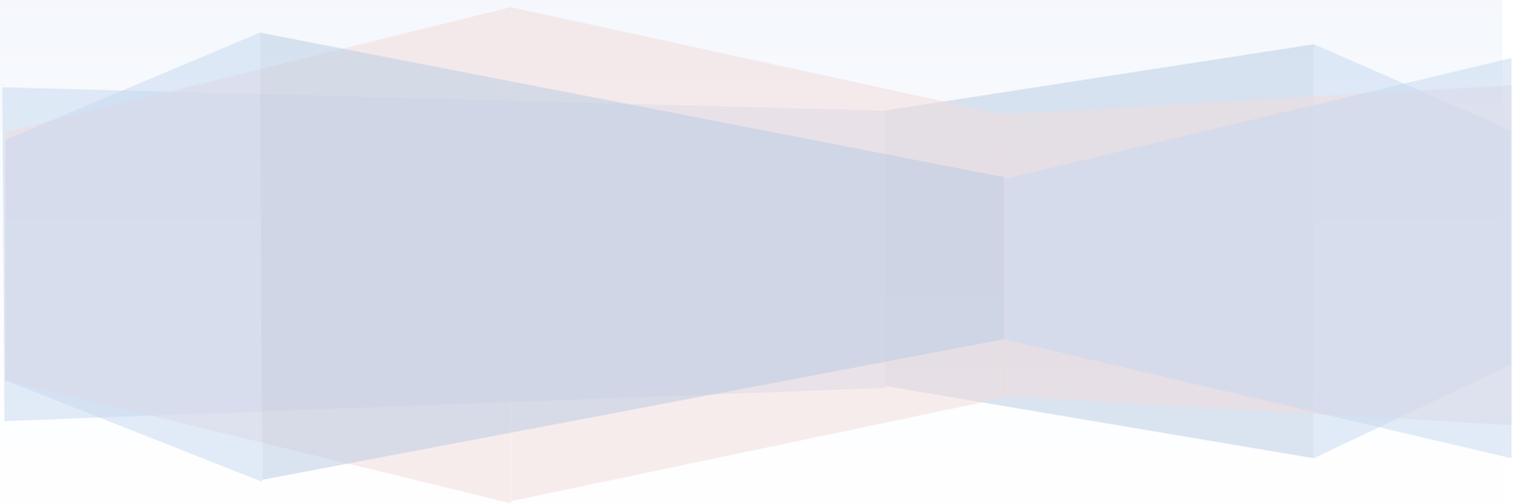


# Individual Donor Plan for San José Public Library's Partners in Reading Program

September 30, 2012



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## Introduction

The purpose of this document is to lay the foundation for a successful individual donor plan that will assist Partners in Reading (PAR) in developing a renewable, sustainable revenue stream to support the ongoing needs of the program. Partners in Reading is the adult and family literacy program of the San José Public Library. Statistics show that nearly 90% of philanthropic dollars are being contributed by individuals and bequests, and while individuals can be more of a challenge to reach and solicit, they are by far the largest philanthropic resource. This plan provides a roadmap for finding and cultivating individual donors, and how to solicit and retain those donors over time. In addition, it is also hoped that the key elements of this plan can be shared with other California library adult literacy programs that may wish to implement a similar project based on their needs and available resources.

## Partners in Reading Mission Statement

The mission of PAR is to enrich the lives of adults through reading, writing, technology, life skills, critical thinking, as well as English language learning; equipping them to achieve their goals and participate more fully and with greater confidence in all areas of their lives.

## Guiding Principles for Individual Donor Development

In the cultivation, solicitation and retention of individual donors, PAR will strive to maintain the following:

- PAR will respect personal and professional relationships in cultivating individual donors
- PAR will focus on building relationships with individuals who are passionate about literacy and the myriad benefits it offers to the community
- PAR will focus on building relationships with individual donors that are sustainable over time, and will balance relationship building activities with asking for contributions

The Donor Bill of Rights and Donor Centric Pledge have been developed by fundraising professionals, and outline best practices for working with donors. The primary purpose of these documents is to help guide the process of creating and maintaining good donor relationships. These are internal documents that help staff and volunteers understand the rights and roles of donors, and how the process of being donor centric helps cultivate relationships with donors that last. (See Appendix for both documents.)

