁱ. Assuming this is true of your organization as well, let's get started by taking a few minutes to help you understand how you measure up against actual giving statistics in the United States.

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LESSONS LEARNED

Paradigm Shift One: Show Me the Money

If you're like most people, you'll be surprised at just how much private money is donated to charitable organizations (including religious institutions) on an annual basis. This is money that comes from individuals, foundations, and corporations. It does not include government money.

There are many great sources for this data, but I prefer the analyses offered by two organizations, Independent Sector^{iv} and the Giving USA Foundation of the American Association of Fundraising Counsel (AAFRC)^v. These two groups are the primary sources for the following data.

iii For our purposes here, we won't concern ourselves with public (government) resources, though you will want to include them in your overall development plan.

iv INDEPENDENT SECTOR is a nonprofit, nonpartisan coalition of approximately 500 national organizations, foundations, and corporate philanthropy programs, collectively representing tens of thousands of charitable groups in every state across the nation. Its mission is to advance the common good by leading, strengthening, and mobilizing the independent sector. On the web at www.independentsector.org.

v THE AMERICAN ASSOCIATION OF FUNDRAISING COUNSEL is a professional organization that enhances the visibility, utilization, professionalism, growth and effectiveness of its member firms. On the web at www.aafrc.org.

Most people guess that total giving in the United States is between 10 and 25 billion dollars. Analyzing IRS data for 2004 (the most recent year for which we have the information), however, paints a very different picture.

In fact, according to the AAFRC, Americans gave just under \$249 billion dollars to charitable causes in 2004, up from \$241 billion in 2003, or more than 2% of total U.S. gross domestic product (GDP). This is a lot of money!

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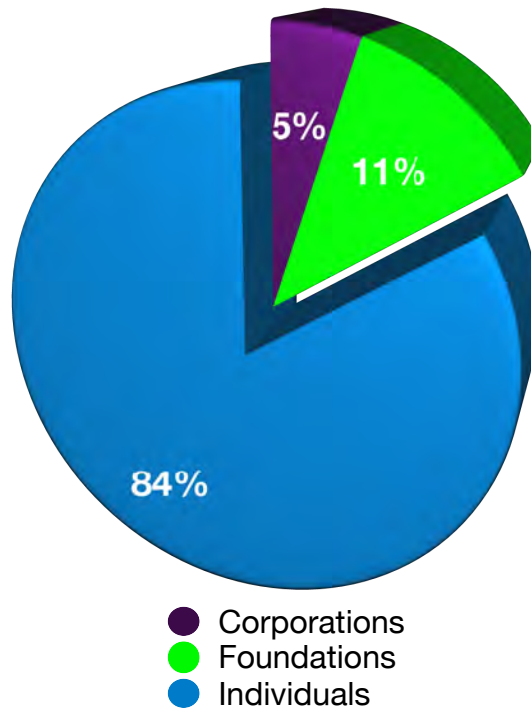
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Who Gives? (Chart 1)

2004 Giving: AAFRC Trust for Philanthropy/ Giving USA 2005

Now that we know just how much money is out there for us to tap into, we need to know who's giving it. In the next section, I'll talk about who's getting it. In 2004, the primary sources of charitable contributions can be broken down into three primary streams: corporate, foundation, and individual (including planned—after-death) giving.

Corporate giving only amounted to about five percent of the \$248.52 billion total, or \$12.00 billion in 2004. Foundation giving was about 11% or \$28.80 billion in that same year.

Individuals accounted for the rest of the contributions, a whopping \$207.72 billion or 84% of total giving!

Let me tell you a few other things about individuals and giving (from Independent Sector's website):

- ★ Nearly nine out of ten American families make charitable contributions (89%).

- ★ Americans report that being asked to give makes a substantial difference in the size of their gifts. Yet 44% of households were not asked to contribute, indicating untapped potential to increase giving.
- ★ In the United States, more people donate money than vote in national elections.
- ★ Two-thirds of US donors (86 million) file the IRS short form and do not receive a deduction for their charitable giving.
- ★ When donors do itemize (at every income level) they give at least 40% more.

So what's my point? Why do I care so much about individual giving? Perhaps the well-known 1950's bank robber, Willie Sutton, answered it best when asked why he robbed banks:

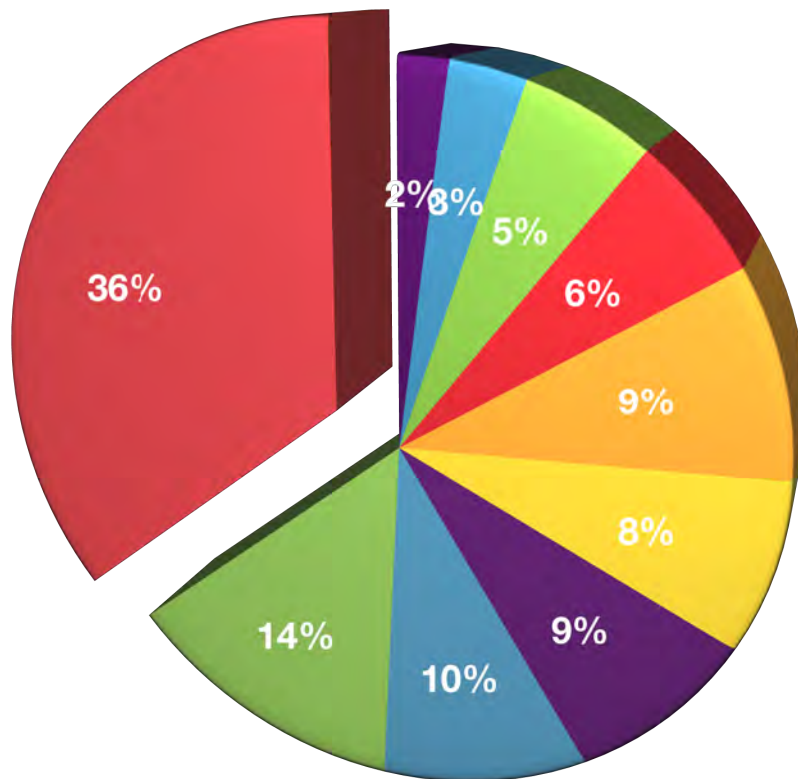
"Because that's where the money is!"

