

DO *your* GOOD

Ticket to Successful Fundraising

Welcome,

I am so happy that you decided to sign up for my special six-month limited edition email series created just for you, my nonprofit friend. I want to help you succeed in your fundraising adventure for the cause you care about.

As I explained before, by signing up with me, you are engaging with someone who has real experience in both fundraising and in giving money away on behalf of donors.

I have helped donors give away over \$45 million in grants and donations, large and small. Each year, I review 150 to 200 proposals and get pitched almost every day by nonprofits like you.

It makes me happy when you do a good job. My number one lesson for you is that donors want to give their money to you as long as you approach them in a manner that inspires them and is directly connected to their interests and needs.

My weekly tips in this special six-month-long email series will cover the following topics, and much more:

- How to hone your pitch for greater impact

- How to focus on what matters the most
- How to create an effective budget
- How to structure a collaboration with other nonprofits to raise more money, not only for you but also for the cause you care about
- How to continue to tell your story over time, once you've received a donation from the donor

I am here for you, my nonprofit friend, and want you to succeed.

Let's get started!

Best,

A handwritten signature in cursive script that reads "Sybil Ackerman-Munson". The signature is written in black ink and is positioned to the left of the typed name.

Sybil Ackerman-Munson,
President, Do Your Good LLC

Week #1

Thank you for signing up for my 'Ticket to Successful Fundraising' email series. Welcome to our first lesson of this special limited edition six-month series. I'm excited to take you along on this insightful journey with me.

Let's transform your pitch to convince a donor or granting institution not just to WANT to give you money but make them feel like they NEED to give you money. When I say granting institution, I mean a private family foundation, donor, and/or another business entity in charge of offering grants and donations to a nonprofit organization like yours. For ease of discussion, I will use the term "donor" in reference to all of these possible giving institutions.

Here are two key steps to establish the NEED:

First, ask yourself if you are raising money from the right donor.

The donor I am reaching out to for funding cares about [Fill in the blank], which is directly connected to the core mission of my organization.

If you can't seem to figure out that clear connection, or you don't know enough about the donor to know if the connection can be made, you should move on to a different donor prospect. Do more research to figure out if there is a potential connection there. Whatever you do, don't jump in and randomly send out email requests to organizations that clearly are not a fit. Next week I will show you an example of what not to do when this happens so that you don't make the mistakes others have made in the past.

Second, once you can justify a connection to a potential donor, you are off to the races. Now it's up to you to tell a narrative for the donor to ultimately review that speaks directly to the donor and establishes a NEED.

1. Tell a relevant story and narrative to create a clear connection.

Fill in the blanks for the following sentence:

You [the donor or granting institution] care about _____ [talk about what you've identified in point #1 as the experience that the donor cares about]. We _____ [name your nonprofit] are specifically addressing the _____ [name the experience you know the donor cares about] in the following manner.

2. After you've made your story relevant, now define a NEED - this is where most proposals for funding fall short. I want you to succeed when many fail.

Fill in the blanks for the following description and make it your own:

As I understand it, [name the donor or granting institution] is focused specifically on [name what they are focused on] because you had an experience where you [name this experience]. Our organization is specifically offering a solution to this problem in the following manner. Explain how if you did not exist as a nonprofit, the following list of successes would not have occurred. Then say that looking to the future shows how you plan to move the needle on more significant wins for forward progress on the issue you and the donor cares about so passionately.

I hope you found this resource helpful. Keep an eye out for next week's email as we will be discussing real-life examples of a donation request to my clients that failed, and what one can do differently to turn that failure into a win for the future.

Until then, do good and do well.



Best,

Sybil Ackerman-Munson,

President, Do Your Good LLC

Week #2

As promised, I'm back this week to offer you a real-life example of how you can turn a failed funding request into a win. So let's get into it.

Failure... (I have changed the facts just slightly so as not to single out any one organization, but this is based on a real-life example).

"My name is XX and I am a grant writer reaching out on behalf of my client, Y. Y is an organization focused on minimizing the world's reliance on fossil fuels by creating solar-powered portable generators.

The Y team is composed of leading industry experts who have worked in the solar energy field for decades, seeking new ways to promote green energy..."

In the heading of this funding request, the address shows that the organization is based in New Mexico.

This proposal sounds well put together, right? It's working on solar projects to reduce greenhouse gas emissions - that sounds like a worthy topic.

The problem is that this request failed to connect its purpose with the goal or focus of the donor it was reaching out to. So, the institution ended up spending unnecessary and valuable money on a grant writer, while also wasting time on outreach to a donor who had no interest in funding the work.

Don't let this be you!

Here are the top three reasons why this proposal failed:

Problem #1: It was a generic template with no clear connection or personalization to the institution it was addressing.

For instance, the private family foundation that this letter was emailed to had a website that clearly stated its funding region was the Pacific Northwest only. The grantee list showed that it had almost never funded a project like the one outlined in the request.

Solution: Personalize the letter to explain why the request is relevant to the donor's interest. *Fill in the blanks to this key sentence for a solution to this problem.*

We _____ [name your nonprofit] are specifically addressing the __ [name the experience you know the donor cares about] in the following manner.

And if you can't make a direct connection do not spend the time to send out an email or letter.

Problem #2: While it's fine to have a grant writer ghostwrite your requests, make sure you don't have your grant writer sign the request, as done in this situation.

If the organization doesn't even take the time to include its staff in the fundraising outreach then why should a donor reciprocate and take the time to review and fund the organization? When no staff signs the request, it also feels like the organization is not accountable and it's unclear if the organization is directly on board with the request itself.

Solution: The request should be personal and signed from your organization's key staffer who is working on the issue that you hope the donor or institution is interested in funding.

Problem #3: If the headquarters of the nonprofit is not located in the region where the donor is funding, the donor or grant-making institution will likely tune out the request.

In this case, the letter had a heading with a New Mexico address, which was outside the donor's geography.

Solution: You can get around this challenge by stating in the first paragraph that your organization is working in the region where the donor funds, even if the headquarters are out of the region. The location question should be addressed upfront and right off the bat in your request.

Now that you have an idea of what bad donor requests look like, I'm going to give you an example of a successful request in next week's email to you and why it was funded.

In the meantime, do good and be well.

A handwritten signature in cursive script that reads "Sybil Ackerman-Munson".

Best,

Sybil Ackerman-Munson,

President, Do Your Good LLC

Week #3

As mentioned last week, today I'm going to offer you an example of the type of funding request that succeeds. Then I'll go on to explain why it's a win.

As I recall the successful pitches I've encountered, I'm flooded with memories of amazing nonprofits that do a good job of establishing the NEED to fund donors. After much thought, I decided to go with this example below because I thought it was a very well-written letter.

(I have changed the facts of this slightly so that I don't single out any one organization.)

The organization below received way more money than they asked for from one of my clients, for many years in a row. This is the pitch they came up with:

"After experiencing more than one climate emergency in the past year, X is focused on the intersection of climate action, forest defense, clean water advocacy, and community preparedness.

With our ForestWatch program, we are keeping a close eye on Y & Z as the agencies consider post-fire forest management activities... We have developed a good working relationship with the new US Forest Service Wild Rivers District Ranger, who has been responsive to our concerns on roadside and riparian logging."