## What Success Will Look Like for Partners in Reading

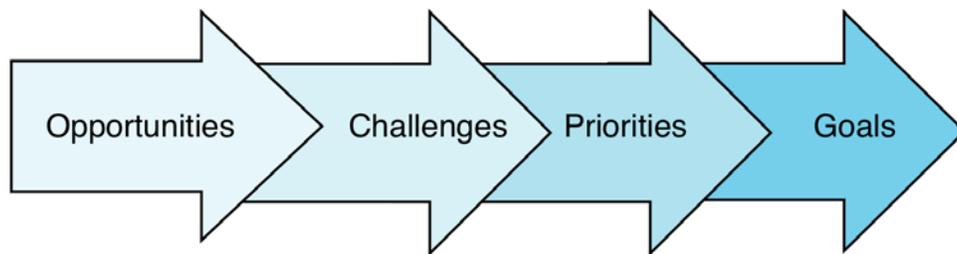
Implementation of an individual donor plan produces the following benefits when done well:

- Donor-centered fund development plan
- Stronger and deeper donor relationships

- More volunteers to help nurture relationships and solicit contributions
- Use of volunteers to help solicit contributions, and volunteers feeling greater connection to PAR as a result
- Growing understanding of what works and why, and what doesn't work and why as it relates to PAR's fund development goals
- Meaningful criteria to measure fund development success
- Specific relationship-building and solicitation strategies that specific volunteers have agreed to implement
- More loyal donors and more contributions

## Current Situation/PAR's Capacity for Individual Fundraising

PAR has had some success over the years in securing individual donors, but in order to expand and grow a larger individual donor base, there are internal opportunities and challenges that need to be addressed. Creating an individual donor plan is not merely a listing of solicitation strategies; it *must* take into account the larger organizational structure that exists, with all of its opportunities, challenges, priorities and goals.



### Opportunities for PAR

- A committed staff who are passionate about literacy
- A committed volunteer base, some of whom are already individual donors
- A strong program with measurable results
- An increasing need for the services that PAR provides
- Many success stories and clients served over the years
- The ability to share the successes of implementing this individual donor plan with other California libraries

### Challenges for PAR

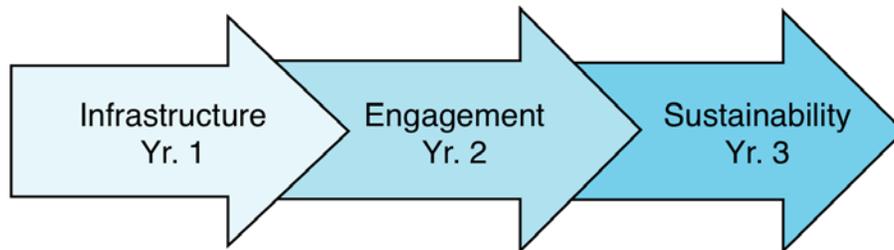
- A scarcity of fund development staff resources that can solely focus on the identification, cultivation, and stewardship of donors over time
- Internal apprehension about fundraising and what it entails
- The absence of a traditional non-profit board, which would help guide the organization's strategic direction and be critical partners in fundraising
- A non-formalized relationship between PAR and the San Jose Public Library Foundation (the fiscal agent through which donations are funneled), which impacts

the ability to control the donor data and the donor giving experience (for example, most non-profits are able to brand donor landing pages to enhance the donor experience and therefore increase retention rates)

### PAR's Capacity Building Priorities to Successfully Implement the Individual Donor Plan

- Determine and address PAR's infrastructure needs in order to successfully implement this plan particularly in the areas of:
  - Donor management (tracking, recognizing, informing, etc.)
  - Cultivation (managing the activities related to building relationships with potential donors such as information mailings and events)
  - Solicitation (mailings, volunteer recruitment and training, face-to-face campaigns)
- Work with its non-profit partner to enhance the flow of donor information and collection to aid in strategic conversations and decision-making. Clearly delineate how donors are tracked and recognized.
- Increase staff and volunteer understanding of and involvement in fund development planning and implementation
- Identify potential PAR Fundraising Committee members

### Annual Goals



#### Year 1: Create an Infrastructure for Success

Based on PAR's internal staffing capacity, decisions will need to be made about how much can be accomplished in Year 1. Focus efforts on putting the infrastructure in place during the first half of year; begin cultivation and solicitation in second half of the year. Begin using the Timetable/Calendar, in the Appendix, to plan your activities. Primary activities for the year include:

- Compile your current donor records and analyze
- Determine the budget you have for fundraising
- Create a vibrant and engaged PAR Fundraising Committee to oversee and guide the implementation of the Individual Donor Plan. Recruit and train Committee and begin identifying people in the community predisposed to donating to PAR. (See "Generating New Donor Prospect Lists" in the Appendix to begin generating outreach lists.)
- Set your Fundraising Goals: To raise \$XXXX from individuals, including \$XXXX from

current donors, \$XXXX from Fundraising Committee<sup>1</sup> outreach and solicitation and personal donations, and \$XXXX from other new donors. Set conservative goals based on a moderate uplift of previous individual donor levels (no more than 10%).