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- International Affairs
- Environment/Animals
- Public-Society Benefit
- Arts & Culture
- Unallocated
- Human Services
- Health
- Foundations
- Education
- Religion

Who Gets? (Chart 2)

2004 Giving: AAFRC Trust for Philanthropy/ Giving USA 2005

In terms of where the \$249 billion in charitable giving goes, the chart above is self-explanatory, but I do want to draw your attention to an important point.

It is probably no surprise to you that religious institutions receive the majority of contributions in the United States. Why? They ask at every opportunity and they ask with a sense of purpose, with passion, and with an expectation that congregants will find meaning in their gifts.

I went through a period a couple of years ago when I was attending a variety of religious services with friends. I felt like it was important to get to know more about them through their spiritual lives. One of the unexpected benefits for me professionally was a much greater understanding of how religious leaders connect raising money with their sacred, spiritual missions.

I went to one church service with a friend—it happened to be a Catholic Mass—and I was stunned when they passed the offering plates THREE times during the course of that one-hour morning service. I was even more surprised when the priest reminded parishioners at the end of the service not to forget that their annual tithes were also due.

At another service—this one Methodist—the minister announced at the beginning of tax season that annual giving statements were available in the church office, or they could be faxed, mailed, or e-mailed by request. A Jewish synagogue I visited published the amount of the previous week's collection and statistics (including pie charts) about how that week compared to previous weeks and even the previous year. It is not unusual these days for churches to have capital campaigns, building campaigns, special offerings in times of crisis, endowments, etc.

We also know that many faith communities engender a sense of ownership among their congregants and that this is a powerful tool for mobilizing resources. It is the members of a church that build the cathedrals and turn on the lights and decorate the altar and pay the staff and feed the hungry and clothe the poor.

In fact, a 2001 survey and subsequent report^{vi} by Independent Sector and the National Council of Churches, Faith and Philanthropy, found the following:

- ★ Over 85 percent of religious-giving households support secular (nonreligious) charitable organizations (probably like your program);
- ★ Fifty-two percent (52%) of all households give to both religious congregations and secular organizations, and those households account for 81 percent of all donations;
- ★ Households that give to both types of institutions give more to religion (\$1,391) compared to households that only give to religion (\$1,154); and
- ★ Fifty-five percent (55%) of dual-giving households give to at least two other kinds of organizations

You can give people an amazing gift when you ask them for their time, talent, or treasure. You honor them with your request. You strengthen the relationship. You support their other interests and commitments (including their faith). And you embrace and share a belief in their power to make a difference in the world.

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vi On the web at: <http://www.independentsector.org/programs/research/faithphilanthropy.html>.

A Special Note About Volunteers

I know how important volunteers are to the social-profit sector and especially to mentoring programs, and I'm sure you share my appreciation for your volunteers as well. I think it is important, however, that I take a few minutes to push this particular aspect of paradigm shift one a little further.

In 2004, according to Independent Sector, the value of a volunteer's time reached \$17.55 per hour^{vii}. This year's estimate increased from \$17.19 per hour in 2003 and it has gone up every year since the calculation began in 1980.

Nationally, Independent Sector estimates in 2004 the total value of hours volunteered was equivalent to approximately \$272 billion of contributed service, assuming the total number of volunteer hours held constant from previous years.

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First, let me say that I hope you are using this very important number in your development efforts. Your donors (and your foundation and corporate partners) should know the value of your in-kind support. For example, a program with just 20 volunteers each donating one hour a week has in-kind support of \$18,252!

According to Giving and Volunteering in the United States 2001^{viii}, 83.9 million adults (44% of the population) volunteered their time to a charitable organizations in 2000, averaging 3.6 hours per week. This resulted in 15.5 billion donated hours. They also found that only 50% of adults were asked to volunteer and that 63% of adults volunteer when asked.

Second—and this will be challenging for some of you—your volunteers are perfect prospects for becoming donors! That's right! They can give time, talent, AND treasure.

But don't take my word for it, Independent Sector's report looked at this issue as well and found the following:

- ★ Eighty-nine percent of households gave charitable contributions in 2000.
- ★ The average contributing household gave \$1,620, or 3.2 percent of household income. About 42 percent of respondents reported they both gave and volunteered, with another 46 percent of all households reporting they contributed only.
- ★ Households in which the respondent both donated and volunteered gave substantially more than households in which the respondent did not volunteer.
- ★ Adults who became involved with giving and volunteering in their youth (before the age of 18) maintained that involvement into adulthood. Higher percentages are givers as adults, 92 percent compared to 82 percent of those who did not give and volunteer in their youth, and the average household contribution is much higher, \$1,869 compared to \$1,219.

vii The hourly value of volunteer time is based on the average hourly wage for all non-management, non-agriculture workers as determined by the Bureau of Labor Statistics, with a 12 percent increase to estimate for fringe benefits.

viii On the web at: <http://www.independentsector.org/programs/research/gv01main.html>. For giving households, the average contributions were \$2,295 from volunteers and \$1,009 from non-volunteers.

Paradigm Shift Two: Excite Their Passions and Raise More Money

A moment ago, I showed you how our spiritual leaders understand the necessary connection between resources and making the world a better place. They have gotten over the fear of asking by trusting their faith and believing that raising money from people is not “a necessary evil,” as many of us often think. They know that raising money is part and parcel of the mission of their church for them. It is why they have missionaries. Giving control of one’s self over to a higher power and giving of one’s resources over to the church has become a sacred part of the tradition and an integral component of the faith for millions around the world (regardless of the denomination). People give because they believe that their gifts will be multiplied and that those resources will make the world on earth more just and more fair and more safe and more like . . . heaven.

Our work is sacred, too. And we know that people want to be a part of something wonderful that is larger than just themselves. They want to direct the abundant resources they have in their life towards the things they care about most. They want their own lives to have purpose and meaning and they want to uncover and discover their own passions, hopes, and dreams. Some may already be doing this from within their faith tradition and that is wonderful. They probably love the way that makes them feel and they want to experience that feeling more often. They will step up when asked.

