

# United Way Perth-Huron NFP Workshop October 19, 2022



## Formation

Mentoring Leaders in the Not-for-Profit Sector

# Building a Case for Support

## ▶ Outcome:

- ▶ Draft a best practice, donor-focused, two-page Case for Support

## ▶ Learning Goals:

- ▶ How do you step outside of your own head?
- ▶ How do you speak in a new language to your donors?



# V Formation - Team Bios

## ▶ Neil Hannam, MA, CEO

- ▶ Neil Hannam has over 25 years' experience in the not-for-profit sector. Before Neil started V Formation, he spent the previous 12 years in healthcare fundraising and was the Executive Director of two Hospital Foundations. Neil also served on the senior management team of both hospitals.
- ▶ Neil and the V Formation team have been leading many fundraising feasibility studies and capital campaigns for numerous non-profits and charities across Ontario and nationally. In addition, the team has also planned and executed annual programs including direct mail, digital advertising and special events, as well as assisting clients with strategic planning and vision/mission development.
- ▶ Neil completed a Master's degree in 2013. His thesis focused on organization transformation. Committed to voluntarism, Neil has been a program and leadership volunteer with various organizations for the past 25 years.



# V Formation - Team Bios

- ▶ **Karen L. Ormerod, MM, Principal Consultant**
- ▶ Karen Ormerod has been working in the not-for-profit and charitable sector for over 40 years. Described as a visionary leader and organizational change agent, she earned a Master's of Management Degree for National Voluntary Sector Leaders from McGill University in 2003 and her Certified Fund Raising Executive (CFRE) designation in 2015.
- ▶ Karen has held leadership roles in a variety of local, provincial and national charities. In these positions, she led fundraising efforts that raised millions of dollars in revenue and is considered an expert in raising funds through direct mail, events, major gifts, planned giving, and annual programs.
- ▶ In addition, Karen played a key role in helping to create and launch Ontario Tech University's *Not-for-Profit Leadership Certificate Program* since 2013 and continues teaching the Strategy & Leadership and People Management modules.



# Six things you love - but your donors don't care about....

## 1) Your Charity's Financial Efficiency

- ▶ Surprising? While many donors say they care about this, few are actually motivated by it. Focus on the action donors make possible by giving and on the values you share with donors. Financial efficiency is low on the list.

## 2) Your Charity's Amazingness

- ▶ Be amazing. But don't expect donors to give because of qualities they never think about and likely don't understand. They want to make something good happen. Focus on that.



# Six things you love - but your donors don't care about....

## 3) Your Charity's Accounting Figures

- ▶ Financial transparency is important. It's just not that important to donors. Knowing your financials are available is motivating for some donors. Actually seeing them is important to almost no one.

## 4) Complexity

- ▶ Real life is complicated. Your organization is on top of it. Good for you. But piling the complexity onto donors will suppress donations. Every time. It's not just that it's uninteresting -- it actively discourages giving. Keep your focus on the outcome donors help make possible.



# Six things you love - but your donors don't care about....

## 5) Desperation

- ▶ Sometimes we face desperate situations. Even then, few donors are excited about saving your organization. But they are very interested in making sure the good work you do keeps going!

## 6) Your Charity's Heroic Administrator or Founder

- ▶ Maybe your leader or founder was a real hero, an inspiration. Not so much to donors. When you want someone to donate, you have to put the burden of heroism on *them* -- not someone else.



# What can we learn from cats about fundraising?





# What can we learn from cats about fundraising?

- ▶ My cat and I are great friends. We love hanging out together.
- ▶ But our relationship is built on delusions:
  - ▶ *My cat thinks I'm a cat.*



# What can we learn from cats about fundraising?

- ▶ The other delusion: *I think my cat is a human.*



# What can we learn from cats about fundraising?

- ▶ I interpret her cat behavior toward me as her being cuddly and nice. She thinks the things I do (especially the part where I put out food for her) as correct cat behavior.



- ▶ Besides the occasional misunderstanding about walking on me while I sleep or trips to the vet, the whole thing works.



# But delusions like that *don't* work in fundraising.

- ▶ In fundraising, you need to be completely clear about the difference between yourself and your donors.
- ▶ If you think your donors are what you are -- that is, experts in your cause who spend all their time thinking about it and working on it -- you will never quite connect. Everything you say will be wrong, irrelevant, even disturbing. As if you kept presenting gifts of twitching, half-dead mice.