- Set your Outreach Goals: The number of new people you want to reach about PAR even if they do not donate this year.
- Select the strategies you will use to build relationships with potential donors, communicate with current donors, and solicit or renew donors. Set a dollar goal for each solicitation strategy.
- Create communication tools (case statement, fact sheet, remit envelope, online presence, etc.).
- Create a Donor Recognition / Loyalty Program and implement.
- Communicate with current donors (thank, survey, e-newsletters, personal touches) before asking for a new contribution.
- Recruit and train Volunteer Solicitors
- Begin cultivation activities such as cultivation gatherings to re-engage past donors in PAR's work and introduce the program to potential donors (Note: this is a relationship-building activity, not an ask.).
- Implement your selected solicitation strategies for past, current, and potential donors.
- Implement donor record keeping and tracking system.
- Recognize volunteer achievements.
- Evaluate the campaign.

## **Year 2: Engagement**

- Analyze Year 1. What worked and what did not? Assess internal capacity. Implement needed changes.
- Analyze and understand your donor base and use to help set goals.
- Set fundraising and outreach goals based on year one accomplishments, select the strategies you will use, set goals for each strategy and implement.
- Recruit and train any needed Fundraising Committee members or volunteer solicitors.
- Implement strategies to increase current donor engagement through loyalty program and ongoing contacts (goal of 4-6 times/year).
- Continue to identify community members predisposed to PAR; cultivate and solicit.
- Plan and kickoff a fundraising campaign (Year 1: Stories by Adult Learners Campaign, described in more detail on page 10.).
- Recognize Volunteers
- Evaluate

## **Year 3: Building on Success: Maintenance and Planning for Future Growth**

- Analyze year 2; evaluate capacity including any needed volunteers or additional training needs, make needed changes.
- Analyze and understand your donor base and use to help set goals. At this point, year

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<sup>1</sup> For a definition of the PAR Fundraising Committee, go to "Role of the PAR Fundraising Committee" in the Appendix.

- over year donor data will help staff better understand trends in donor activity.
- Set fundraising and outreach goals, select the strategies you will use, set goals for each strategy and implement.
  - Continue the cultivation, solicitation, and recognition activities.
  - Maintain donor contact (goal of 4-6 times/year).
  - Use PAR Fundraising Committee to help survey trends in the larger fundraising arena, as well as local economic trends and opportunities.
  - Expand Stories by Adult Learners Fundraising Campaign with the addition of a larger fundraising event.
  - Recognize volunteers.
  - Evaluate.

## Relationship Building Strategies

Relationship building is at the core of PAR's Individual Donor Plan. Relationship building nurtures donor loyalty, ensuring relationships that last.

**Decision Point:** PAR staff will need to review these Relationship Building Strategies and decide which strategies below will be used each year.

### Survey Existing Donors

A donor survey has been developed using Survey Monkey. This survey is asking about the historical experience donors have had with PAR, what motivated them to donate, if they plan to donate in the future, and what messages around adult literacy they find motivating. This survey can be a starting point for opening up a dialogue with donors. Some benefits of this include deeper engagement with PAR, creating interest in PAR's programming, and strengthening of support.

**Action item:** Send survey to existing donors.

### Thank Existing Donors

We know that donors need to be thanked, but part of taking this to the next level is developing a plan to thank donors with more impact. In addition, all current donors must be thanked again for past gifts before they are solicited for another gift. Remember: Research states it takes about 10 times more money to reach a new donor than to successfully communicate with a current donor.

**Action item:** Create an additional "thank you" postcard that can be personalized with a message from an adult learner that tells donors what the program has meant to them.

### Invite Donors and Prospects to Cultivation Gatherings

Cultivation gatherings are a way to engage donors and potential donors (prospects) in meaningful discussion around literacy and how they can get further involved. Cultivation gatherings are a great way to gauge the interest of prospects, and can be focused on specific interest areas. Guests such as past adult learners or local authors can be featured, and events can be held at your site or at other local venues. These gatherings will help give a new level of visibility to PAR, and they are also good for the community as a whole. While

cultivation gatherings are a relationship building strategy, some of these people will eventually become donors.<sup>2</sup>

**Action item:** Decide on potential topics and formats for cultivation gatherings.

### Connect with Donors and Donor Prospects

Find time outside of thanking donors for a donation and asking them for another donation to engage them. Inviting donors to events, sending donors timely articles or information, and keeping donors informed on how their contributions are being used go a long way toward building donor loyalty over time. This is also a means to educate prospects on PAR.

**Action item:** Decide what to send current donors and those you are trying to cultivate – perhaps the most recent adult learner book of writings or a timely article is emailed out.