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For others whose spiritual practices are more private, they are likely longing for a public way to express their own desire to be a part of the solution, part of a community’s response to the problems facing it. Your role with these folks is to take a powerful stand with your own life. Remember that who you are and how you live your life speaks more loudly than the words you say. Make your life an intense example. I want you to let yourself feel the love you have in your heart for every young person whose life is changed by your program; and I want you to demand of yourself every action that you can take to help your prospective donors experience that same love.

I promise you that when you bring your authentic self into those asking moments, you will always elevate the quality of the relationship. You may still hear your prospect say no, but they will have changed. You will have brought them closer to their passion and that is powerful. That is your mission in action. That is you building a community of committed, passionate, concerned individuals who want the world to be better. If they don’t ultimately invest in your work, they will find the right and perfect place to share their abundance. Your role in this powerful result will be rewarded.

One of the best ways to excite someone’s passion is through the art and practice of storytelling. In the Getting Started section below, I’ll help you think about the stories that capture the essence of your organization’s powerful work. You’ll learn to tap into your own authenticity and use your passion to move prospective donors into powerful relationships with your program.

Paradigm Shift Three: Embrace Sufficiency, Forget Scarcity and Suffering

Using leading government sources (the CIA Factbook, the World Bank, and the US Federal Reserve) for the most recent data available, we can estimate that in 2003 there was a worldwide money supply of approximately \$47 trillion with \$11 trillion of that total actually in the United States and much more controlled by US citizens in other parts of the world. It is worth noting that while US citizens control between 25-30% of the world’s gross domestic

product, we represent only 4.5%^{ix} of the world's population and only 6% of the world's land mass.

Given these numbers, you would think that we could easily see the potential in asking our friends and family, colleagues and fellow congregants, neighbors and new acquaintances to invest in our work. Yet for some reason, we let our fear that they may say no frighten us into never asking. Instead we suffer in the misery brought on by not having enough to do our critical, life-changing, mission-driven work. We tell ourselves that what doesn't kill us, will make us stronger. And we surround ourselves with others who will commiserate with us.

Enough!

One of my closest teachers and mentors, Lynne Twist, is an incredible fundraiser and a dear friend. She has taught me some amazing things over the past five years, some of which I'll be sharing here. Her work as founder and president of the Soul of Money Institute™ and the lessons in her book, *The Soul of Money*^x, have radically altered my ways of thinking about money and fundraising. In particular, she has convinced me that we do not actually live in the world, but rather in the conversations we have about the world. Think about this for a minute. Its radical in its simplicity. It suggests that how we talk (to ourselves and others) manifests control over our thoughts, emotions, reactions, and realities. If we believe things hard enough, they can become true for us.

In this context, I think Lynne's words about the myth of scarcity are very important to understand when it comes to fundraising, or passion-raising. She said:

"We don't just think things are scarce, we think from a condition of scarcity. It's not just that we believe there might not be enough, we actually have a mindset or a frame of reference that no matter what's happening there is not enough. Picture yourself going through a day. When you wake up in the morning, no matter what time you went to bed, and no matter what time you're waking up, the first thought almost everybody has is, 'I didn't get enough sleep.' And then the next thought you have is: 'I don't have enough time to get myself to work on time,' or 'There's not enough milk in the refrigerator,' or 'We don't have enough money to do the things we want,' or, if you're running a volunteer organization, 'There aren't enough volunteers,' or if you're running a profit-making organization, 'We don't have enough profits.' It's the frame of reference for life, particularly in the industrialized societies, but it's pretty much that way all over the planet. No matter who you talk to, you can get agreement on this, and you can get a whole conversation going about 'There isn't enough of this,' and 'I don't have enough of that.' It's a frame of reference for the way we live and think. And money is the great lightning rod for this scarcity notion^{xi}."

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ix According to 2000 United States Census data and 2005 world population reporting by the United Nations.

x This compelling text explores attitudes toward money—earning it, spending it, and giving it away—and offers surprising insight into our lives, our values and the essence of prosperity. On the web at: <http://www.soulofmoney.org/>.

xi Excerpted from a 1996 interview by Michael Toms for the New Dimensions World Broadcasting Network.

I believe that Lynne is right about the pervasiveness of the scarcity mentality as a way of life. When I'm talking to people about how to excite passion and attract new investors, I'm always met with concerns that are rooted in people's fears about not having _____ (fill in the blank with the following:).

- ★ Enough staff or time to talk to individuals;
- ★ Any rich people we can ask for money;
- ★ More people in the community who will help us;
- ★ The ability to compete with other organizations;
- ★ The money to print nice materials or go to training, or hire a consultant, or host an event, or . . .

You get the idea.

These are all probably true statements and they are all excuses based in the mentality of scarcity. Don't get me wrong. I have been in that moment where it feels like nothing will ever change, that we just need a break, a bit of good luck, a little more money. In the end, though, I got through that moment when I focused on doing better with what we already had. Refocusing people's time. Changing priorities. Giving people room to be creative.

What I have come to believe from my conversations with Lynne is that we need to re-orient ourselves from within a condition of sufficiency—a "place" or condition where we have enough and where enough is just the right amount to meet our needs. When what we have is sufficient, the suffering ends. We become whole people capable of moving the world with the gifts we have already been given.

She goes further, suggesting that "If you let go of trying to get more of what you don't really need, it frees up unbelievable amounts of energy to make a difference with what's right there in front of you—that which you already have. If you make a difference with what you have, you will see it expand. And I'm talking about love, I'm talking about time, I'm talking about 'related-ness'—I'm even talking about money."

So your job is to change the conversations you have with yourself and that you permit others to carry on around you. Help them to see the unbelievable bounty you already have. Later I'll give you activities to do with your team that will show them all of the people who are already connected to your organization and who already care about what you're doing.

Richard Bach, one of my favorite authors, writes in his book, *Illusions*, "Argue for your limitations, and sure enough, they're yours." Change your way of thinking. Believe that you have everything you need to start building a constituency of individual donors. Your passion will get you started and people will notice the change. We want to be around people who are hopeful, who have faith in change, who see that the glass has just the right amount—it's not empty, it's not full—it has in it just exactly what you need. You can do this.

Paradigm Shift Four: It's Not About Knowing Rich People

If I could choose to change just one misperception about raising money from individuals it would be the notion that not knowing people with wealth is a roadblock to being successful in your efforts. Wealthy people have money to give and you should ask them. That's easy. We agree.