# Don't treat your donors like you treat your cat!

- ▶ Treat your donors as what they really are:
  - ▶ Concerned non-experts who are paying less attention to you than you are.
- ▶ The responsibility is yours in this relationship.
- ▶ But staying out of the delusion is how you'll build the right relationship with your donors.



# Listen to Neuroscience



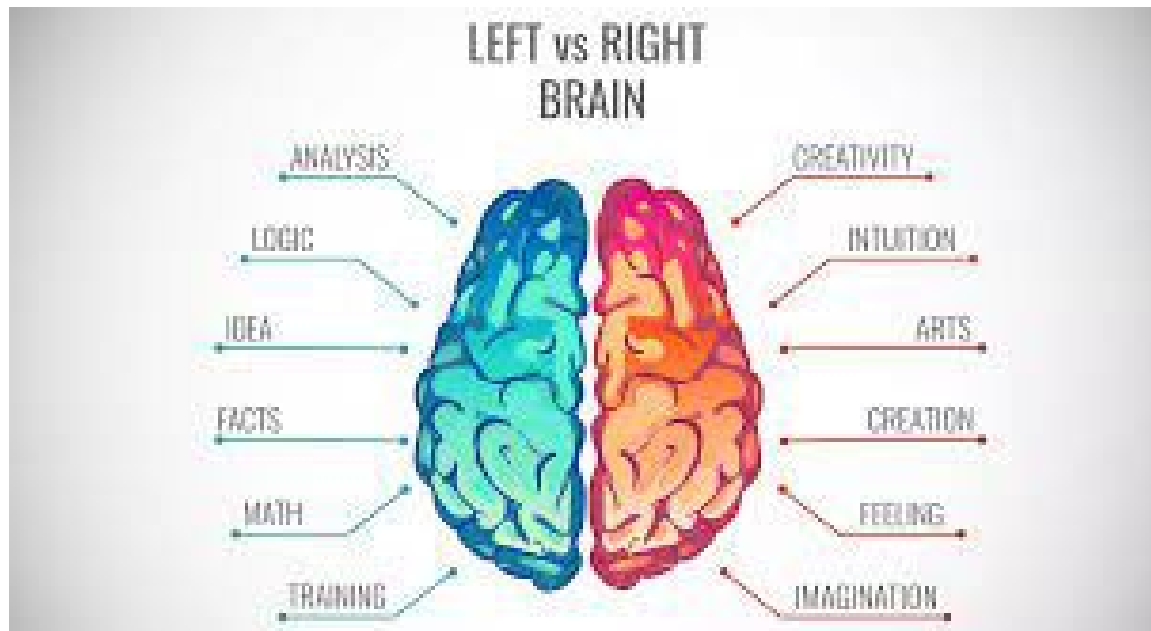
# Listen to Neuroscience

- ▶ Probably the biggest barrier to creating effective fundraising is that you have to get outside your own mind.
- ▶ The part that really trips up the most people is the way aging changes the human brain.
- ▶ As we age, we become more right-brained. More emotional. More story and belief driven.
- ▶ The majority of professionals in fundraising are well under that age. More dependent on their rational, numbers-driven left brains.



# Listen to Neuroscience

- ▶ That's what the Good Works Blog notes at [How Aging Changes The Way We Read Mail:](#)





# Listen to Neuroscience

- ▶ ... there is a cognitive gap between you and your donor. Your donor is more right-brained than you. And this means that you have to craft copy that uses rich stories, sensory images, and metaphors to speak to that right-brained bias. What works for your donors, won't work for you. That's something we all need to remember when we're writing, proofing, and approving copy.
- ▶ When you learn to make that leap from what you think would work based on your own mind to what you know would work based on knowledge of donors ...
- ▶ That's when you start to succeed as a fundraiser.



# Mind the gap!

- ▶ Can you see the gap between you and your donors?
- ▶ It's a gap of knowledge, understanding, and sophistication about your cause.
- ▶ You have a lot of those things. (I hope you do, anyway!)
- ▶ Your donors, not as much.
- ▶ You're an expert.
- ▶ They are not experts.



# But....

- ▶ But they care, and they want to donate. They don't need to become experts like you in order to care enough to give.
- ▶ It's up to you to cross the gap.
- ▶ When you understand this truth, fundraising starts to go very much better.



# Mind the gap!

- ▶ That's the important and encouraging point of this post at the Better Fundraising Blog: [The Gap and The Gift](#).
- ▶ Crossing the gap means:
  - ▶ You use language they understand, not your professional jargon.
  - ▶ You don't load up your fundraising with complex "how it works" material ... you focus on "what your gift will do."
  - ▶ You focus on specifics, not abstractions.
  - ▶ You talk about things that motivate donors -- not what motivates you. (And this means you put effort into discovering what motivates donors.)