### Hold Lunch & Learns at Local Companies

Outreach can be done to help more PAR Volunteer Tutors utilize company matching donations and as connections to secure internal “Lunch & Learns” at their companies to recruit more tutors and /or donors.

**Action item:** Send an email to current Volunteer Tutors asking if they would be willing to host a lunch & learn at their organization to spread the word about PAR.

### Social Media

Social media (Facebook, Twitter) should initially be used as a relationship building strategy through informational posts, invitations to events, and non-giving calls to action, and later used as a solicitation strategy for donor campaigns.

**Action item:** Begin building a larger fan base for PAR’s Facebook page, and using page for fundraising. See “Getting the Most Out of Facebook” in the Appendix).

## Solicitation Strategies

**Decision Point:** PAR staff will need to review these Solicitation Strategies each year and decide which strategies to use with which donors/prospects and set a dollar goal for each strategy.

### Face-to-Face Solicitation

Face-to-Face Solicitations are typically used to solicit donors making large gifts to the organization.

### PAR Fundraising Committee Outreach

Fundraising Committee members will be asked to conduct outreach and solicit at least five people in their networks predisposed to give to PAR at a level of \$500 or more. Committee members may also be asked to solicit identified donors and prospects who can also give at this level. The PAR Fundraising Committee will research additional prospects in the community and

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<sup>2</sup> For example, in its first few years, the Women’s Fund of Rhode Island (WFRI) hosted a dozen cultivation gatherings, introducing some 300 people to the organization. A significant portion of these people—but not all—became donors.

will periodically bring lists of names to meetings for the group to review.

### **PAR Fundraising Committee Contributions**

Fundraising Committee members will also be asked to make a philanthropic commitment to PAR. The commitment will be based on the Fundraising Committee member's self-determined giving capacity. See attachment, *Fundraising Committee Member Pledge Form*.

### **Outreach to Current Donors and Donor Prospects**

Outreach will be done to all current donors. *Note:* current donors will only be solicited after they have been 1) thanked again for their previous support of PAR, and/or 2) received a non-giving call to action at least once.

### **Personalized Mail Solicitations**

#### **Existing Donors**

Two personalized mail solicitations will be sent to donors and prospects during the year. The end of year appeal will be mailed in early November and the second appeal will be mailed in April. Each mailing will be themed based on a current literacy issue.

#### **“Stories by Adult Learners” Tribute Book**

To date, the annual “Stories by Adult Learners” has not been actively used as a fundraising vehicle. While some underwriting has been secured to defray printing costs, it has never been used toward achieving a financial goal. By attaching a fundraising goal of \$XXXX for each story in the book (approximately 35) this becomes a strong vehicle for fundraising over time.

Social media can also be used to promote the book. Adding short videos and testimonials of adult learners reading from the book, or talking about their experiences, makes for very compelling online content. In addition, this online promotion would help feed people back to PAR's website for additional information and the ability to donate.

#### **Adult Learner Book Solicitation Strategies**

**Volunteer Solicitors:** A Volunteer Solicitor team could be put together for this effort. Solicitation materials, such as tribute book samples and a Tribute Format Sheet, will be available for volunteers to use when making solicitation calls.

**Adult Learner Solicitors:** As self-selected ambassadors, adult learners may wish to tap their networks for support. (Note: while this may not be for every adult learner (especially those who wish to remain anonymous) there may be enthusiastic learners – both past and present – in PAR's network who wish to give back through this effort.)

#### **Updates to Current “Stories by Adult Learners” Book**

- Include an actual donation form within the content of the book (or a remit envelope inserted or bound into front cover)
- Include messaging about the need for individual support in the book's forward

## Book Release Event

Over time, the “Stories by Adult Learners” book has the capacity to not only raise money from individual donors, but to culminate in a strong fundraising event around the release of the book (an event that is already in place, and toward which considerable staff time is already spent).

## Email Solicitations

### Existing and Prospective Donors

Contributions can be solicited through email, particularly to donors who have indicated this as their preferred method of communication. Due to the lower cost of email, campaigns can be run quarterly. Email campaigns should also be featured on the PAR website with a direct link to a donation vehicle. Also, the e-newsletter should always include a link to the donation website.

### Obtaining More Email Addresses

Lack of donor email addresses can be an issue here. Consider adding an Opt-In Email Form to PAR’s website and Facebook page. Adding an Opt-In form will allow you to grow your email list of potential donors and volunteers. Most email tools, such as Vertical Response or Constant Contact, give you the option of adding an Opt-In form to your website. As an example, here's a link for how to use Vertical Response's Opt in form: [http://help.verticalresponse.com/how-to/tutorial/adding\\_an\\_opt-in\\_form\\_to\\_facebook/](http://help.verticalresponse.com/how-to/tutorial/adding_an_opt-in_form_to_facebook/)

## Social Media Solicitations

Facebook Causes can be used as an inexpensive, grass roots way to raise visibility and smaller pledges (See “Getting The Most out of Facebook” in the Appendix.)