What frustrates me about this conversation, however, is that most of that \$249 billion in annual charitable giving comes from middle-income, working-class, and poor people. This also happens to be most of the nation's population! Your universe of prospective donors is

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huge. There are almost 296 million people living in the United States and most of them have incomes like yours and mine.

Another person who has significantly impacted my thinking about individual giving is Kim Klein, publisher of the Grassroots Fundraising Journal^{xii} and author of several books including *Fundraising for Social Change*. Her journal is an amazing resource for your work. There are literally hundreds of free archived articles focusing on all kinds of fundraising topics at her website.

In 1997, Kim published an article titled “You Already Know All the People You Need to Know to Raise All the Money You Want to Raise.” Brilliant! This says it all. Stop your constant (scarcity mentality) fretting about not knowing rich people. You should focus on the people you already know. The people who care about you and your organization and the things that you care about. It is likely that your passions will connect. This will make your asking easier and more successful. It is also consistent with the statistics about who gives in the United States.

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According to research by the Gill Foundation, 80% of all charitable giving comes from households with annual incomes under \$50,000 and the nation’s poorest people give the highest percentage of their income. People just like you and me want to get involved. They want to use the resources they have in abundance to make a difference. They want to put their valuable time, talent, and treasure to work on the issues they care about. It’s our job to help them do it.

Paradigm Shift Five: You’re Not Asking for a Gift, You’re Giving One

By asking the people you know to invest in your work, you are actually helping them to give attention to problems they can’t take care of on their own. You are offering them a chance to put the resources they have in abundance in their life (time, treasure, or talent) to work on the issues they care about most. You are giving them a chance to work through you and your organization—to take a stand with their life by directing their resources to your organization’s critical work. I agree with Lynne Twist who believes that there are four key elements involved in successful fundraising conversations. Powerful contributions are made when:

- I. People are in touch with themselves, with their own vision and magnificence and with the difference they can make;
- II. People see that the work you are asking them to support really makes a difference;
- III. People see that their money makes a difference; and
- IV. Someone asks, giving them the opportunity to invest.

Your job is to ask. Their job is to decide.

I’ll focus more on this concept in the next section, but in the meantime, you can practice by asking yourself! What do you expect to hear when being asked to contribute to an organization? How does it make you feel? What are the factors that you consider?

In fact, go ahead and make a contribution to your organization that you feel good about. Then ask your friends for an investment in that same range. This stops you from wasting time worrying about the exact right amount to ask someone to give and it helps you prepare for your ask. If you know someone has more access to wealth, ask them for more. If they have less, ask them for less. Use your own giving as a benchmark.

xii On the web at: <http://www.grassrootsfundraising.org/index.html>

And if you still don't know how much to ask for, look at their forehead. I'll bet there will be a neon number flashing in front of your eyes. Trust your instincts!

A Special Note About Language

By now, you've noticed that I use the word investment, rather than gift, most of the time. This is intentional and you should do the same when talking with your prospective donors. You are not interested in charity. You don't want guilt money. You don't want to take money from people who you wouldn't want to go for a walk with in the park.

You want people to invest and to become involved. You want donors who share your values, your excitement, and your passion. You are entering into a sacred relationship with your donors. They are directing their abundance to you and placing their dreams for a better future in your hands. You are becoming partners. They are investing in your work. They are investing in you.

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Paradigm Shift Six: The Worst They Can Do Is Say No!

I think the thought of actually asking people for the things organizations need has probably created more anxiety than any other aspect of fundraising. Somehow we have gotten it into our heads that asking for what we need is rude or impolite or not dignified. I don't know where this started, but it has to stop.

Your organization is performing life-changing work. You are solving problems that are worthy of support. You deserve to have the resources to do more of this work and to do it better. Remember what I told you above? You are doing sacred work. It is OK to act like it.

If you agree with my premise above, that the worst they can do is say no, then you are ready to embrace some new ways of thinking about asking people for their time, talent, and especially their treasure. I want you to accept the following:

- I. It is your job to boldly ask. It is the prospective donor's job to decide yes or no. Ask and then be quiet. Listen. Answer their questions. Thank them genuinely regardless of their answer.
- II. You will not define your success by the number of people who say yes and give, but rather by the number of people who say no!
- III. You will not avoid asking your friends and family; and you will contribute first.
- IV. You will not be afraid to ask people for what your organization needs; and you will always ask for a little more than makes you comfortable.*
- V. Whenever you are asking someone to invest, you will speak only 25% of the time and really listen during the rest of the conversation.
- VI. Your belief in your organization will always exceed your fear of asking.
- VII. You will always remember that if you don't have the time to express your gratitude, you don't have the time to have real people as donors.

* How do you know how much to ask for is the question I get most often; and there is no right answer. My best advice is to do your homework, trust your instincts, and watch for the neon sign on their forehead!

These rules are simple and straight-forward. If you follow them, you will be successful in raising people's passions and raising huge amounts of money. It may not happen overnight, but you'll be surprised at how quickly you can transform your giving program using these strategies.

Last year, my organization found itself struggling to replace the funds from a foundation grant that was promised, but did come through. We are fortunate to have a few major donors who really support our work. One of these donors made his usual \$45,000 gift in January (I said we are blessed!). This grant crisis occurred in mid-February and it was my job to go back to him and make an emergency appeal. We drafted a great letter and I scheduled a phone appointment and because we had a strong relationship, he agreed to my request for a \$50,000 challenge grant. I offered this “challenge grant” approach knowing from my relationship with him that it might make a difference. It did and we agreed that we would raise \$100,000 from other donors first.

He gave us six months. Board members held house parties and mailed letters to people in their rolodexes, our staff asked friends and family members, I made daily donor calls. Everyone who gave got a special thank you. We put charts on the wall tracking our progress and I sent daily e-mail updates. Using the strategies I outlined above, we raised that \$100,000 in less than 60 days. This is not rocket science. The donor’s passion, the passion of our staff and board made all the difference. Everyone rallied and donors responded.

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Case Study: Kids Are Natural Passion-Raisers

My godson Kitu just turned sixteen years old. I remember changing his diapers. When he was about nine, I was at dinner with him and his folks just before his birthday. He wanted a new bike. A Schwinn ten-speed if my memory serves.