Here are the top three reasons why this proposal succeeded:

1) It's about a personal connection - The pitch established a NEED in order to entice a donor to contribute to the nonprofit and to connect the work personally to the donor. As a reminder from email #1, *Fill in the blanks for the following description and make it your own.*

"As I understand it, [name the donor or granting institution] is focused specifically on [name what they are focused on] because you had an experience where you [name this experience]. Our organization is specifically offering a solution to this problem in the following manner..."

2) The ask fits the guidelines: The Foundation Guidelines expressly asks for proposals that are focused on the intersection of climate action, forest defense, clean water advocacy, and community preparedness. The request is genuine in delivering exactly what is donor is asking to fund - a perfect fit!

3) It's directly connected to staffers who will deliver on the promises: This request and the personal conversation came directly from the Executive Director who also included his key staffers in the conversation. He did a great job showing my client that they could do a lot with the grant and that they cared enough to show up personally.

This request treated the donor as a person, instead of simply a bank transaction. As you can see, the write-up was good, but it also had the element of personalization and attention to detail, two important components of effective fundraising.

I hope this email helped you understand what you need in order to create a successful funding pitch for your donor. Next week, we will outline what you should emphasize in your Annual Report of Interest to a donor.

A handwritten signature in black ink that reads "Sybil Ackerman-Munson". The signature is written in a cursive, flowing style.

Best,
Sybil Ackerman-Munson,
President, Do Your Good LLC

Week #4

Today we're going to talk about what you should include in your Annual Report to catch a donor's attention.

Problem: Oftentimes an Annual Report can be lengthy, text-heavy, and overly focused on the old-fashioned paper version that is simply discarded or recycled prior to reading.

Solution: Make it easy to skim through so that a donor can easily see and understand your past successes and how you are setting yourself up for success in the future.

I've listed below what I believe is the best way to entice a donor to not only read your Annual Report but to also remember it.

I care deeply about this topic. I can't tell you how often I get inquiries from my philanthropic clients asking if they can rip up and recycle an Annual Report that they got in the mail without even reading it.

I don't want this to happen to you! I want your Annual Report to be a must-read.

Here are the top three items to make your Annual Report shine:

1. Pick one major win as the key theme.

Work with your team to highlight what accomplishments you are most proud of. Pick one that defines your organization and will help you tell the story of why you continue to be relevant in the issue area you care about.

2. Explain an exciting opportunity for the future.

After defining your win, explain how your forward momentum opens the door to a major exciting opportunity for progress. Tout your past successes and also talk about how you will continue to be relevant in future years.

3. Showcase your financial situation.

In clear graphs and charts show how you are doing financially. This includes a pie chart that shows how much of your funding is coming from membership, Foundations, Government, or other sources.

If you have had any financial challenges in the past year, this is the time to also discuss those challenges and how you plan to overcome them.

Your Annual Report is also a good place to thank major donors and profile one or two of them at the end of the report.

Recommended Exercise

To make sure your Annual Report offers the right takeaways when someone skims through the contents, find 7-10 people that you trust and send them a draft mock-up. Ask them to read it quickly and offer you their opinion. If they can tell you the major win, your financial status, and the thing that excites your organization most about the future, then you have an Annual Report that donors most likely will review and remember.

Next week, we're going to be focusing on websites. You will learn about what you need to include on your website to capture a donor's attention.

Until then, do good and be well.



Best,

Sybil Ackerman-Munson,

President, Do Your Good LLC

Week #5

Today we're going to discuss what a donor looks for when they review information on your nonprofit organization's website. Think of the following situation:

Problem: A donor, oftentimes, goes to your website with very specific questions they want answers to. However, they might have trouble finding relevant and up-to-date answers. This can leave them feeling discouraged and skeptical about your work, and can leave you missing out on future support from the donor.

Solution: Create a website that has accessible and easy search features, offers up-to-date, valuable information, and tailors the content to meet the needs of the donor or philanthropist doing the research.

I care about this topic for a number of reasons. Personally, I often know a lot more about a nonprofit than what is presented on its website. However, when a client of mine, a donor, goes onto the nonprofit's website, he/she comes out of the experience in a negative way most of the time. Sometimes it even means that the donor decides not to fund that nonprofit's work.

I don't want this to happen to you.

Here are some tried-and-true tips on what to include to create a winning website:

1. Home Page

- Include your goal/mission statement
- List your major accomplishments
- List the major challenges and how you plan to overcome them to reach your goal/mission
- Personalize your work through stories about people who were inspired by the work you do to make the world a better place

2. About Page

- Include links to all your past annual reports
- Include staff and board lists that have emails and bios

3. News Section

- Include a brief description for each news article that explains why it is relevant to your work (do not just link to the story without including a short narrative)

4. Volunteer Activities

- Include a clear list of all events people can participate in with an easy-to-use sign-up form.

5. Breaking News

- Include a tab with a blog that talks about the most recent and relevant activities you are working on - keep this section updated daily, if possible.

Whenever possible keep language simple and easy to understand with real-life stories that include personal experiences people can relate to in talking about your accomplishments. Don't feel like you need to include everything possible on your website - instead, make it easy to navigate, and organize the issues and topics you'd like to cover.

I hope this email helped you understand what you need in order to create a successful website for donors' needs. Next week, I will help you figure out how to talk about your desire to advocate for change while treading that "lobbying" line with care so as not to freak out your prospective donor or have them run for the door.

Until then, do good and be well.



Best,

Sybil Ackerman-Munson,

President, Do Your Good LLC

Week #6

Have you considered lobbying to change an existing law or create a new one to help you overcome obstacles to your nonprofit's success? If you haven't already, chances are at some point you will want to.

I'm going to tell you why that's necessary, especially if you are based in the United States, whether today or down the line.

Example: Wildfires are ravaging your community. Low-income households are finding it difficult to purchase air filters to help them breathe clean air during really smokey air quality. You want to lobby Congress and your State Legislature to provide air filtration systems in rental units. This requires lobbying to create a law that makes it mandatory for landlords to pay for and offer air filtration systems in rental units.

Problem: In the United States private family foundations and donors are not allowed to take a tax deduction if they fund lobbying activities. I have found that a lot of the time, nonprofit leaders get worried about mentioning their lobbying activities. This becomes a problem because you end up leaving out a lot of your major work that the donor may generally be interested in knowing about, even if they can't fund it directly.

Solutions:

1. If you are asked to write a proposal or give a presentation, clearly state that no private tax-deductible funds are dedicated to lobbying.
2. Ask for general support rather than project funding from the donor. If it is a general support donation, the donor cannot direct you in any way. This means that you can do what you want with the funding provided you are complying with applicable laws for public charity.
3. If the donor wants to offer you money for a specific project - write a budget that has a lobbying line item and be sure that the total project budget is not larger than the individual donation. For example, if your overall project budget is \$100,000 and the amount you are spending on lobbying is \$10,000 then the individual donation for the project can't be over \$90,000.
4. You can simply ask the donor if they mind funding you to lobby directly and not to get the tax break.

Remember that in the United States, you are allowed to lobby if you are a public charity, as long as it is not a substantial part of what you do and/or you have filed for what is called an "h" exemption. This is why it can get confusing for you – private donations are often more limited than what you are actually allowed to do as a public charity. So, I often have conversations with nonprofit leaders who are baffled about how to talk about this aspect of their work with donors.

I also created a special mini-course that includes detail on legal and lobbying issues to consider. Check the course out here – [Be Legal Mini Course*](#).