# 16 things your donors wish you'd do...

- ▶ What do you donors want? Here's a list from Marketsmart, [16 simple things your best donors want:](#)
  - 1) They want you to do the important work they can't or won't do.
  - 2) They want you to give them the credit and praise for your achievements. They want to be the hero in the story, not you.
  - 3) They want you to remind them how great they are frequently.
  - 4) They want you to take an interest in them and their story.
  - 5) They want service and respect when they reach out to you.



# 16 things your donors wish you'd do...

- 6) They want empathy.
- 7) They want you to tell them what you did with their money.
- 8) They want you to be transparent about how you accomplished your objectives.
- 9) They want you to be fair, honest and trustworthy.
- 10) They want opportunities to give you feedback with two-way communications.
- 11) They want you to provide value to both them and the people (or objectives) their donations support.



# 16 things your donors wish you'd do...

- 12) They want you to deliver real results, make an impact, or foster change.
- 13) They want you to offer them opportunities to engage and immerse themselves in your mission so they can feel more involved.
- 14) They want those engagement opportunities to be convenient for them.
- 15) They want to be able to invite their friends and family to participate.
- 16) They want you to make it easy!



# The Syrian Boy....





# The Syrian Boy....

- ▶ The facts that prove a crisis is a problem that urgently needs response never stir response.
- ▶ But the picture does.
- ▶ Because that's how our brains work.



# The Syrian Boy....

- ▶ A recent column in the New York Times, [To Make the World Better, Think Small](#), makes this same point about talking to would-be donors:
- ▶ Think small. In the fund-raising business, there's an old axiom that "one is greater than one million." This isn't bad math; it is a reminder that when it comes to people in need, one million is a statistic, while one is a human story.
- ▶ Except too many charities aren't worth their salt. They don't help donors "think small" by presenting solvable, human-sized problems.



# The Syrian Boy....

- ▶ And so even more people died and went un-helped. And too many would-be donors stayed stuck in the sad illusion that they can't do anything to make the world a better place -- because charities refuse to think small.
- ▶ If you want to raise funds, you have to enter the psychological world of your donors. **You have to think small -- which is the ultimate form of thinking big!**



# Listen to Dolly Parton

What is her Donation Strategy?

*“I just give from my heart.”*



*“I never know what I’m going to do or why I’m gonna do it. I just see a need and if I can fill it, then I will.”*



# Listen to Dolly Parton

## What is her Donation Strategy?

- ▶ One need Ms. Parton does focus on filling is fostering a love of reading in children. Her Imagination Library initiative sends a free book every month to children under five whose parents request them. Currently, Ms. Parton sends out about 2 million free books each month.
- ▶ “This actually started because my father could not read and write and I saw how crippling that could be,” she said. “My dad was a very smart man. And I often wondered what he could have done had he been able to read and write. So that is the inspiration.”



# Listen to Dolly Parton

Her thoughts on why giving is so important

*“... when you help somebody, it helps them, but it can help you more.”*

*“That’s what we should do as human beings,” she said. “I never quite understood why we have to let religion and politics and things like that stand in the way of just being good human beings. I think it’s important from that standpoint just to feel like you’re doing your part, doing something decent and good and right.”*



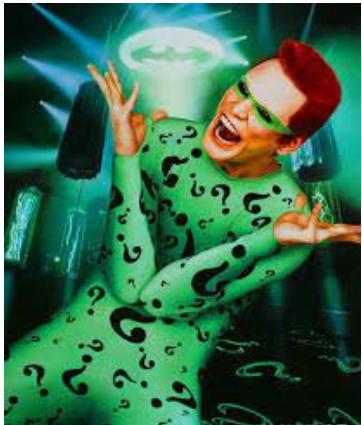
# Six common errors that kill your fundraising story...

- 1) **Your story is not emotional.** A "story" that isn't emotional isn't a story. It's a list. The entire purpose of telling a story in fundraising is to connect your cause with your donors' hearts. Because 95% of your donors will not donate until you've won over their hearts. Make your story about suffering, struggle, loss ... then show the donor how they can enter the story and help create a happy ending.