Now when you meet this kid, you feel like you are in the presence of a very old soul. His mom adopted him from an orphanage in South Africa where she was working for Mother Theresa. Kitu’s mom had died during childbirth and his father was not able to care for a newborn, so she was chosen in a tribal ceremony to become his mother. It was all quite beautiful. Growing up, Kitu has always been really shy, quiet, and easy-going with a gentle, sensitive, and caring spirit. I’ve never seen him throw a tantrum or pout. He doesn’t yell and he is very protective of his younger brothers and sisters.

I think of him as a little Gandhi bringing peace and calm into any room he enters. So you can imagine my surprise at dinner that night when I asked him what he wanted for his birthday and his eyes lit up and he started talking about that bike.

This is a kid who until that moment never asked for anything. It was generally like pulling teeth to get him to talk about presents he might want for Christmas or his birthday.

But there was something about that birthday and that bike that got him talking. In fact, it was like all the sudden I wasn’t even in the room. It was clear that I created the opening, but he saw this as his chance to persuade mom and dad that they should get him that bike.

I’m not sure I’ve ever seen an “ask” as effective as his was that night. He was fearless and in two minutes he had covered all the bases:

- ★ I’ve been really good.
- ★ I can ride my bike to the store for you.
- ★ You won’t have to drive me everywhere anymore.
- ★ I really need it.
- ★ My friends all have bikes and they’ve been letting me practice.
- ★ I’ll wear a helmet.
- ★ There’s one almost like the one I like best that is on sale. That would be OK.
- ★ The other kids can ride it when they get older (he has three siblings).
- ★ Riding a bike is good exercise. It will give me bigger bones.

I think it was that last comment about building bigger bones that alerted me to the fact that I was in the presence of genius! Here was this nine-year-old kid who had created an amazing “ask” by combining basic facts, simple logic, and genuine emotion. This was a brilliant pitch. His passion was overwhelming.

And yes, his parents got him that bike for his birthday.

Paradigm Shift Seven: The Power of Gratitude

If there is anything I have learned from raising money over these many years, it is about the awesome power present in simple acts of gratitude: Taking someone’s hand and looking them in the eye while you thank them for their investment; A hand-written thank you note; A phone call for no other reason than letting someone know how important they are to your organization.

You would be surprised at how these simple acts can transform your organization’s constituency of donors. I promise that more than anything else you can do, learning how to thank people will make the most profound difference in your efforts.

Melody Beattle said that "Gratitude unlocks the fullness of life. It turns what we have into enough, and more. It turns denial into acceptance, chaos to order, confusion to clarity. It can turn a meal into a feast, a house into a home, a stranger into a friend. Gratitude makes sense of our past, brings peace for today, and creates a vision for tomorrow."

Case Study: NYAC Thank-a-Thon

The end-of-the-year holidays are a great time to ask people to invest resources in your organization. Most people are starting to wind down a bit at work and generally seem a little more receptive to thinking about others. Some will be experiencing the “joys of the season” and others will just be grateful the year is over!

If you’ve invested the time in cultivating your individual donors and prospects, the end of the year holidays (it is also the end of the tax year) can be an appropriate time to ask people to invest in your organization’s important work. You’ll want to plan ahead as you aren’t the only one who hopes to benefit from the holiday spirit.

There are countless ways to do an end-of-the-year appeal and it really just depends on the resources available to you. As has become a consistent theme for me here, I would recommend a simple approach. We used this two-step method (based on an idea from Terry Axlerod and Raising More Money™—more about Terry and her work follows below) in my own organization, the National Youth Advocacy Coalition (NYAC) this past year and it was a phenomenal success.

This is the e-mail I sent to our staff explaining step one of the concept and defining the parameters of the activity:

To: All Staff and Board
From: Development Team
Re: Holiday Thank-a-Thon

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I know Thanksgiving is here and we're all very busy, but let's remember what this season is all about! We've had a tough year like so many, but we're still here and our work is better than it has ever been! Fortunately, we have had a lot of people in our corner helping us.

Most of us remember when someone tells us "Thanks" and really means it, and as the holiday season begins, what could be better than expressing our gratitude to the people who make our work possible. NYAC has had hundreds of donors this past year, and we are going to call them all.

YES! All of them—just to say THANKS!

Holiday cards are great (and our biggest supporters will be getting those and hand-written notes, too), but a personal phone call makes an impression, it leaves a warm feeling behind.

So our development team is pulling together the list and we have scheduled next _____ for NYAC's First Annual Thank-a-Thon!! We'll start at 11am, break for a potluck lunch at 12:30pm, and then finish the calls between 2-5pm! Board members will be making calls from their homes in the evening that same week.

We want everyone to be excited and well organized. It is important that we all tap into our own holiday spirit and bring our most positive energy that day! Everyone will be participating. We'll all be making calls from our desks and leaving messages will be fine. We don't expect to reach everyone in person.

What are you telling the donor with this call?

- ★ We noticed you invested in NYAC.
- ★ It means a great deal to us.
- ★ We appreciate you very much.

The actual script looks like this:

"Hi, may I please speak to _____? My name is _____.

I'm a member of the staff/board of NYAC—the National Youth Advocacy Coalition. I'm just calling to say thank you for your wonderful support this year and in the past. It has been a really tough 2004, especially lately, but your involvement has helped us to stay in the fight!

This year we've grown. We've been able to offer terrific new resources and technical assistance to youth organizations all around the country; and we've made a real difference in the lives of thousands of LGBTQ young people. Your support helped to make that possible. Don't hesitate to be in touch with us if you have any questions or ideas. You can find us on the web at _____ or please give our development director a call at _____. Thank You and Happy Holidays!"

You'll need to stick to the secular "Happy Holidays" as we don't know who believes what, but you can feel free to personalize the thank you as much as you would like.

If you actually reach a real person, they may chat a bit. You should be prepared with a few general facts, but don't think you need to take a crash course before you're qualified to get on the phone. You can always refer specific questions to someone else for a call back. If someone has a complaint or wants to make a gift right now, _____ will handle those calls right away—just buzz them with the quick details and they will pick-up the call.

