



# Using the 5 Ws to Elevate Your Fundraising

CAP Summit – October 16, 2015

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# + Overview: The 5 Ws

- **WHO** should receive your fundraising appeal?
- **WHAT** message should they hear?
- **WHERE** should the message come from?
- **WHEN** should they receive the message?
- **WHY** should you tailor the message?
  - *To move donors up the pyramid towards a large or planned gift.*
  - *To fulfill your mission!*

# + The Donor Pyramid



# + Common Fundraising Mistakes Non-Profits Make

- Who (Segmentation)
  - Treating all individuals the same
- What (Content)
  - Neglecting engaging content
  - Not asking for more money
  - ...Not even asking at all!
- Where (Method)
  - Not integrating your different channels
  - Missing a coherent voice
- When (Calendar)
  - Mailing too infrequently
  - Not mailing at the best giving time of the year: year-end/holiday season

# + Discussion Questions

- How do you want your donors to think of your organization?
- To what degree have you attracted new donors and new ideas to your organization and board?
- Who are your main competitors and how do your results in recent years compare to theirs?
- How are you collaborating with similar organizations on a local, regional, or national level?
- What is the key take-away from all of these?
  - *Relationships are your foundation to success!*

# + Segmentation: Define your audience

## ■ Donors

- Alumni
- Current
- Lapsed

## ■ Non-Donor

- Event Donors, but non-DM donors
- Outside Lists

## ■ Demographics

- Age
- Geography
- Gender

## ■ Class Year

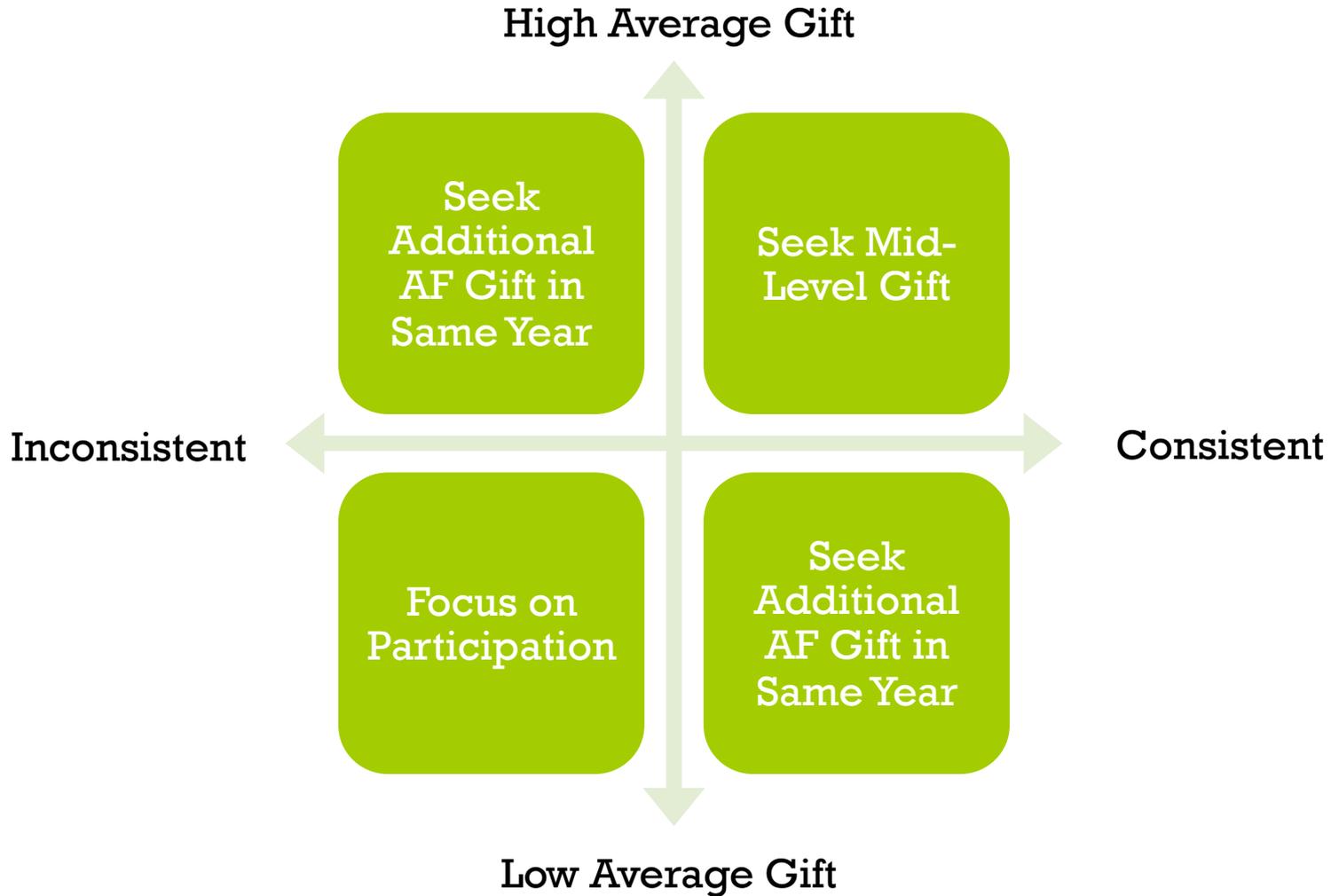
- Reunion vs. Non-reunion



# Segmentation: The How-To

- Ensure your codes have adequate information embedded in them.
  
- Solicitation Code Matrix
  - Method (Direct Mail Appeal, Online, Newsletter, etc.)
  - Timing (Month, Year)
  - Donor History (Last Gift Date, Last Gift Amount)
    - 0-12 months, 13-24 months, etc.
    - <\$25, \$25-\$49.99, \$50-99.99, etc.

# + Segmentation: What to do?





# Focusing on the Pyramid: Low-Dollar Donors

- Depending on what segment your donors fall into, your goal for them will be different.
- Those who give small gifts infrequently: There are special tactics you can use to get them to give more frequently to help your retention.
- Those who give small gifts frequently: Try to convert them to monthly donors.