## Retention Strategies

**Decision Point:** PAR staff will need to review these Retention Strategies and decide which strategies below will be used each year.

Research shows that donors feel satisfied when they know three things:

- 1) Your organization received the gift and was happy to get it
- 2) You put the gift to work in the way the donor intended
- 3) The program funded by the donor is producing the desired results

The good news is that by improving thanking and informing skills, donors can be better retained. According to Penelope Burk, 93% of people studied said they would “definitely or probably give again the next time they were asked to by a charity that thanked them promptly and in a personal way for their gift, and followed up later with a meaningful report on the program they had funded. Under these circumstances, 64% would give a larger gift, and 74% would continue to give indefinitely.”<sup>3</sup>

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<sup>3</sup> Burk, Penelope, *Donor-Centered Fundraising* (Chicago, Burk & Associates, 2003)

### Become Donor-Centric

- 1) Be loyal – follow the Donor Bill of Rights (see Appendix to view this document)
- 2) Make donors feel they are a part of the organization (tell stories about the role of donors; use messages that align with donor interests)
- 3) Be accountable to donors – be transparent to donors; tell them the truth about challenges and opportunities
- 4) Link donor engagement with organization’s results: make it clear that organization’s mission would not go forward and people’s lives will not change without their support

### Host a Donor Recognition Event

This is another way of saying thank you, and does not need to be a large expense. Invite a local author or expert in the literacy field to talk with donors. Local restaurants that support PAR can be asked to donate the food and service. Offer a cash bar with receipts going to the restaurant.

### Develop a Donor Recognition and Loyalty Program

Recognize donors by contribution size and provide benefits for various giving levels. Giving levels with names like Gold, Platinum, etc. have unfortunately been overused. Idea: using levels that are related to reading can be more fun and engaging, and for that reason, make more of an impact with donors. Suggested below is using the names of books for giving levels (customizable with any books; books titles below used as an example).

Giving Level Name	Amount	Donor Loyalty Items
Brave New World	\$0-\$49	PAR bookmark
Sense and Sensibility	\$50 - \$99	Stories by Adult Learners book
Great Expectations	\$100 - \$499	Personalized PAR items (mugs, shirts, etc.)
A Midsummer Night’s Dream	\$499 - \$999	Personal invitations to PAR events
All’s Well That Ends Well	\$1000 and \$9999	Personal invitations to special donor event
[Name Your Own Level – Favorite Book]	Gifts of \$10,000 and above	Part of PAR’s Founders Circle (name on permanent plaque)

## Communication

**Decision Point:** PAR staff will need to review these Communication Strategies and decide which strategies below will be used each year.

### Create a Donor “Welcome Packet”

Studies have shown higher donor retention and a higher percentage of second gifts when

donors receive a welcome packet from an organization. (Possible items to include: PAR bookmark, Stories by Adult Learners book, Donor Survey) Note: Don't overwhelm donors with materials; work to find a happy medium of materials distributed. Remember to ask donors what they want – some donors prefer to only be contacted via email, for example.

### **Best practice: Include a “Nongiving Call to Action”**

Make sure any PAR newsletters and regular correspondence (thank you letters) include a non-giving call to action as often as possible. Ideas: Enclose a quick-response card with one to three easy check-off questions. For example, ask what they think of the newsletter. Ask them to rate particular articles. Ask their reactions to your new cultivation ideas.

### **Acknowledge and recognize donors of money and time**

Make donor (and volunteer) thank-you calls. Thank donors for past gifts. And if they are receptive to your call, ask a few questions to help you get to know them better. For example, ask why they give. Ask how satisfied they were with their most recent contact with your organization.

### **New Communication Vehicles Needed**

New communications tools will need to be developed for relationship building activities, solicitation and ongoing retention of donors. This list, while not exhaustive, represents a standard baseline for PAR's ability to collection donations, thank and report accomplishments back to donors.

- PAR specific remit envelopes
- Thank you postcards to be personalized by adult learners (with perforated bookmark)
- Donor Newsletter (online or print)
- Annual Report (part of “accomplishment reporting” to show donors information about how their gift was used. Generally, a weakness in the sector.)
- PAR Fundraising Fact Sheets (can be created from Case Statement)

### **Additional Information**

For further information on corresponding communication tools and strategies, please see the companion piece entitled, “Messaging and Communication Strategies in Support of PAR's Individual Donor Plan.”

## **Role of Resources**

In the absence of a fund development professional, PAR staff, the PAR Fundraising Committee and volunteers will leverage the work of this individual donor plan. Another key consideration here is the overall fund development budget, which will impact the ability to implement the fund development strategies in this plan.