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That's it. Simple, right? I promise that this will be a day that all of us will remember. Gratitude is a blessing that it is shared by everyone who experiences it. And remember:

"To educate yourself for the feeling of gratitude means to take nothing for granted, but to always seek out and value the kind that will stand behind the action. Nothing that is done for you is a matter of course. Everything originates in a will for the good, which is directed at you. Train yourself never to put off the word or action for the expression of gratitude."

~ Albert Schweitzer ~

"Gratitude is something of which none of us can give too much. For on the smiles, the thanks we give, our little gestures of appreciation, our neighbors build their philosophy of life."

~ A. J. Cronin ~

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When the day came, we met as a team for a few minutes in the morning (over Krispy Kreme doughnuts) to pass out lists, answer any questions, and really get people excited about what they were about to do. By lunchtime, I could tell it was a huge success. Staff members were telling stories about their conversations and talking about how great it was just to tell people thanks. I think I underestimated the positive impact this event would have on staff and board members' morale.

We also heard from all kinds of people about how impressed they were with this simple event. We received lots of feedback like this e-mail message:

"Dear Craig, A quick note to say thank you for the phone message you left last week and for the holiday card. I've been around the not-for-profit world a long time and your call and card are acts of generosity not often seen."

This particular donor asked to meet in person and a month later made a \$1,500 investment in our organization—six times what he had ever done before! Now, I can't promise results like this one every time, but I can tell you that more people had positive things to say about this year-end appeal than ever before.

Step two of this strategy consisted of our regular year-end newsletter mailing one week later and the end-of-the-year direct mail appeal just days after that. The entire approach worked beautifully.

SELF-ASSESSMENT & GETTING STARTED

Confucius said that "A journey of a thousand miles begins with a single step." The same is true when it comes to building a powerful constituency of committed and passionate individual donors. If you're still reading, my guess is that you probably have what it takes to be successful in raising money from real live people just like you and me.

You're also beginning to understand that my intention is not to give you a step-by-step plan, but rather to change your way of thinking. The system is important, but it is secondary to embracing the philosophy of passion-raising I've put forward. I want you to live outside the box, let go of old ways of thinking about money and fundraising. Shake it up and get out there and do it!

Do Your Homework

1. As you get started, begin by pulling together a small group of stakeholders who share your interest and passion for developing a constituency of individual donors. This small

group will act as a kind of development team, so be sure it includes staff and board members. This group can also include donors, volunteers, and young people. It really is up to you, though I would start with a smaller team that can always expand.

2. Review your organization's annual budget.
3. Familiarize yourself with the organization's revenues and expenses.
4. Know how much you get from individual donors versus corporations and foundations.
5. If you don't have a copy of your organization's development plan, ask for one.
6. If your organization doesn't have a development plan, you will need to create it. This is essentially your roadmap for generating the revenue your program needs to survive and thrive. If this is your first development plan, I would recommend you spend some time on this step before moving on. Having said that, don't get hung up on creating the perfect plan. This is an internal document that you can use to help refine your strategy. A simple spreadsheet broken down by funding stream, each with a monetary goal and a list of prospects, is really all you need to get started.

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If you want to go the extra mile, a development plan is most useful when it is a detailed outline of how the individuals in your organization are going to raise the money necessary to support the work of your organization during a specific period of time, usually one year.

It should help you keep your passion-raising on track by forcing you to:

- ★ Set realistic revenue goals in your budget;
- ★ Create clear expectations for staff and board about their roles and responsibilities;
- ★ Monitor, assess, and revise your revenue projections throughout the year; and
- ★ Help you devise appropriate campaigns for reaching your goals.

7. Review (or develop) a one-page external case statement to assist you in approaching donors. The case statement is essentially your organization's mission, vision, and values in writing. It should be passionate and powerful.

You want this statement, which is often the only thing prospective donors will read, to spark their imaginations by showing them exactly how their involvement and their investment will make a real difference. When she trains fundraisers, Lynne Twist suggests we motivate donors by asking them to stand with us in "The Gap"—the space between the amazing work your program is accomplishing right now and what would be possible with a specific, tangible investment by the donor. Your case statement will help define the gap, though it is never a substitute for real live conversations with your prospective donors.

Build Your Case Statement^{xiii}

To help you plan, these are the typical steps for creating a case statement, with the approximate time required for each:

Step One -- Research (minimum 2 weeks)

During this stage, we review everything that currently exists in print about the organization: annual reports, newsletters, articles, press releases, the Web site, etc. That's called "secondary" research. If the project requires more information, we might also during this stage conduct "primary" research as well. This typically consists of key informant interviews, focus groups, or even surveys.

xiii Adapted from materials developed by Ahern Communications, Inc. On the web at: http://aherncomm.com/fundraising/case_statements_external/index.htm.

Step Two -- Develop a Concept (minimum 1 week)

Based on what we learn during the research stage, we then develop a communications concept (or strategy). This concept includes the main selling message (the so-called "tent pole," the most powerful message we have, off which everything else hangs); the supporting messages; and a very rough draft of what the case statement will include, showing headlines.

Step Three -- Final Writing (minimum 2 weeks)

Once the concept is clear, begin the final writing, fleshing out the details. The concept gets refined repeatedly during this stage. Also at this point, you may want to involve a graphic designer, for planning purposes.

Step Four -- Graphic Design (depending on resources, minimum 1-3 weeks)

Once the writing is fully approved, the graphic designer can start her/his real work: making the piece entertaining, easy to read, visually gratifying, and dramatic.

Step Five -- Printing (depending on resources, minimum 1-3 weeks)

The graphic designer oversees this step of process, exercising quality control. Your final case statement should clearly communicate the essence of your organization's life-changing work. Take some time with this piece. It can be a very valuable tool.

8. Once this work is complete, the next step is to assess your prospects—both organizationally and individually. I suggest the two activities below to help you begin to see the universe of prospects you already know and are in relationship with right now.

Map Your Prospects

One of the best ways to begin preparing your organization to embrace individual giving as a integral part of your fund development activities is to help your team recognize all of the people and organizations that already care about your work.

Many organizations believe that they aren't connected to enough people to make individual giving a viable strategy for raising money. A simple activity that you can lead will not only show this belief to be false, but it will also provide some important information as to how to structure your efforts.

People have been using "webbing" or web maps as learning tools for decades. Webs are visual maps that show how different categories of information relate to one another. They provide structure for ideas and facts and provide a flexible framework for organizing and prioritizing information.