I hope this email helped you to better understand what you need in order to talk about lobbying in the United States. If you reside outside of the United States, this advice may not apply directly to you. If this is the case I want to help you dissect lobbying based on your special circumstance because it matters how you present this element of your work no matter where you are in the world.

Please offer your specific situation in [this survey](#), and I will get back to you personally.

Until then, be good and do well.

A handwritten signature in black ink that reads "Sybil Ackerman-Munson". The signature is written in a cursive, flowing style.

Best,
Sybil Ackerman-Munson,
President, Do Your Good LLC

***Disclaimer:** Please consult your attorney with real legal questions. My advice is in no way meant to supplement or be the final word on any legal matters related to lobbying for IRS compliance purposes. I am simply offering general guidance.

Week #7

It's important for you to know the difference between general support and project funding because you don't want to get stuck asking a donor for project funding when they really want to give you general support, and vice versa. If you make the wrong ask they often won't fund you.

I focus on concepts as established in the United States for this one, but the general concepts apply around the world.

When to ask for project funding:

- The donor is interested in one very specific issue or activity you are working on.
- You need an infusion of funding for a time-limited period to accomplish a specific task.
- You have deliverables and outcomes that you are comfortable offering to the donor as measurable benchmarks for success.

When to ask for general support funding:

- The donor loves everything about your organization.
- The donor is not planning to direct you in any way regarding the donation – they trust you to get the job done.

Benefits of project funding:

- The donor, oftentimes, can get invested in your work at a very deep level.
- The donor becomes a thought partner/expert and may even help you to raise even more money for the cause you care about – they can be a helpful advocate because they are so knowledgeable about the specific project you are working on.

Benefits of general support funding:

- You get the donation with no strings attached and can do what your organization deems necessary to accomplish your overall goals.
- Overhead is lower because you do not need to focus on a separate project budget with specific outcomes and benchmarks, as often required with a project ask.

I hope this email helped you to better understand the difference between general support and project funding. Next week, I will teach you about the three distinct types of donors - each type requires a different approach to maximize your fundraising potential.

Until then, do good and be well.

A handwritten signature in black ink that reads "Sybil Ackerman-Munson". The signature is written in a cursive, flowing style.

Best,

Sybil Ackerman-Munson,

President, Do Your Good LLC

Week #8

In my many years of work as a philanthropic consultant, I notice that there are three distinct types of donors. By figuring out which type of donor you are talking to from the beginning, it will save you time and money, and allow you to hone your pitch accordingly.

In this email, I will introduce you to those three types of donors.

The three types of donors are:

1. The Sustainer, 2. The Campaigner and 3. The Launcher.

Definitions:

The Sustainer type of donor supports their favorite nonprofit(s) consistently year after year. They feel that a successful funding strategy relies on general support donations, without any strings attached. The donor trusts the nonprofit completely regarding how it expends funding support.

The Campaigner donor sees an exciting opportunity but is concerned about a problem standing in the way of success. They want to fund organizations working on solutions to the identified problem with a clear timeline, benchmarks and outcomes. Once the organization is no longer necessary to remove said problem and has successfully achieved the solution, the organization is no longer funded by this type of donor.

The Launcher type of donor is similar to the Campaigner because they see an opportunity and a major problem standing in the way of success and want to mount pressure to find a solution. The difference is they are primarily interested in filling a gap for ultimate success. They will help to start a new organization and/or add funding to an existing nonprofit to fund a program or project that does not currently exist but is necessary to successfully accomplish a win.

I want you to take some time to think about these three different donor types this week and consider the people who are currently giving you donations.

Can you place your major donors in these categories? If so, do you think you've been talking to them about your work in a manner that will truly capture their interest?

I want you to take some time to think about these three different donor types this week and consider the people who are currently giving you donations.

Can you place your major donors in these categories? If so, do you think you've been talking to them about your work in a manner that will truly capture their interest?

I hope this email helped you understand a sustainer, campaigner and launcher donor. In my next email, I will focus on how you can hone your pitch appropriately based on the type of donor you are talking to.

Until then, do good and be well.

A handwritten signature in cursive script that reads "Sybil Ackerman-Munson".

Best,

Sybil Ackerman-Munson,
President, Do Your Good LLC

Week #9

We talked about the three main categories of donors in last week's email – Sustainer, Campaigner and Launcher. Over the next three weeks, I will provide you with strategies on how to bring these three types of donors into your world.

Today, our focus is on how you can hone your pitch to attract a Sustainer donor to your organization and cause.

I want you to be the type of fundraiser who can pivot your message easily and effectively depending on the type of donor you are talking to. The best fundraisers know exactly how to approach the different types of donors with ease and alacrity. I'm going to help you hone your skills to be the best!

In order to do that, let's get to work and learn more about how to approach a Sustainer donor.

As you'd recall, a Sustainer donor is a type of donor who "supports their favorite nonprofit(s) consistently year after year. They feel that a successful funding strategy relies on general support donations, without any strings attached. The donor trusts the nonprofit completely regarding how it expends funding support."

Remember

A Sustainer donor cares about everything your organization does and has a deep personal connection to the work.

Here are four proven strategies to identify a Sustainer donor:

1. While researching donor prospects, you'll find that Sustainer donors' websites, quotes, or interests speak to the fact that they generally give to nonprofits that work on a cause. For instance, you might find something like, "I trust the nonprofit to do the best work possible for the cause I care about," or "I believe in trust-based philanthropy."
2. If you're trying to reach a Trustee at a private family foundation, review the 990s (if in the United States) and/or their website to find out if the grants they offer are mostly for general support rather than for projects.
3. When talking to a potential donor, check to see if they're inspired by everything your nonprofit does (and not just a subset of your work).
4. If your prospect tells you a personal story that directly connects them to what your organization does, you've most likely found a Sustainer donor.

Once you have identified that the person you are talking to is a Sustainer donor, the next step is to connect with them in an appropriate manner to maximize your chances for a donation.

Here's how you can communicate with a Sustainer donor in five steps:

1. Connect the donor's personal story to your nonprofit's mission, vision and goal.
2. Prove you are a durable organization, around for the long haul, and therefore have the years of experience necessary to succeed for many years to come.
3. Demonstrate strong business acumen in your finances, staffing, and Board recruitment.
4. Expand the donor's community of friends by inviting them to your educational opportunities, fundraisers, volunteer outings, and any other planned activities.
5. Regularly update the donor about what excites you most about the work that your organization is accomplishing (especially when the activity connects directly to the donor's personal story).

What Not To Do: Do not take your Sustainer donors for granted. Do not stop communicating regularly with them once they give, other than to ask them for that yearly donation. This is a mistake I see all too often – the donor stops getting regular updates and is only approached for money once a year. To avoid this mistake, continue reaching out to the donor using the same five steps I recommended when you are originally recruiting them for a first-time donation.

Special Word Of Advice: Be patient. It can take years of cultivation for a donor to ultimately become a Sustainer donor. Once they are with you chances are high that they will stay with you for many years to come, provided you continue to reach out to them using the five key steps above.

I hope this email helped you understand how to reach a Sustainer donor. In the following email, I will focus on how you can hone your pitch for a Campaigner donor, and the week after, a Launcher donor.

Until then, do good and be well.

A handwritten signature in cursive script that reads "Sybil Ackerman-Munson".