### **Role of the Staff**

- Ensure that the fundraising process is donor-centered.

- Train and support the volunteers.
- Be familiar with and understand best practices in fund development.
- Manage and coordinate all fund development activities.
- Develop and maintain donor recognition
- Develop progress reports; analyze trends and implications.
- Draft materials and provide resources for the fund development process.

### Role of the PAR Fundraising Committee

- Commit to and carry out specific activities in the individual development plan
- Assist in identifying and cultivating those predisposed to PAR's mission
- Nurture relationships with current donors and donor prospects, and solicit individual donors as appropriate
- Watch what is happening at PAR and in the community. Share their observations, ask questions, and help the organization make fund development plans.
- Make personal contribution at the start of each year's fund development program.

### Role of Solicitation Volunteers

Solicitation volunteers will be trained to help implement the various fundraising strategies laid out in this plan. Characteristics of strong solicitation volunteers include being friendly and outgoing, not being afraid of making a direct ask, and a strong commitment and knowledge of PAR's program. Solicitation Volunteers will:

- Give presentations about PAR to donor prospects
- Do face-to-face asks for PAR fundraising campaigns
- Develop lists of potential donors

A strong interest and knowledge of fundraising is helpful, but not entirely necessary, as volunteers will be given the appropriate tools and training for this work, including materials about PAR and training on the best ways to ask for gifts.

### Measurement

To set meaningful goals for individual donor participation, it is key to track a variety of information about donor participation and the outcomes of solicitation strategies.

### Donor Participation

1. **Renewal rate:** Donors who gave in previous years and gave again in the current year.
2. **Retention rate:** Donors who gave last year and again this year.
3. **Acquisition rate:** New donors acquired during the year.
4. **Attrition rate:** Donors whose last gift was in that year.
5. **Donor levels:** Number of donors at various giving levels.
6. **Increased donations:** Number of donors whose gifts increased from previous years.
7. **Totals:** number of donors each year.

**Development Activities**

It will be important to annually track the number of donors and the amount raised by each fundraising strategy. For instance, how many donors contributed through face-to-face solicitation and how much was raised through the strategy. You will want to compare this to your goals for each strategy.

## Appendix

The following pages contain all appendices for this document.

**Timetable/Calendar**

This plan covers the next three fiscal years. It outlines the general time frames for the major activities. Remember that this is a strategic individual donor plan, and does not include complete operational detail (the operational detail belongs to the staff). This calendar will be updated as activities are scheduled and modified over time, as necessary. Relationship and solicitation should alternate. PAR's goal is to cultivate donors before we solicit them for contributions.

<b>Time Frame</b>	<b>Preparation</b>		<b>Relationship Building</b>		<b>Solicitation</b>	
October						
November						
December						
<b>2013</b>						
January						
February						
March						
April						
May						
June						
July						
August						
September						
October						
November						
December						
<b>2015</b>						
January						
February						
March						
April						
May						

<b>Time Frame</b>	<b>Preparation</b>		<b>Relationship Building</b>		<b>Solicitation</b>	
June						
July						
August						
September						
October						
November						
December						
<b>2014</b>						
January						
February						
March						
April						
May						
June						
July						
August						
September						
October						
November						
December						

## Donor Bill of Rights<sup>4</sup>

The Donor Bill of Rights was created by top professionals in the fundraising field, and represents best practices in donor relationship management.

### *The Donor Bill of Rights*

Philanthropy is based on voluntary action for the common good. It is a tradition of giving and sharing that is primary to the quality of life. To ensure that philanthropy merits the respect and trust of the general public, and that donors and prospective donors can have full confidence in the nonprofit organizations and causes they are asked to support, PAR declares that all donors have these rights:

1. To be informed of the organization's mission, of the way the organization intends to use donated resources, and of its capacity to use donations effectively for their intended purposes.
2. To be informed of the identity of those serving on the organization's governing board, and to expect the board to exercise prudent judgment in its stewardship responsibilities.
3. To have access to the organization's most recent financial statements.
4. To be assured their gifts will be used for the purposes for which they were given.
5. To receive appropriate acknowledgement and recognition.
6. To be assured that information about their donation is handled with respect and with confidentiality to the extent provided by law.
7. To expect that all relationships with individuals representing organizations of interest to the donor will be professional in nature.
8. To be informed whether those seeking donations are volunteers, employees of the organization or hired solicitors.
9. To have the opportunity for their names to be deleted from mailing lists that an organization may intend to share.
10. To feel free to ask questions when making a donation and to receive prompt, truthful and forthright answers.