It is important to credit another of the most amazing fundraisers I've ever known, Terry Axlerod, for adapting web maps for use in fundraising. Terry is the founder and CEO of Raising More Money™^{xiv}, an internationally-acclaimed speaker and author, a personal friend, and one of my mentors. Much of what I have learned about raising money

^{xiv} Raising More Money™ trains and coaches non-profit organizations to implement a mission-based system for raising sustainable funding from individuals. On the web at: <http://www.raisingmoremoney.com/>.

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from individuals over the past ten years or so is rooted in my relationship with Terry and it is her “Treasure Map™” activity that started it all for me.

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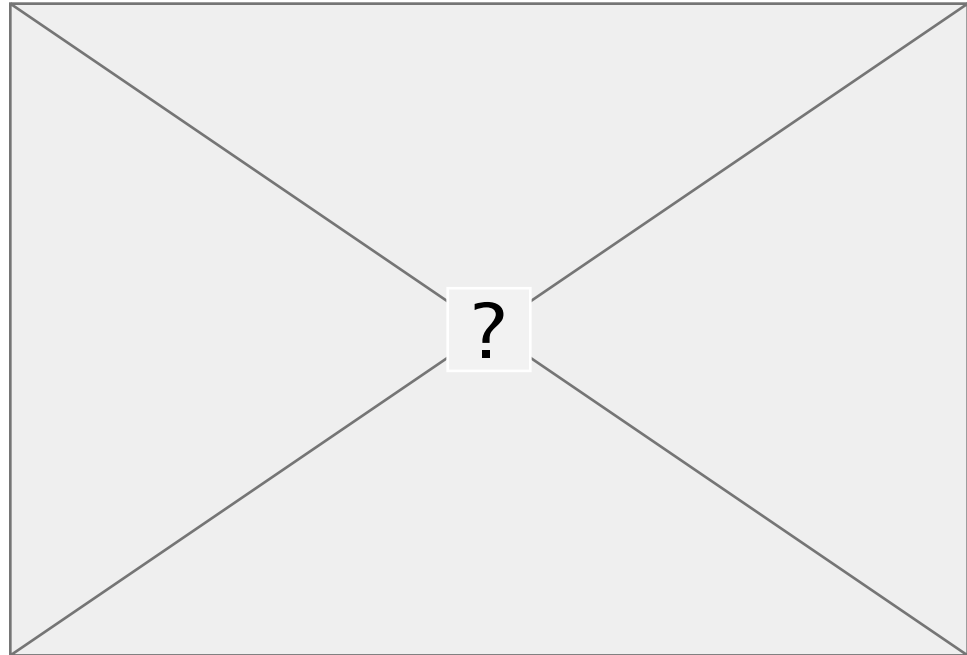
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Treasure Map (Chart 4)

For this activity, you will place your organization at the center of the web. Links from the center will connect your key stakeholders and core constituencies as well as track details about their connections to you.

Begin by convening a small group of the people responsible for raising money for your organization. It would be terrific if you could include your executive director, all of your development staff (even if that is just one person), perhaps a couple of key board members, senior program staff, and anyone else who brings passion and energy to your organization's mission work. Don't get too hung up on who is in the room. There is no right or wrong formula and you can always repeat the activity with more people as your donor work progresses.

I've already shown you the statistics related to charitable giving in the United States and I would suggest that you share that information as preamble to this small group activity. The statistics are powerful and they begin to help lay the groundwork for some of the key concepts I have been discussing in more detail here.

Once folks are ready:

- I. Draw a circle in the middle of a large piece of newsprint taped to a wall so all can see. In that circle, write the name of your program.
- II. Next, ask your participants to shout out the names of organizations and groups of individuals that have a connection to your program. Don't limit yourselves. Think of this as a kind brainstorming and don't censor anyone's ideas.
- III. Now, spend a few minutes listing all of the resources that each group has in abundance (i.e. knowledge, experience, access, space, ideas, MONEY!).

- IV. The next step for your group is to spend some time discussing the self-interest (See “A Special Note About Self-Interest” Below) of the people and groups you have identified. Why are they connected to your program? What’s in it for them?

At this point, your small group should be getting excited! You have a tremendous amount of information about a lot of people who are already connected to your program. These are your potential donors. You already know all the people you need to launch and sustain your individual giving program and you know how and why they are connected to you. This is all you need. The only thing left to do is start asking!

But before you do, spend a few minutes in your group talking about what you learned from the activity. Let group members process the experience so as to reinforce the key points of the exercise. If you have enough time, you may even want individuals to do their own personal prospect map. Terry Axlerod suggests that we each do our own map every three-four months. It helps us to stay connected to our existing prospects and it helps us to identify new ones more quickly. I follow her advice.

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A Special Note About Self-Interest

The idea that human beings act from a place of self-interest is not new. For centuries it has been the dominant view in psychology. If you subscribe to this notion, you believe that everything we do—from the compassionate to the remarkable—we do ultimately for our own advantage or fulfillment. In some instances, the personal benefits are clear to everyone involved; in other cases, they are known only to the individual experiencing them.

Thomas Hobbes, the seventeenth century philosopher, believed that human beings always and only acted from self-interest. I’m not sure that I believe self-interest is the only motivating force in a person’s decision to invest or get involved in our programs.

I like to believe that human beings are also capable of acting from a place of concern for others that is not derived from how it will impact their own welfare. Indeed, contemporary psychologists are beginning to have research data that suggests humans are also capable of acting from a place of empathy. I’ll be very happy if this is proven to be true. In the meantime, self-interest is certainly a powerful force worthy of your attention and consideration.

Reflect on Your Own Giving

Whether your team members do a personal prospect map or not, it is important that each member individually take stock of their own relationships, identify potential prospects from their list, develop an asking strategy, and then go forth and ask! Not only will this generate new revenues, it will also help you address the anxiety around asking. These are people they know and who know them—friendly faces.

One way of doing this step is to have each person get a blank sheet of paper and turn it horizontally. On the sheet, have your team members draw vertical lines to create seven columns. Make columns one and five a little wider. Allowing two-three minutes for each step (a little longer for steps one and five), tell them to do the following (one step at a time):

- I. In column one, write down the names of the first 25 people who come to your mind—friends, family, colleagues, politicians, bankers, teachers, clergy. Don’t censor yourself. This will begin to create a list of donor prospects, but don’t put someone on the list, or leave them off, because of what you know about their ability to give or your concerns about asking.