# Six common errors that kill your fundraising story...



- 2) Your story has the wrong hero. The hero of an effective fundraising story is *not your organization*. Or your amazing staff. Or visionary founder. Any or all of them may be heroic, no question. But the hero of the story you tell to win over donors must be the *donor*. And they are more *potential heroes*. You are placing before them an opportunity to do something great. It's up to them to do it.



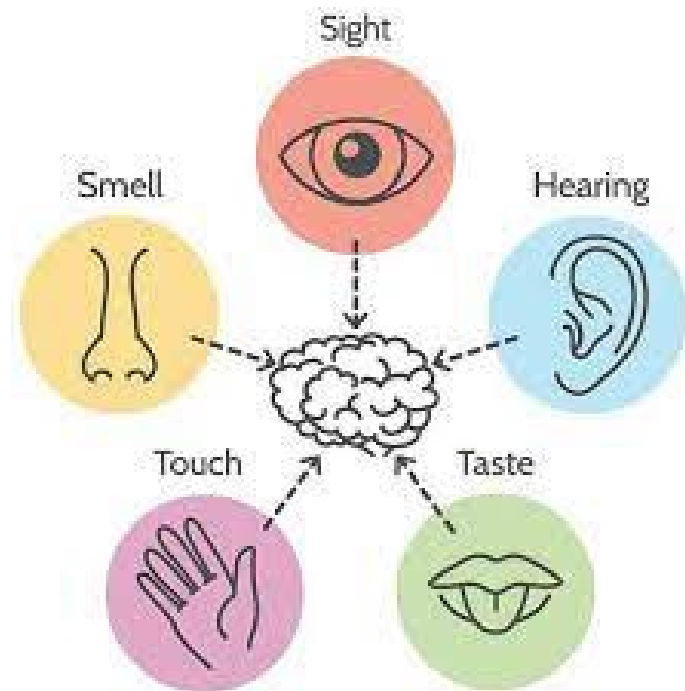


# Six common errors that kill your fundraising story...

- 3) **Your story is about programs, not people.** Your programs are important. They must be well-designed and brilliantly implemented. But donors don't give because you have great programs. They give because they want to make a difference for fellow human beings. Make sure that's the story you tell!



# Six common errors that kill your fundraising story...



- 4) **Your story is not detailed enough.** The way to make a story come to life is to focus on details. Especially those telling sensory details that put the reader into the scene. Think about the five senses, and include as many as you can. That turns a story from an account into a living reality for your donors.



# Six common errors that kill your fundraising story...

- 5) **Your story is too detailed.** While you're thinking about adding details, also think about the details that don't make the story more vivid. You aren't practicing journalism, working to include all The *who-what-where-when-why*. If a detail doesn't make the story more human, interesting, and emotional -- leave it out.



# Six common errors that kill your fundraising story...



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- 6) **Your story has a happy ending.** Most of the stories we gather for fundraising have happy endings. We know about them because something went right! But a happy ending lets the reader off the hook. They see that things are good, and they are not needed! Leave the happy ending off the story. Save it for your newsletter and thank you letters -- so you can show donors their giving made a difference.



# Why do so many fundraising appeals fail?

- ▶ It comes from one (or more) of these sources:
- ▶ **Fear** that if they don't come across as erudite or sophisticated, their donors will lose respect for them.
- ▶ **Pride** (even arrogance) in their knowledge and education.
- ▶ **Obliviousness** that not everyone (in fact, hardly anyone) sees the world as they see it.



# Why do so many fundraising appeals fail?

- ▶ Here's what it looks like when writers approach fundraising like that:
- ▶ Donor support will ensure patients and their families have the resources and support systems in place to maintain optimal mental health, including creating wellness centers, providing personalized navigation assistance, expanding treatments and services and a reimagined outpatient environment that develops innovative solutions for community-wide mental health issues.



# Why do so many fundraising appeals fail?

- ▶ It needs to be "smarted up."
- ▶ It needs to be made more readable, with several shorter sentences that have one idea each.
- ▶ It needs to be about concrete things, not abstractions.
- ▶ It needs to use the language of the reader, not the jargon of the writer.
- ▶ It needs to address the reader in a direct way -- not just make an observation about "donor support."
- ▶ It needs *heart*.



# Why do so many fundraising appeals fail?

- ▶ Few donors will notice, because few will make it beyond the third word of a passage like this. Those who get through will have no idea what it's about, much less what they should do about it.
- ▶ Next time you're told not to "dumb down" your writing, take a moment to see what you can do to "smart it up." You'll see the result in your fundraising revenue almost immediately.