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<sup>4</sup> The Donor Bill of Rights was created by the Association of Fundraising Professionals (AFP), the Association for Healthcare Philanthropy (AHP), the Council for Advancement and Support of Education (CASE), and the Giving Institute: Leading Consultants to Non-Profits. It has been endorsed by numerous organizations.

## The Donor-Centric Pledge<sup>5</sup>

1. Donors are essential to the success of our mission.
2. Gifts are not “cash transactions.” Donors are not merely a bunch of interchangeable, easily replaceable credit cards, checkbooks and wallets.
3. No one “owes” us a gift just because our mission is worthy.
4. Any person who chooses to become our donor has enormous potential to assist the mission.
5. Having a program for developing a relationship with that donor is how organizations tap that enormous potential.
6. We waste that potential when donors are not promptly thanked.
7. “Lifetime value of a donor” is the best (though often overlooked) way to evaluate “return on investment” in fundraising.
8. Donors are more important than donations. Those who currently make small gifts are just as interesting to us as those who currently make large gifts.
9. Acquiring first-time donors is easy but keeping those donors is hard.
10. Many first-time gifts are no more than “impulse purchases” or “first dates.”
11. We’ll have to work harder for the second gift than we did for the first.
12. A prerequisite for above-average donor retention is a well-planned donor-centric communications program that begins with a welcome.
13. Donors want to have faith in us, and it’s our fault if they don’t.
14. Donors want to make a difference in the world—and our mission is one of many means to that end.
15. Donors are investors. They invest in doing good. They expect their investment to prosper, or they’ll invest somewhere else.
16. We earn the donor’s trust by reporting on our accomplishments and efficiency.
17. Individual donors respond to our appeals for personal reasons we can only guess at.
18. Asking a donor why she or he gave a first gift to us will likely lead to an amazingly revealing conversation.
19. Fundraising serves the donors’ emotional needs as much as it serves the organization’s financial needs.
20. We are in the “feel good” business. Donors feel good when they help make the world a better place.
21. A prime goal of fundraising communications is to satisfy basic human needs such as the donor’s need to feel important and worthwhile.
22. The donor’s perspective defines what is a “major” gift.<sup>6</sup>
23. Every first gift can open a door to an entirely new world for the donor, through participation in our cause.

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<sup>5</sup> From *Keep Your Donors: The Guide to Better Communications and Stronger Relationships*, by Tom Ahern and Simone Joyaux (John Wiley & Sons, 2008).

<sup>6</sup> A repeat donor of \$25 annual gifts who suddenly increases her gift tenfold to \$250, for instance, is making a major commitment that deserves special acknowledgment.

## Getting the Most Out of Social Media

### Maximize PAR's Facebook Page

The number of “likes” your page has does not always translate into user interaction. Even with a smaller amount of fans, if they are more proactive on your site they will be more useful than gaining a lot of fans who do not take notice of your posts:

- In addition to posting relevant things about PAR, keep track of what your fans are interested in and cater to their needs (helps make PAR's Facebook page a regular destination for them and truly contribute to PAR's overall online presence)
- Test a variety of content: photos, videos and questions are the most engaging kinds of Facebook posts
- Use Events in Facebook to track attendance and help spread the word about events
- Use Facebook “Causes” to launch a fundraising drive for PAR ([www.causes.com](http://www.causes.com)). This allows PAR supporters to create a drive for PAR and promote it directly to their networks. It can exponentially expand PAR's fan page through outreach done by those people who are already fans. How do you get them to start a cause for PAR? You create a post on your Facebook page with the link and you ask them ...

### Save Time

- To post to and monitor Twitter, Facebook, and LinkedIn at the same time, use Hootsuite or a similar tool for simultaneously posting, and the ability to analyze trends and data.

### Use a Blog

- A blog is a great way to become thought leaders in the space, share innovative ideas, highlight adult learners ... the list goes on here.

## PAR Fundraising Committee Pledge Form

### PAR Fundraising Committee Member Pledge

*In consideration of the ongoing operational needs of Partners in Reading, I pledge \$\_\_\_\_\_ during the 2012-2013 fiscal year.*

I designate my gift as follows:

**Annual Giving**                      \$\_\_\_\_\_ Unrestricted (where the need is greatest)

**Designated**                         \$\_\_\_\_\_ Stories by Adult Learners/Underwriting

\$\_\_\_\_\_ Other

**Total Pledge \$\_\_\_\_\_**

*I understand that payment for this pledge is due by [insert date]. I will fulfill my gift in the following way:*

Check included \$\_\_\_\_\_

Please make checks out to "San Jose Public Library Foundation"; in the "Memo" section, please write "PAR Donation."

Please charge my Visa/MasterCard \$ \_\_\_\_\_

Card number \_\_\_\_\_ Exp. \_\_\_\_\_

Signature \_\_\_\_\_

My company will match my gift.