Best,

Sybil Ackerman-Munson,

President, Do Your Good LLC

Week #10

In last week's email, we learned how to identify and recruit Sustainer donors into your organization's portfolio. This week, we will focus on how to reach a Campaigner donor. I want you to be the type of fundraiser who can pivot your message quickly and effectively. The best fundraisers know exactly how to approach all types of donors differently, with ease and alacrity. I want to help you have the skills to be the best!

So, let's get to work and learn more about how to approach a Campaigner donor.

To quickly recap, here's the definition of a Campaigner donor:

"The Campaigner donor sees an exciting opportunity but is concerned about a problem standing in the way of success. They want to fund organizations working on solutions to the identified problem with a clear timeline, benchmarks, and outcomes. Once the organization is no longer necessary to remove said problem and has successfully achieved the solution, the organization is no longer funded by this type of donor."

Remember

The Campaigner cares most about solving a problem standing in the way of a cause that they care about.

Here are four strategies to identify a Campaigner donor:

1. While researching donor prospects, you'll find that Campaigner donors' websites, quotes, or interests include statements about how they deeply care about a cause, such as houselessness, climate change, education, etc.
2. If you're trying to reach a Trustee at a private family foundation, review the 990s (if in the United States) and/or their website to find out if the grants they offer are mostly for projects, rather than general support.
3. When talking to a potential donor, check to see if they're inspired by the fact that you're working to solve a critical problem that the donor sees as standing in the way of success for the cause they care about.
4. Check if the donor is interested in leveraging resources not only from your organization but from a coalition, in order to overcome an obstacle standing in the way of success.

Once you have identified that the person you are talking to is a Campaigner donor, the next step is to connect with them in an appropriate manner to maximize your chances for a donation.

Here's how you can communicate with Campaigner donors in five important steps:

1. Focus on how your organization is helping solve the problem the donor cares about, with a clear goal for success, benchmarks and a set timeline.
2. Demonstrate that you are working in coalition with other organizations and experts to achieve success.
3. Offer a project budget, in addition to your organizational budget, that clearly explains how you will fund the work within a specific time frame.
4. Regularly update the donor when you hit a major milestone in the project they are funding you to work on. If you fail to reach a benchmark, explain how you plan to pivot your strategy to be successful, despite the setback.
5. Invite the donor to events and activities that address the issue they are funding your organization to work on.

What Not To Do: The Campaigner is not necessarily in this to build their community of friends or to go to long meetings/educational events. Focus on inviting these donors only to events related to the project they are funding you to work on. Downplay the rest of the work you do because that may clutter their email and cause them to overlook your successes when it's actually important for them to notice just that.

Special Word Of Advice: You'll find that a Campaigner donor can help you leverage resources and expand your reach to additional potential donors via funder circles and donor networks. They can help you expand your work in ways Sustainer donors can't, since these types of Campaigner donors are so involved in the specific issue and can have an expansive view of the potential solutions to a problem you also believe needs solving.

I hope this email helped you learn how to reach a Campaigner donor. Next week, I will focus on how you can hone your pitch for a Launcher donor.

Until then, do good and be well.

A handwritten signature in black ink that reads "Sybil Ackerman-Munson". The signature is written in a cursive, flowing style.

Best,

Sybil Ackerman-Munson,

President, Do Your Good LLC

Week #11

In last week's email, I explained how to identify and recruit Campaigner donors into your organization's portfolio. This week, I will talk with you about how to reach a Launcher donor.

I want you to be the type of fundraiser who can pivot your message easily and quickly. The best fundraisers know exactly how to approach the different types of donors with ease and alacrity. I'm going to help you hone your skills to be the best!

In order to do that, let's get to work and learn more about how to approach a Launcher donor.

As you'd recall, a Launcher donor is similar to the Campaigner because "they see an opportunity and a major problem standing in the way of success and want to mount pressure to find a solution. The difference is they are primarily interested in filling a gap for ultimate success. They will help to start a new organization and/or add funding to an existing nonprofit to fund a program or project that does not currently exist but is necessary to successfully accomplish a win."

Remember

The Launcher cares most about discovering a gap to fill in order to solve a problem standing in the way of a cause that they care about.

Here are five strategies to identify a Launcher donor:

You will notice that four of the strategies are similar to the Campaigner. Importantly, though, the fifth strategy is critical to distinguish the Launcher from the Campaigner donor.

1. While researching donor prospects, you'll find that Launcher donors' websites, quotes, or interests include statements about how they deeply care about a cause, such as houselessness, climate change, education, etc.
2. If you're trying to reach a Trustee at a private family foundation, review the 990s (if in the United States) and/or their website to find out if the grants they offer are mostly for projects, rather than general support.
3. When talking to a potential donor, check to see if they're inspired by the fact that you're working to solve a critical problem that the donor sees as standing in the way of success for the cause they care about.
4. Check if the donor is interested in leveraging resources not only from your organization but from a coalition, in order to overcome an obstacle standing in the way of success.
5. The Launcher is more interested in the gap(s) holding your organization back from ultimate success, such as a need for more communications/media or scientific data to move the needle on the issue the donor cares about. The launcher donor also wants to be sure that over time you have a plan to recruit even more donors to fund the gap that they want to fill.

Once you have identified that the person you're talking to is a Launcher donor, connect with them in an appropriate manner to maximize your chances for a donation.

How to communicate with Launcher donor in five key steps:

1. Focus on how your organization is helping to address the gap that the donor wants to fill with a clear goal for success, benchmarks and a set timeline.
2. Demonstrate that you are working in coalition with other organizations and experts to achieve success to fill the gap.

3. Offer a project budget, in addition to your organizational budget, that explains clearly how you will fund the work within a specific time frame and how the gap they are filling will ultimately receive additional funding over time from a diverse array of sources (so that the Launcher is not on the hook for the entire budget for multiple years).
4. Regularly update the donor when you hit a major milestone in the project they are funding you to work on. If you fail to reach a benchmark, explain how you plan to pivot your strategy to be successful, despite the setback.
5. Invite the donor to events and activities that address the issue they're funding your organization to work on.

What Not To Do: As you now know, the Launcher is focused on filling a gap. As such, invite them only to meetings that involve the issue they care about and the gap they want to fill. Don't only invite them to the general events that you organize for all donors and volunteers because that will distract them from the cause they care about and may make them less excited about the work you are doing with them to fill the gap.

Special Word Of Advice: Similar to a Campaigner donor, a Launcher can help you leverage resources and expand your reach to additional potential donors, via funder circles and donor networks. They can help you expand your work in ways Sustainer donors can't since they are so involved in the specific issue and can have an expansive view of the potential solutions to a problem you also believe needs solving.

I hope this email helped you learn how to reach a Launcher donor. In the next email, we're going to talk about how you can time your pitch perfectly when presenting to the market. I look forward to our next conversation.

Until then, do good and be well.



Best,
Sybil Ackerman-Munson,
President, Do Your Good LLC

Week #12

In these last few years, the stock market has been topsy-turvy. Assuming that the ebbs and flows have been stressful for your organization, it's time to take advantage of the times the stock market is doing well. Use the booming stock market period to get more money from donations. In my experience, almost no organization makes a clear pitch for what they would do with the extra money when times are good. From personal experience, I know that you're leaving money on the table if you don't leverage this opportunity.

Whether you're looking for donations from a family foundation or are generally recruiting donors, I have some very important tips for you.

Generally, when people get good returns on their stock market investments, they have extra money that they want to use to fund good causes like yours.