# + Focusing on the Pyramid: Mid-Level Giving

- Based on your data, what is your threshold for mid-level giving? For some organizations, it is \$5,000. For others, \$100. It all depends on your range of gifts and staff availability.
- What are the characteristics of people who have significantly increased their giving? Have they made multiple gifts in one calendar year? Who else in your database has the same characteristics?
- Create giving circles as an incentive for donors to upgrade their giving.
- How should you steward these individuals toward an eventual planned gift?
  - Phone calls
  - Handwritten notes
  - Invitations to events
  - Newsletters



# Segmentation: Ask String

“I wish my Catholic elementary school in the Bronx was still open,” said Mr. Philbin. “I had a great time visiting after I returned to New York in the 80s – made me proud to see those students sitting in the same classroom as I did. Getting a great education and learning the same important values. Unfortunately it’s one of those that have already been closed and that’s why we need to take some action right now. It’s not too late. **Your support will keep the Catholic elementary school strong and alive. We can do this.**”

Your alma mater depends on you. Please make a gift of \$<ask 1>, \$<ask 2>, or \$<ask 3> no y. (over, please)

<Website>

## 2015 HOMECOMING GIFT



**YES!** In the spirit of homecoming, I want to share a gift with the <Complete School Name> knowing it will give students a rigorous and faith-based education.

\$Gift Ask 1     \$Gift Ask 2     \$Gift Ask 3     Other \$\_\_\_\_\_

### Payment Method:

- Check enclosed payable to: CAP-<Current School>
- I'd like to make a gift by credit card:
  - VISA    MasterCard    American Express

Please update my information as indicated below:

[Primary Addressee]  
 [Org\_Name] (if any)  
 [Delivery address]  
 [Address 1] (if any)  
 [Address 2] (if any)  
 [City], [State] [Zip]-[Zip+4]  
 [Country] (if not USA)

CARD NUMBER \_\_\_\_\_

EXP. DATE (MO/YR) \_\_\_\_\_ CID/CCW# \_\_\_\_\_

NAME (AS IT APPEARS ON THE CARD) \_\_\_\_\_

SIGNATURE \_\_\_\_\_ DATE \_\_\_\_\_

EMAIL ADDRESS This is for internal use only. We will never sell, exchange, or lend your e-mail address to any outside parties.

- I did not attend this school.     Please remove me from future mailings.