Company Name \_\_\_\_\_

Phone \_\_\_\_\_

I would like my/our names listed as donors to PAR as follows:

\_\_\_\_\_

I/We to remain anonymous.

Date: \_\_\_\_\_ Signature: \_\_\_\_\_

Name (print): \_\_\_\_\_

## Fields Needed to Collect Donor Data

### Current Donor Fields Used in the Donor Database

Name  
Envelope Salutation  
Company  
Address  
City  
State  
Postal Code  
Date  
Received  
Fund  
Amount  
Branch Affiliation  
Approach  
Campaign  
Account Type  
Email  
Phone-Voice  
Notes  
Sort Name  
Recognition Preferences

### Suggested Additional Fields to Collect

- Volunteer Type: ability to segment donors as “Individuals” for tracking purposes
- Volunteer Tutor
- Company Matches Donations
- Program Participant/PAR Adult Learner
- Opt-out (do not mail, and/or do not email)
- Link a donor to a solicitor (ability to add a field to donor record, which helps link the solicitor to the donor)

Note: This list will change and be updated based on the need identified around donor management.

## How to Cultivate Individual Donors<sup>7</sup>

### **Step 1: Describe the general interests and qualities of those who are most likely to be predisposed to PAR's mission**

- *People who value education* (for example, educators, who see first-hand how a lack of literacy from parents impacts their children's future)
- *People who see literacy as a social justice issue* (those who support progressive organizations whose missions support resources for non-native speakers, and educational attainment for all segments of society)
- *People who love and revere language* (those who have achieved high levels of education, those who delight in reading and writing for the sake of writing, those who cannot imagine a world where people cannot read and write)

### **Step 2: Identify Where They Congregate and Affiliate**

Use the information collected from public lists (e.g. annual reports and newsletters) and identify people to invite to cultivation gatherings and PAR programs. Contact organizations whose missions link to PAR, and ask if you can make a presentation to their members and boards and staff regarding the mission of PAR. As an example: in its first few years, the Women's Fund of Rhode Island (WFRI) hosted a dozen cultivation gatherings, introducing some 300 people to the organization. A significant portion of these people—but not all—became donors.<sup>8</sup>

### **Step 3 and 4: Define Ways to Connect with Them. Then Connect with Them and Provide Vehicles for Them to Signal Their Interest**

Host cultivation gatherings, make presentations to other organizations letting them know about PAR's work and mission. Encourage those who attend cultivation gatherings to forward the email to those who they think might be interested, so these conversations help to identify the predisposed. Ask for several gifts a year on a different theme – give supporters a chance to support PAR by making it easy for them to do so.

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<sup>7</sup> These steps adapted for PAR from *Keep Your Donors: The Guide to Better Communications & Stronger Relationships* by Tom Ahern

<sup>8</sup> From *Strategic fund development: building profitable relationships that last* by Simone P. Joyaux.

## Generating New Donor Prospect Lists

### **New Donor Prospects**

Those who may be predisposed to PAR and its mission but are not yet donors. This segment includes:

- Current and former PAR participants (volunteers and learners)
- Those who have participated in committees or board service for the library in any capacity
- PAR Fundraising Committee contacts
- Those on the PAR mailing list
- SJPL donors
- SJPL volunteers (outside of PAR)
- Donors from organizations with similar missions to PAR (Reading Partners, Super Stars Literacy, etc.); prospect lists can be garnered from annual reports and public donor listings (Reminder: the building of these lists are not for direct solicitation; rather names can be gathered and distributed to PAR Fundraising Committee, staff and other SJPL leadership to determine if they know these contacts and think they may be interested in PAR)
- Families of PAR participants (both current and former)
- Those who support education more broadly (for example, supporters of ESL programs and learners)
- Cultivation gathering attendees
- Participants in social media (Facebook fans and Twitter followers, for example)

## Relevant Sector Research on Online Giving

### **The Donor Experience**

From *The Online Giving Study: A Call to Reinvent Donor Relationships*

- Online giving – most online giving (64.1%) occurs directly from a non-profit website; 10.4% through social giving and 25.5% through a portal such as Network for Good.
- “The level of connection to an organization that a donor experiences online is directly tied to their likelihood of giving more – and more often. Even small upgrades to the donor experience make a measureable difference in online giving.”
- Donor retention – in analyzing online giving, it is clear that the better the online experience is for donors, the higher the retention rate over time.
- Online giving through Facebook and the like is generally low, as many donors give through these social sites because of a relationship with a friend, fleeting impulse or a sense of convenience. Result: one-time giving, but does not establish a solid relationship with the organization.
- December and disasters dominate – 33.3% of giving happens during December; majority in last 2 days of fiscal year.