Did you know that private foundations have a law that requires them to give away more money when their endowment is booming? Specifically, in the United States, when the private family foundation's endowment is doing well it needs to give away more money in order to stick with the 5% payout rule, as required by the Internal Revenue Service (IRS). The private family foundations must give away 5% of the fair market value of their endowment each year for charitable purposes (IRS section 4942). If the private family foundation fails to comply, they're charged a 30% excise tax (see [IRS Website](#)).

Over time, I have interacted with Trustees who ask me if there are causes they can provide additional grants to at the end of the year. They do this to give away more money than they had planned to, due to the IRS guidelines. Based on my years of experience in this, I have managed to connect my clients with the right organizations to help.

Taking this important factor into account, you should make it easy for donors to give you more money when the market is strong by clearly laying out your needs during times of plenty.

Tip: When the market is strong - do not be shy!

Communicate with your donors about your programs that may need an extra boost of funds – pitch during times of plenty. Send out a newsletter in September so that it is on their radar well before the end of the year, which is when they do full accounting of how much money they want to give away for tax purposes.

Don't hide your intention – clearly state “the market is strong and if you want to give more this year we have clear ideas for how you can make that extra bit of difference.”

Timing Your Pitch: Private family foundations calculate what they need to give based on the past year's performance. This means if the market was booming a year ago, you should focus on redoubling your outreach efforts for additional funding the following year, even if it appears the stock market is slumping the following year.

In contrast, for private donations not associated with a private family foundation, you should ask for funding when the market is booming in real time. For example, the stock market was booming in 2021 but was hit in 2022. So, for private family foundations, you would have wanted to focus on redoubling your pitch in September 2022, but for private donations, you would have wanted to redouble your efforts in 2021. Since 2022 was a tougher year, 2023 is a year when many private family foundations reduce their giving. Pay close attention to the market in order to figure out the timing of your pitch strategy.

I hope this email helped you understand how to pitch during times of plenty. In my next email, I will focus on a new issue - how to write an effective project budget.

Until then, do good and be well.

A handwritten signature in black ink that reads "Sybil Ackerman-Munson". The signature is written in a cursive, flowing style.

Best,

Sybil Ackerman-Munson,

President, Do Your Good LLC

Week #13

In this email, I sum up the common mistakes that you should avoid so that your project budget reads like a powerful proposal a donor wants to support.

When you want to accomplish a specific task within a clear timeframe, you will need to write a clear project budget asking for support. A project budget is most commonly used as a companion to your organizational budget. Unlike a project budget, the organizational budget offers financial information for your entire organization whereas a project budget is laser-focused on one specific activity your organization is diligently working on.

Campaigners and Launchers are the two types of donors who are very likely to ask you for a project budget in addition to your organizational budget. This is because they only want to fund specific projects and are not necessarily as interested in supporting your entire organization in general.

Considerations:

The money dedicated to the project must match your ambitions in the project write-up.

If you have a very ambitious project you want to be sure the project budget asks for enough money to accomplish the tasks. All too often I see an amazing proposal write-up only to notice that the budget allocates only a tiny percentage of one person's staff time to a very ambitious project. When this happens it feels like the organization is not being realistic and may not succeed.

Your organization should dedicate its own funding to the project:

If your organization does not also allocate general support dollars to the project, it feels like it's just an add-on and that you are not committed. You should be especially sensitive to this if your project is local but you are a part of a major national or international organization - this is when I see the disparity most often because the national or international organization, which often has millions of dollars but is not dedicating money to the project - this can kill funding prospects for an otherwise terrific project.

Name the partner foundations and donors supporting the project, by amount and whether the ask is secured or pending:

This list is important because funders and donors talk to each other. The more partners you have on the list that the donor prospect knows the better. This is because it shows that you have support for your program from a wide range of interested philanthropists.

A project budget needs to address lobbying correctly:

This is a special tip if you are a United States-based non-profit. Unlike a general support grant, a project proposal must abide by special lobbying rules. I offer a special mini-course on how I look at the lobbying rules. You can check it out [here](#):

The main thing is, none of the foundation/donor funds can include lobbying to pass legislation if the donor wants the gift to be tax deductible. This means it is best to simply have a line item that explains how much you plan to spend on lobbying and add a very clear disclaimer that none of the foundation/donor funds will be used for lobbying purposes. Be sure to talk with your lawyer to tailor your proposals appropriately if you do have any lobbying in your program.

Include a clear explanation of your overhead fee (and what you define as overhead):

Be sure to ask the donor up front how they feel about overhead charges. Some donors like to pay this type of fee for administrative costs like rent, and other donors are completely against it and only want to pay for the project. If you press for something the donor does not believe in, you may not get the grant or donation at all (I have seen it happen). In my experience, donors have very strong opinions about this issue and it does little to argue the point. Simply tailor your budget accordingly for those who are okay with paying overhead versus those who do not want their donation going to overhead costs.

Timing is important:

Donors who like to fund projects tend to not have general or publicly available requests for proposals. Instead, they are usually invite-only. Therefore, it is important to reach out to these donors and/or the program officers in January when dockets often refresh, and again in May, when the donor is locking in on their funding strategy. If, by then, you have not been asked by the donor to submit a proposal or request, then reach out once more in September or October. Timing your communication with a major milestone in the project is a great way to share the good news with the donor and grab their attention.

Cadillac and non-Cadillac version:

Oftentimes, I see nonprofits struggle with a project budget because they either ask for too little or too much support, which disillusions the donor and has them ultimately reject the project altogether. To get around this problem, you may want to include two versions of your project budget. One version shows what you will do if you raise the maximum amount of money that you seek, and the second version is more of an austerity budget which explains how you will accomplish your goals even if you receive a smaller amount of funding for the project than anticipated.

Align your project with your organizational budget:

Make sure that the amounts you are asking for in the project budget show up in your organizational budget. This is to prove that the project is an integral part of your overall program and not just an add-on that is a secondary thought and therefore appears like it is not a priority for your organization.

Include the cost for the entire budget:

A common mistake made by nonprofits involves creating a project that only explains how the specific donor's funds will be used to accomplish the goal. Make sure you offer a project budget that is larger than the amount you are asking for from that donor, because if it looks like your entire project is funded by just one donor, one of two problems can occur: (1) it could appear that you are over-reliant on one donor, which may cause the donor to get cold feet or ask you to match their funds in order to offer you less than you are asking, or (2) if you actually do need more money to successfully accomplish the project, then you've inaccurately suggested you only need one donor's funds to finish the work. If you have a larger budget for your project that truly reflects what you need to succeed, you may be surprised to find that the supportive donor will then reach out to their friends and colleagues to pitch your project to them and come up with more funding. But this is impossible if it looks like your project is fully funded with just one donation.

Include income as well as expenses:

It is very important that you include income and expenses in a project budget so that the donor can fully understand the array of funds you are seeking to succeed at the task at hand. Most folks get this right, but at least once or twice a year, I receive project budgets without income details. It makes you look disingenuous – I don't want this to be you.

Feel free to check out one of my most popular free resources, a project budget template, [here](#).

I hope this email helped you understand what to focus on for your project budget. In my next email, I will focus on a new issue – the important information to include in an organizational budget.

Until then, do good and be well.