# The voice of the boss...

- ▶ **The worst thing I've ever been told by a non-profit client:**
- ▶ *Our president has a very strong and unique voice. It's critical that all materials you write for us adhere to that voice.*
- ▶ Every time I've heard this, the result has been the same: The boss' unique writing voice doesn't adjust to effective fundraising writing. In fact, it pretty much outlaws it.
- ▶ The unique voices of boss after boss are surprisingly similar to each other: formal, complex, hard to read, self-focused, padded out with abstractions.



# The voice of the boss...

- ▶ Expert writers understand that *voice adjusts to its audience*.
- ▶ The very purpose of "voice" is to *accomplish a goal*.
- ▶ If you find yourself struggling with a "my unique voice" boss, you have my sympathy. If the boss is a reasonable and insightful person, you may be able to have a fruitful discussion about the issue. You can use the many books and blog posts about effective fundraising writing to make the point.
- ▶ Some bosses will listen to you. Some won't.



# The writing secret that can double your fundraising success...

- ▶ **Easier to read, more likely to raise money.**
- ▶ It's pretty simple, but you might not know that to read a lot of fundraising these days. It mimics that turgid style of academic writing, with long, complex sentences and always-choose-the-longer-word vocabulary.
- ▶ Some fundraisers apparently think that makes them look smart or sophisticated.
- ▶ It actually makes them look worried about their organization's future. Because writing that way steeply lowers response.



# The writing secret that can double your fundraising success...

- ▶ A recent test, reported in [We Don't Write So Good](#), a free ebook from NextAfter and DonorVoice (available for download, registration required) found the following disturbing, though unsurprising result:
- ▶ ... *by lowering the reading level of the message from 10th-grade down to a 6th-grade reading level, we observed a 90.8% increase in revenue....*
- ▶ For many people, the only place they've had formal training in writing has been at school. And school teaches academic style: complicated, erudite, formal. Appropriate in the closed world of academia (maybe), but bristling with barriers to engagement and comprehension in the real world, where nobody is being paid (or forced) to read your stuff.



# The writing secret that can double your fundraising success...

- ▶ Write for reading ease.
- ▶ When you write like an academic, you actively exclude most of your donors, including those with advanced degrees.
- ▶ And they'll respond by paying less attention, which means they'll give less often. Or never.



hello **sixth**  
GRADE



# What does this look like in reality?

**Kawartha Land Trust**



# What does this look like in reality?

## ▶ Land Trust Version One

- ▶ Your gift can help care for natural areas such as the Fleetwood Creek Watershed. It's the last remaining watershed in the Southeastern portion of the Kawarthas to receive an "A" score for water quality. The connected landscape is home to rare ecosystems, landforms, and at-risk species.
- ▶ Or the Falls property, home to rich bird and plant life, sustained by the cliffs, streams, upland forests, and wetlands in the 'Land Between' - the transition zone between the limestone bedrock of southern Ontario and the granite Canadian Shield.



# What does this look like in reality?

- ▶ **Land Trust Version One (continued)**
- ▶ It only takes one day to bulldoze through the land you love. One day to undo the miracles of the Land Between, forged by time immemorial. One day could create a loss of land mourned for generations to come.
- ▶ Your help will allow KLT to work with property owners to find mutually beneficial ways to protect the land you love. Whether they donate a part of their land for the trail or put a conservation easement on their land title, there are many ways to protect these natural areas.
- ▶ There's going to be a boom in the Kawarthas. Today, you can make sure it's a conservation boom.





# What does this look like in reality?

- ▶ Land Trust Version Two
- ▶ Can Kawartha Land Trust (KLT) have a worldwide impact? That depends on (insert foundation name). With your support, Kawartha Land Trust can take the most ambitious and important climate action the Kawarthas has ever seen. In fact, top climate scientists in Canada have identified Peterborough and the Kawarthas as a key battleground in the fight against climate change.
- ▶ It's why KLT was recently awarded an impressive \$1.7 million government grant, designed to help KLT with the important work of *carbon sequestration* – specifically, ensuring that more land is protected from development so that sequestered carbon will not be released back into the atmosphere and further contribute to the current climate crisis.



# What does this look like in reality?

- ▶ Land Trust Version Two (continued)
- ▶ Using cutting-edge imaging technology from the International Space Station, KLT will identify areas in the region that can store the most carbon, such as critical woodlands and wetlands. Healthy landscapes and ecosystems absorb and store immense amounts of carbon from the atmosphere. They keep the air we breathe, the water we drink and the food we eat safe and clean. And they protect communities from extreme storms, droughts, and flooding.
- ▶ Protecting the lands and waters of the Kawarthas—the treaty territory of the Williams Treaties First Nations—is an important defence against climate disaster, and **it's a matter of survival**. Climate change is accelerating at a rapid pace. It is the single greatest threat to our personal survival, property, and prosperity.