- II. In column two, put a checkmark next to the names of people you know and who know you. Circle the checkmarks for the ten “strongest” relationships. You decide what strongest means.
- III. In column three, put a checkmark next to the names of people that you personally know give of their time, talent, and treasure (to any organization).
- IV. In column four, put a checkmark next to the names of people you think would be interested in the work of your organization.
- V. In column five, next to any name you checked in the last step, write down what you think is that person’s self-interest for getting involved or investing in your organization. Be really candid here. This person won’t be seeing your list!
- VI. In column six, I want you to set a financial goal for what you could ask this person to invest in your organization. If you had to do it, knowing what you now know, how much could you ask them for? Take a deep breath. Write it down.
- VII. Finally, look at the amounts you just wrote down. If you wrote down an amount \$200 or less in column six, triple it and write it down in column seven. If the amount is greater than \$200, double it and write that down in column seven.

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Now spend a few minutes asking people to process this activity. What did they learn. What were the surprises or the “Aha!” moments for them. How did it feel to put target amounts next to people’s names. How did it feel when you told them to aim higher?

After a few minutes, give your team members the following homework. Have them look at those checkmarks they circled in column two. These are the people they need to ask very soon. At least three asks within the next week. Some prospects may need more cultivation. That’s fine. But all of us have at least three people who are ripe and ready right now.

9. You’re almost there! The next step is to plan for those asking moments you’re about to have! Now as much experience as I have asking people for money, I cannot tell you how it will go exactly. I can tell you a few things that will be helpful, however. You should also re-read the sections related to asking above (Paradigm Shifts Five and Six) as you prepare.

As I see it, there are six things that all prospective donors will want to know before they decide whether to invest in your work or not. These questions are relevant whether you are asking in person, over the phone, in a letter, or at an event:

- ★ Who are you? How are you connected to the organization? Why are you here?
- ★ What does your organization do? What is the mission and vision? What are the organization’s values? What is its history?
- ★ What is your organizational story? Why would a donor care? How does your organization’s work connect to what the prospect cares about—what they are passionate about?
- ★ What is the gap? What amazing work are you doing now? What else could you do if this donor invested time, talent, or treasure?
- ★ What specifically are you asking this donor to invest? Do you know what you want? Have you done your homework? Do you see the the right amount flashing on their forehead?

When it comes to deciding how much to ask for from a prospective investor, let me tell you one more story. Early in my fundraising career, I was at lunch with a prospect. We both knew I would be asking for money and we were both prepared. When the time came (I knew this because my heart started beating through my chest), I gathered my composure and asked him for \$5,000. This was more than he had done previously, but I was really confident he could do it.

After I asked, I sat back proud of myself, remained quiet as you should do, and I waited for his answer. Two seconds later he said “Sure!” and then he added “What a relief . . . I thought you were going to ask me for \$10,000.” I smiled awkwardly. “I would have given you \$10,000,” he said. “If you had asked for it.”

“Can we start over?” I said hopefully. “Next time,” he said.

You had better believe that I have never left money on the table since that moment. The worst thing they can do is say no, remember? Your job is to ask, their job is to decide. It is OK for you to make their decision difficult, not impossible, just difficult.

- ★ What will the donor receive for their investment? Are you offering recognition? Have you imagined how you will thank them for their generosity? How will the organization express its gratitude?

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Now preparing answers for most of this will be fairly easy. It requires work, but if you have taken the steps I've outlined, much of it is already done. But one piece requires a little more effort. This is the piece that allows the life-changing work of your agency to shine through with all of the emotion and passion you experience in doing the work.

This is where you tell a story. Most of our organizations already have them. They are the stories that we tell over and over again. The ones that still bring tears to our eyes. They have become mythical. We don't even know sometimes if they are true, but they have awesome power to move people to action.

Write a Two-Minute Speech

I want you to come up with a new story. A story from where you sit within your program. I don't mean you had to necessarily experience it first-hand, but you need to have been close to it and it needs to have touched you, personally. What have you experienced in your program that chokes you up, that makes you mad or hopeful, what is it that brings you to work everyday with an unstoppable desire to do more for the young people you serve. This is the story you should tell. This is the one that will cause your prospective donors to stand in the gap with you, investing and involving themselves in the amazing, life-changing work of your organization.

There is no real formula for the activity of developing the story—your two-minute speech. I suggest you find an hour or two where you can sit alone without interruption. Get yourself into a space where you can be reflective. Light a candle. Play some music. Think about why you do what you do. Try to remember why you got involved in the first place. Think about those moments when the work is unbearably difficult—when you might be thinking about changing jobs—what keeps you there? What motivates you to tough it out?

Is there a person that comes to mind? A young person who said thanks one day? A kid whose life was a mess when they first came to your program and now they are succeeding in ways unimaginable? Is it a mentor that pops into your head? Is there a volunteer whose life has been changed? Make a few notes. Draw a picture. Let yourself feel the emotion you want to cultivate in the person you'll be asking.

When the story becomes clear (and it will), write it down and practice telling it. First, practice in front of the mirror. Then in front of a colleague or two, maybe a young person, practice in front of your significant other.

Ask them for their feedback. You want this story to be powerful. It needs to be brief—two minutes at most! And you want to tell the story in a way that will move even you every time

you tell it. It can't be phony. I don't want you to pretend to cry. This isn't about making people feel guilty or sorry the kids you're working to help. This is the real deal—heartfelt emotion turned into passionate commitment. You don't need to fake it. When it's real, you'll know it, and the people listening to you will know it, too.

That's it! There is probably more I could tell you, but this is ENOUGH for now! You are sufficiently prepared to start cultivating a constituency of passionate and committed individual investors. Jump in with both feet. Take some risks. Ask for help when you need it—people, especially donors, love to offer advice.

And start asking for money. Don't wait until the system is perfect—it will never be perfect. And don't let your fear about hearing no stop you from asking for what you need. Get excited when you hear no. Jump up and down. Set a "No Goal" and put a chart on the wall to track your progress! Then get out there and ask again. And again. Ask until your program has all it needs to survive and thrive!

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