Best,

Sybil Ackerman-Munson,

President, Do Your Good LLC

Week #14

In this email, I will tell you about the common mistakes you should avoid when creating an organizational budget. Make your budget read like a powerful narrative in support of your write-up. I want you to shine in your budget writing so that donors are inspired to fund your good work.

Transparency is critical.

Oftentimes, I am left wondering about budget totals and line items. To eliminate this problem, use footnotes to describe anything you think may be confusing and/or lead your donor to ask questions about the quality of your budget proposal. If your budget looks peculiar, you will create suspicion about the quality of your overall proposal, no matter how compelling your narrative.

Distinguish funds for your core operations vs. fiscal sponsorships, one-time large expenditures, or government contracts.

Your budget can look off if you fiscally sponsor start-ups or have one-time larger expenditures and/or major government contracts. If these extra expenses are not categorized well in your budget, it could appear that you are fully funded and do not need your donor's support for core operations. This can look confusing to a donor if they are interested in funding your operations, but the budget appears overinflated.

Consider your fiscal year.

It is critical that you explain how similar or different your future year's budget will be, especially if you are asking for a donation at the tail end of your current fiscal year. This occurs when your Board has not yet approved your future year's budget, even though you are asking for a donation for that future year. Take the guesswork out of this fiscal year situation and let the donor know exactly which fiscal year their donation will connect with. If it is for a year without a finalized budget, let them know when to expect the future year's budget. Additionally, mention whether the numbers will be fairly similar or if there are other circumstances the donor should know about in advance.

Avoid red flags that will reduce confidence.

Here is some information that you want to avoid incorporating into your organizational budget:

- Budget in the red
- No explanation of a rainy day fund (3-6 months of reserve)
- No indication of key items that your narrative states you will accomplish in the upcoming year
- An out-of-date or quickly expiring budget at the end of your fiscal year
- Unclear income streams

I hope this email helped you understand what to focus on for your organizational budget. In my next email, I will focus on a new issue - the top three things to avoid when approaching a new donor prospect.

Until then, do good and be well.



Best,

Sybil Ackerman-Munson,

President, Do Your Good LLC

Week #15

Do you feel like you cannot successfully connect with donor prospects you think should be a certain win for your organization? I often get pitched by nonprofit leaders who are baffled by the fact that they cannot make that connection and land a donation.

Today, I'm going to share three strategies that simply do not work. This is important because I do not want you to miss out on a prospective donor connection.

Three things not to do when approaching a new donor prospect:

1. You fail to identify whether the prospective donor is a sustainer, campaigner or launcher. You make the mistake of pitching a sustainer donor like they are a campaigner or launcher, or vice versa.
2. You exaggerate the influence of your organization and do not acknowledge the hard work of the partner organization in helping you to accomplish your goal or task at hand.
3. Your materials are confusing and fail to clearly explain how you plan to succeed.

A special tip for those talking to an intermediary, a staffer/program officer or a consultant doing the due diligence on a donor's behalf:

Even if you know the donor personally, remember to keep the intermediary and/or staffer for the donor who is responsible for putting together funding recommendations (I will hereafter refer to all of these roles as an "intermediary") in the loop about your conversations with the donor.

It is completely fine to talk directly with the donor if you already have a good relationship with them, but you want to give the intermediary a heads-up so that they can also support you and back you up. You do not want the intermediary to be caught off guard by a proposal that you are pitching to the donor. If your donor hired an intermediary, it was with reason, and they will almost always ask that person's advice prior to offering a donation.

I hope this email helped you understand the top three things to NOT do when pitching a prospective donor. In my next email, I will focus on the three things to do to maximize your chances of success.

Until then, do good and be well.

A handwritten signature in cursive script that reads "Sybil Ackerman-Munson".

Best,

Sybil Ackerman-Munson,

President, Do Your Good LLC

Week #16

I want to share three strategies that are most likely to get your donors to fund you year after year. Successful fundraisers are able to read the tea leaves and pivot their message successfully every year, while staying focused and true to their organization's mission and goals.

The top three things fundraisers should do to be successful:

1. Make the connection between your organizational priorities and the most important current events that influence your work.

Whenever there is a major current event that is connected to the work you are doing, send out an email or post the information on social media, connecting your organization's response to the major development in current events. If the event is extraordinary, organize a special webinar for your major donors and donor prospects explaining the issue and your role in addressing the topic. Do not assume that the donor already knows how you are connected to the work, or has even seen the update.

2. Carefully time your personal emails, text and phone calls to when there is a major change or issue you know your donors will care about. This will remind them about their giving priorities for that given year.

Donors do not necessarily think about giving all year round. They tend to start out the year by considering what they want to prioritize and usually lock in their giving strategy by May or June. This is usually the case, even if they do not send through checks until the end of the year. Therefore, you should communicate more frequently towards the beginning half of the year. You also want to make sure they remember you towards the end of the year but if you wait until the end of the year to reach out you may have missed your window. The best fundraisers send me information they know is relevant and personalized to the donors I represent by keeping this timeline in mind. I go into more detail about the best way to personalize your email in my special [Be REAL! mini-course Level Up](#)

3. The best fundraisers know that when they are talking to a campaigner or launcher donor, they need to get right into the issue the donor cares about. These fundraisers know how to pivot their message and talk about the hands-on services they offer, like tree plantings, food kitchens, or home building that they do to directly serve their sustainer clients. I also have a special mini-course focused on this issue: [Be Empathetic](#)

I hope this email helped you understand the top three things to do when pitching to a prospective donor. In the next email, I will focus on the strategies that keep a donor coming back every year to fund your work.

Until then, do good and be well.

A handwritten signature in black ink that reads "Sybil Ackerman-Munson". The signature is written in a cursive, flowing style.

Best,
Sybil Ackerman-Munson,
President, Do Your Good LLC

Week #17

Have you finally convinced that amazing person or philanthropic institution to give your organization funding and support? Good for you. However, this marks just the beginning of your journey to keep this donor or philanthropic institution engaged. I am sure you know that you definitely can't rest on your laurels, but it's not always obvious what to do next to keep that energy and support going year after year.

In this special email with advice for you, I offer you my top three tips to help you convince your donors and philanthropic institutions to support you every year, and not only with a one time gift.

The top three things you should do to help you keep that donor and philanthropic institution coming back year after year:

1. Send the donor personalized emails any time you have a special event or major breakthrough related to the issue you know that they care about.
2. Keep your website and social media up to date to highlight any major breakthroughs or successes that your organization is instrumental in orchestrating, and in real time right when the major accomplishment occurs.
3. Establish your authority and expertise on the subject matter by offering easy to understand fact sheets, webinars, and outings to educate donors and philanthropic institutions about the issues that your organization knows about.

The major pitfall to avoid:

Do not communicate with a donor or philanthropic institution only once a year to ask for money. You'd be surprised how many organizations seem to simply assume that the donor will maintain their interest and only approach them once a year for money. Instead maintain a relationship with a donor similar to how you'd make an effort to keep a good friend. You don't only go to your friend to ask for money or support in times of need do you? This is how good fundraisers keep their donors - they go out of their way to truly care about the connection and take care to prioritize the three positive steps I outline above.

Best of luck to you in maintaining those valuable donor relationships. I am rooting for you!

I look forward to emailing you next week, which will give you those special tips on how to manage an intermediary, who may not be the donor or Trustee of the philanthropic institution themselves but instead is a program officer or consultant in charge of managing the donor funds. Since I often serve as such an intermediary, I have lots of thoughts on the subject so be sure to check our next week's email with my advice on the matter.