What does this look like in reality?



**STATION  
GALLERY**



# What does this look like in reality?

## ▶ Art Gallery

▶ Now more than ever, you need art.

▶ It was art, after all, that saw you — all of us — through the pandemic. Whether it was the art found in film, television, books, or music, art was our salvation during the uncertainty and isolation of unrelenting COVID lockdowns.

▶ Now, we can safely meet again. You and your loved ones can gather and witness a work of art together. Finally, you can share the communal experience of being in the presence of art with others.

▶ The lessons we can learn from the wonders and tragedies of art are priceless. This is especially true in times of turmoil.



# What does this look like in reality?

- ▶ **Art Gallery (continued)**
- ▶ Today, it's impossible to ignore the escalating tensions between nations, political parties and different cultural groups. Instead of finding common ground it seems that issues of class, race, gender and environmentalism are becoming ever more polarized.
- ▶ **Station Gallery has a role to play in giving your community perspective – to help the public re-establish common ground and learn to build bridges rather than breed division.**



# What does this look like in reality?

## ▶ Art Gallery (continued)

- ▶ In the face of hatred and ignorance, knowledge and understanding are often the best weapons. This is what Station Gallery has the power to showcase. But we can't do it without your help! I know you believe in the power of art. That's why I'm reaching out to you today. **Will the (Foundation Name) make a gift of \$5,000 to Station Gallery today?**
- ▶ Station Gallery was able to put words into action when it quickly pivoted to create and produce a recent exhibition. Entitled **HOLD FAST | Тримай Стрій**, this exhibition ran through April, and featured the work of eight Canadian-Ukrainian artists.



# What does this look like in reality?

## SHILOH HOUSE



# What does this look like in reality?

- ▶ Transition House
- ▶ Community gifts built an amazing 6-bedroom transitional housing unit called Shiloh House. What a perfect name for the house that donors built! *Shiloh*, Hebrew for “*peaceful one*,” refers to *rest, sanctuary and peace in the midst of pain*.
- ▶ The house that our community built stood in the background as six men proudly posed for a group photo in front of their new home. That photo will hang in the living room, forever commemorating this truly historic moment. These men were the first tenants to move into the newly opened Transition House.





# What does this look like in reality?

- ▶ **Transition House (continued)**
- ▶ Shiloh House is run by Grace Inn Shelter. When people experiencing homelessness need immediate help through Grace Inn's Emergency Shelter, there is food, a warm bed and a starting point to make positive life changes.
- ▶ But what about the people who do change their lives for the better—what happens when a person uses the available systems of supports, goes back to school or gets a job—what happens to the people who, despite these changes, still can't find permanent housing?



# What does this look like in reality?

- ▶ Transition House (continued)
- ▶ **Shiloh House bridges the gap between homelessness and permanent housing** by giving residents a chance to accelerate the efforts they have already made towards self-improvement. The residents are making homelessness a part of their past.
- ▶ **Shiloh House** wasn't supposed to open until it was fully finished and outfitted with commercial-grade furnishings and fixtures, because we knew that the House would be used by residents non-stop for many years to come, and better quality items that can endure constant use would be necessary.



# What does this look like in reality?

- ▶ Transition House (continued)
- ▶ However, **the demand to open was pressing** - and because construction and renovation costs dramatically increased due to the pandemic, we had insufficient funds remaining to cover the cost of the furnishings and fixtures. So we had to come up with a short-term solution while we worked on a longer-term plan.
- ▶ It was decided to put out a call for donated furnishings and fixtures - and our wonderful community responded immediately - we were given some very well-loved items that allowed the doors to open in March 2022. While not fancy or new, those items will do the job for the short-term and residents are happily on the road to permanent housing.



# What does this look like in reality?

- ▶ **Transition House (continued)**
- ▶ <Foundation> can you help retrofit Shiloh House with the commercial-grade furnishings and fixtures originally specified, with a gift of \$XXX? The cost of the furnishings and fixtures is \$XXX



Let us know if we can help you!



# Formation

Mentoring Leaders in the Not-for-Profit Sector

**Vformation.ca**

**[hannamneil1@gmail.com](mailto:hannamneil1@gmail.com)**

**705-761-0087**