Until then, do good and be well.

A handwritten signature in cursive script that reads "Sybil Ackerman-Munson".

Best,
Sybil Ackerman-Munson,
President, Do Your Good LLC

Week #18

Oftentimes a wealthy individual or philanthropic institution will consult with a close advisor or hire staff to help with their giving strategies. These are called gatekeepers because they will often be the person you interact with to pitch your program, rather than with the donor themselves. I serve as a gatekeeper for quite a few donors and so I know what it means for a nonprofit leader to have a positive, trusting and fruitful relationship with a gatekeeper.

I've seen nonprofit leaders like you employ strategies that work super well. I've also seen them make mistakes... And I don't want this to be you.

The three most important tips to create a trusting relationship with a gatekeeper:

Tip #1

What to do: Treat the gatekeeper as your ally. The job of a gatekeeper is to find and fund nonprofits that fit the mission of the donor or philanthropic institution that they serve. Your success is their success.

What not to do: Do not treat the gatekeeper as your adversary. They are not your competition.

Tip #2

What to do: Treat the gatekeeper as an expert and colleague that is on your level. This is because a gatekeeper is usually an expert themselves. This means you want to really bring the gatekeeper into your world in a genuine manner.

What not to do: The information you offer the gatekeeper should align with what they are hearing elsewhere and from other experts and nonprofit organizations. If it appears you are disingenuous, talking down to the gatekeeper, or taking credit for the work of others, then you will lose credibility and it may even put you out of the running for a donation that you otherwise would have received.

What not to do: Do not treat the gatekeeper as your adversary. They are not your competition.

Tip #2

What to do: Treat the gatekeeper as an expert and colleague that is on your level. This is because a gatekeeper is usually an expert themselves. This means you want to really bring the gatekeeper into your world in a genuine manner.

What not to do: The information you offer the gatekeeper should align with what they are hearing elsewhere and from other experts and nonprofit organizations. If it appears you are disingenuous, talking down to the gatekeeper, or taking credit for the work of others, then you will lose credibility and it may even put you out of the running for a donation that you otherwise would have received.

Tip #3

What to do: Let the gatekeeper know early and before it goes public when you accomplish a major milestone - either good or bad. This includes any significant progress you make to overcome an obstacle and/or a major staffing transition or change in your strategic plan.

What not to do: Do not surprise the gatekeeper by either hiding important information that they then hear about from another source, and/or publicly announce a major material issue without a heads up prior.

I hope this helped you understand the top three tips to do in order to create a good relationship with a gatekeeper. In my next email, I will focus on the strategies to seek and find new donors or foundations that are aligned with your priorities, are not yet funding your work, but are great prospects.

Until then, do good and be well.



Best,
Sybil Ackerman-Munson,
President, Do Your Good LLC

Week #19

A lot of nonprofit leaders have asked me how to seek out and find new donor prospects. I therefore offer you some strategies that I've seen work well. I use these same tactics for my clients when they want to discover who else in the world is funding in the same issue area that they care about. I offer you the top four ideas that I've seen work the best below. And then I offer you a special note to consider, as well as a pitfall to avoid. Read on to learn more.

The typical things I see you all do to recruit new donors are your annual fundraising event where you encourage current supporters to recruit new people to sit at their table, you have online auctions, and you also organize educational webinars and outings that entice new prospective donors to give to your cause. I also noticed at least four additional top strategies I see the very best nonprofit leaders deploy in their search for new donors.

The list of four less known strategies to find new donors is listed below:

1. Check out the websites and annual reports of like minded organizations that you partner with and review their list of donors. Determine if any donors on their list are potential prospects for the work that you also do, and, if so, reach out to those donors.
2. Find out if there is a funder collaboration on the issue that you focus on. A lot of times the funder collaboration will list all of its member organizations. This will tell you which philanthropic institutions are invested in your work. You can reach out to those foundations. As an example, see the Environmental Grantmakers Association which lists all its members [here](#). Almost any issue out there has a funder collaboration like EGA working on the issue, track it down for the program your are working on.
3. Organize small coffees or house parties with your current donors. Ask your current donors to come to these gatherings with at least one friend that they also think could fund your organization. Make it clear that these gatherings will focus on the substance of what you do, but they will also be pitches to ask new donors to support your organization.
4. Be clear up front that one requirement as a Board member is for each year to bring in X number of new donors for Y amount each year (you choose amount).

Pitfalls to avoid:

Know your audience. Once you find the new prospect be sure to hone your message to the person you are talking with - for example, are they a campaigner, sustainer or launcher type of donor? The old saying "you only have one chance at a first impression" is true. To learn more about the similarities and differences between the three types of donors you can check out my free offering [here](#), or for a more tailored description and for you as a nonprofit leader, check out my paid mini-course on the subject, [here](#).

Additional consideration: If you are checking out a United States - based prospective donor, and if they have a family foundation, you can check out everyone they are funding via their 990s. This will help you determine if they are a good fit for what your are doing. Guidestar Charity Check offers this information in an easy to review format, see link [here](#).

I hope this email gave you some new ideas to track down new donors. In my next email, I will focus on convincing your favorite donors to be your advocate.

Until then, do good and be well.



Best,
Sybil Ackerman-Munson,
President, Do Your Good LLC

Week #20

I honestly get concerned when I hear from nonprofit leaders that they want a donor to give multi-year funding and then to leave them alone. While I do understand the desire not to allow a donor to micromanage, I worry you are leaving money and opportunity on the table that could otherwise be used to benefit your cause. I believe that there are certain situations when it does make sense to encourage a donor to be more engaged in your work than to simply leave you money each year, and instead to be an advocate on your behalf. If done right, the benefits can be quite fruitful. The reason is some donors and/or their program officers or advisors circulate in worlds that you as the nonprofit leader are unable to access in the same way - just like the donors can't always access the worlds you are in like you do so successfully. Therefore, by activating a donor to be your advocate, you can open whole new worlds of people and organizations to your cause.

The best way to transform a donor into your advocate is to get them directly involved in a campaign with a clear timeline, benchmarks and goal. Any time you decide to work on a campaign this is the time to turn all your supporters into advocates and to bring even more supporters into your network.

The three best ways to convince a donor to become an advocate are:

1. Engage the donor in creating campaign strategy - Ask a donor to fund a third party facilitator to work with you and other nonprofits to create a campaign plan. This means the donor themselves won't be in the decision-room but they will still feel invested and part of the team. Then, once an agreement on strategy and a campaign plan is locked into place, you will find that the donor is likely to take the extra step and helps you pitch the campaign to their friends and colleagues.
2. When a major media push is necessary to get your message out to the public - Ask a donor to help you fund an amped up media push with a clear timeline and goal. You will then find that the donor is likely to promote this work with other donors. The nice thing about this strategy is the materials have the added benefit of looking really professional and convincing, since they are connected to a media push.
3. When you have a major capital campaign - It's always nice to engage donors in helping you build important infrastructure that will last for generations. Bring the donors into the strategy early and offer them naming rights (if they care about that sort of thing). Create a special program that easily allows the engaged donor to ask their friends and colleagues to also support the campaign, such as a donation of a certain size that puts a donor's name on a brick that is a part of the structure.

Pitfalls to avoid:

I see all too often a mistake made by nonprofit leaders who are embarking upon a major campaign. They do not engage their donors early in the campaign as partners and instead still treat them like they should simply sustain the work year after year. They approach the fundraising like it's limited, when instead a campaign can get donors to give you more money than they usually do if they are inspired by the project. When you approach a campaign like a zero sum game then you lose the opportunity to inspire and bring in a large number of new donors to your cause.

I hope this email gave you some new ideas to turn your favorite donors into advocates. In my next email, I will focus on how to give a donor bad news without losing them as your supporter.

Until then, do good and be well.

A handwritten signature in cursive script that reads "Sybil Ackerman-Munson".

Best,
Sybil Ackerman-Munson,
President, Do Your Good LLC

Week #21

It's not always rainbows and roses. If you are like most people, however, you feel like you need to show a positive story to the people who give you money in support of your organization. While it is true you need to present a sophisticated and strong organization in order to raise money, it's also ok to show a donor your warts and all the challenges that accompany running a nonprofit organization. It's better to talk about challenges with a donor because it makes you real to them. It could even make a donor even more committed to your work in the long run because they then feel a part of the good, bad and ugly - not just the good.

To put this conversation into context, imagine if a friend of yours only told you everything they were doing that was happy and good and they never confided in you about their darker days or asked you for advice? Would you like that person? Would you feel like you knew that person? Would you advocate for that person? The answer is probably that you would not feel a person is a real friend if they only showed you the good and never confided in you. Treat a donor as you would a friend in this situation.

While I am focusing on how important it is to bring a donor into your challenges. There is a correct strategy to how you do this because the wrong strategy could end up disillusioning the donor and you could lose them - so proceed with care and use my three top tips below:

Tip #1:

Foresight: It's best to bring the donor into the dilemma before it becomes public. You can usually foresee a challenge before it becomes a big deal and it's early on when you should bring the donor into the dilemma. If they have to ask you about it - you may have lost them.

Tip #2:

Transparency: Do not think you can hide a problem or challenge from a donor. Be transparent, even if it is awkward or you have others at the organization asking you to keep it secret. It's much worse for a donor to find out later - and chances are they will even if it does not come directly from your organization.

Tip #3:

Don't sugar coat it: If you are dealing with a challenge it is so much better to own up to it than to try and minimize or explain it away. Own up to the problem and then be solution-oriented with the donor to see if they have helpful advice on how to tackle the problem.

I hope this email gave you some new ideas about how to give donors bad news without losing their support. In my next email, I will focus on how to navigate a major staffing transition at your organization without losing the long time support of donors who were connected to the departing staffer.

Until then, do good and be well.

A handwritten signature in cursive script that reads "Sybil Ackerman-Munson".

Best,
Sybil Ackerman-Munson,
President, Do Your Good LLC

Week #22

It's inevitable that staff will turnover at your organization. When they do it's never easy on a lot of levels. If that person who is leaving was beloved by major donors the transition can become even more challenging because major funding and support is also potentially lost. This is true if the staffer was the Executive Director or a Program Officer in charge of a major campaign that required significant fundraising. This challenge can be particularly poignant at a smaller nonprofit, which is oftentimes defined by its charismatic leaders, but can be an issue with and size organization.

I've seen these transitions go so badly that the nonprofit all of a sudden sees a huge decrease in funding support almost overnight, and they fail to even grasp what is going on. I don't want this to be you.

I offer you tips to consider when a major charismatic leader at your organization is planning to leave. These tips are both for the leader who is leaving (if they care about the future well-being of the organization they are leaving) and for those staying behind to keep their organization going strong.

1. Long timeline - The best transitions are well-planned and the staff does not actually leave until the steps are put into place to hire their replacement seamlessly
2. Strong Board and Executive Director - If the Executive Director is leaving then the Board gets involved early and they write a formal letter laying out the process to find a new Executive Director. The Board Chair personally calls and emails the organizations major donors that are especially connected to the transitioning Executive Director. If it is a charismatic staffer that is leaving then the Executive Director works with that staffer to personally reach out to any donor that is especially enamored with the staffer to let them know the next steps together.
3. If a sudden transition - If the staffing transition is sudden because the person needed to be fired, or the staffer had a family emergency or health situation, then tips number 1 and 2 may not apply. However, you still can move quickly to identify the top donors who had a relationship with the quickly departing staffer to let them know the next steps and how the program that the donor cares about will continue. It is trickier to do this without the help of the departing staffer but if you do it quickly and if your organization itself is strong and clearly focused on the mission that the donor cares about you should be ok.

The most important thing to remember is to keep track of how donors are interacting with your organization overall. It's probably good practice to ensure that more than one staffer at your organization is connected to each of your major donors that you care about. That way even if there is a transition in one staffer the donor is connected more broadly to your organization overall. This happens more often than you'd think - that only one staffer is allowed to talk with a certain donor and when that staffer leaves the organization then loses a significant source of support for a major program that actually goes way beyond that one individual staffer.

I hope this email gave you some new ideas about how to navigate a major staffing transition at your organization without losing the long time support of donors who were connected to the departing staffer. In my next email, I will focus on how to help a donor support you in expanding diversity, equity and inclusion in all the work that you do.

Until then, do good and be well.

A handwritten signature in cursive script that reads "Sybil Ackerman-Munson".

Best,
Sybil Ackerman-Munson,
President, Do Your Good LLC

Week #23

It's important to many donors that you embrace equity, diversity and inclusion (EDI). I am sure you agree that it is also a good all around practice to be as inclusive as possible in all the work you do, both internally within your nonprofit structure and with your externally facing programs.

As a white woman, I want to be clear I am not an official trainer in EDI. There are many good people with lived experiences who offer their services exclusively in this arena to help a nonprofit like yours embrace EDI, and I recommend that you seek them out. However, I wanted to acknowledge in my newsletter that EDI is a critically important part of all work that a nonprofit does. I don't want to ignore its importance, while also honoring the true experts in this field who are available to you and can offer great advice. If you want to get pointed in the right direction, I am impressed with the advice from the Nonprofit Learning Lab, see <https://www.nonprofitlearninglab.org/dei>.

Given my disclaimer, I do want to offer you four considerations about EDI and fundraising based on my many years of experience working for donors and what they have considered related to EDI in their giving strategies to nonprofits like yours.

Considerations:

1. Are your Board and staff diverse and represent the constituencies that you represent so that your organization can truly understand how to support the people you want to serve?
2. Does your organization have genuine and deep relationships/partnerships with people and organizations that represent diverse lived experiences?
3. Do you have a process to resolve disagreements over policy direction or disputes that honors diverse perspectives and creates a healthy atmosphere of listening, learning and incorporating ideas?
4. Are you honest about any challenges your organization is having related to EDI, and in explaining how you plan to work through the challenges?

Of possible interest - if you work in environment and natural resources: I often work for clients who focus on environment and natural resources issues. In that role, I have often referred to Green 2.0 as a go-to source of information to determine how aligned a certain nonprofit is with EDI goals and strategies, [see link here](#).

I do hope that my four considerations help you think carefully about how you discuss EDI with current and prospective donors. In my next email, I will summarize all we learned over the past six months and talk about next steps so that you can continue to hone your skills to be the best fundraiser you can be.

Until then, do good and be well.

A handwritten signature in black ink that reads "Sybil Ackerman-Munson". The signature is written in a cursive, flowing style.

Best,
Sybil Ackerman-Munson,
President, Do Your Good LLC