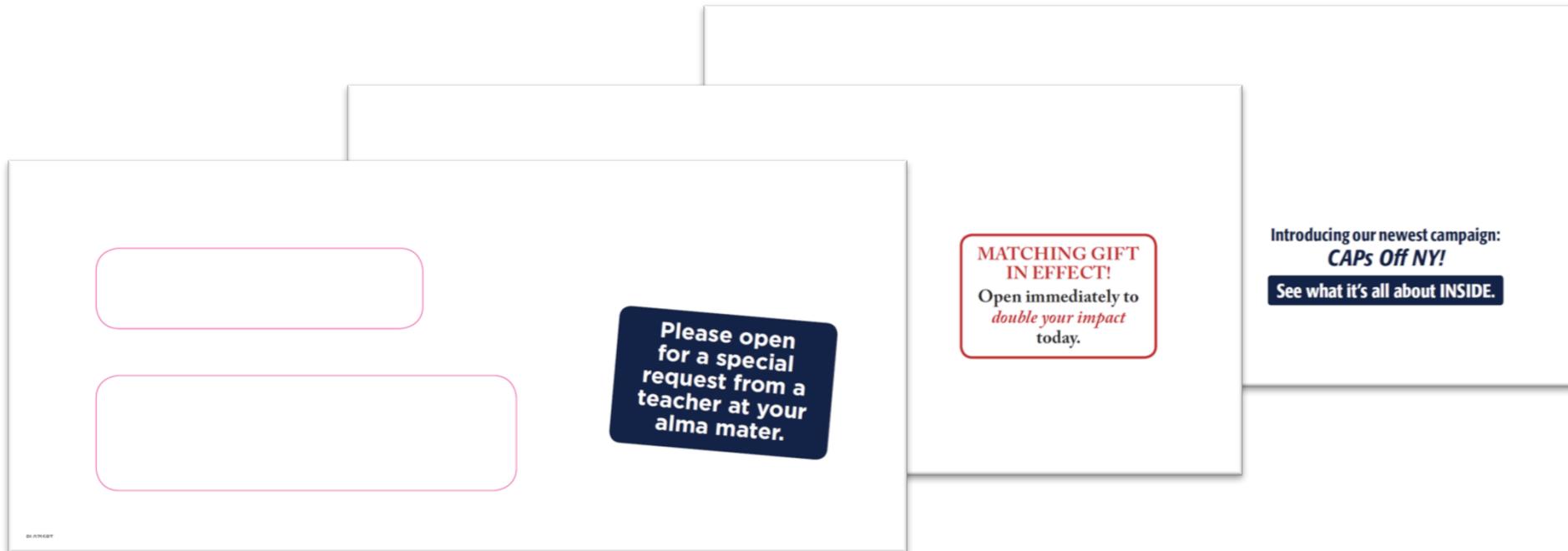
*100% of your tax-deductible donation goes directly back to the school!*

# + Content: Do's and Don'ts

- What do donors respond well to?
  - Emotional stories about students.
  - Acknowledgment that their support is helping change lives.
  - Compelling statistics followed by a name and face who represents the numbers.
  - One consistent voice over time; the same signer starts to build a relationship with the donor.
- What do donors not want to hear?
  - You are operating at a deficit and need “saving”.
  - You are doing so well – they will think you don't need their money.
  - Negative information about competitors.

# + Content: The Envelope

- The Outer Envelope (OE) is the most important part of the package.
  - Donors need to be intrigued and motivated to open the appeal. They will take less than 25 seconds to decide if they are going to do so.
  - A higher open rate leads to a higher response rate.



# + Content: The Letter

- Create suspense
  - Problem: Show how problem is in the way of your school reaching a goal.
  - Conflict: Introduce some difficulties the donor can help resolve.
  - Goal: Explain your ambition and desired result.
- Hook the reader with a story so they continue reading to see how things turn out.
  - *This is a great way to highlight a student.*
  - *A story introduces emotion to the mailing – and emotion is a key fundraising motivator.*
- Make Your Constituents Insiders
  - Tell them how the money was used last year.
  - Inform them of your annual fund goals for this year.
- Catholic Alumni Partnership-specific
  - Last year we tested different themes: education vs. religion, principal vs. teacher, alumni vs. student.
  - Results: Donors care most about students' access to education.

# + Content: Even More Do's

- Once you find a brand voice that you use consistently for all of your content, potential supporters will understand your organization better, will come to trust your organization, and will be able to recognize your work at first glance.
- Expressing a cohesive, distinct character is key to creating deeper connections with your supporters.
  - Having a mission donors believe in is central.
  - They don't only want a promise, they want a plan.
  - Stand out from the competition by showing your process.
  - Listen to your constituents and be transparent.
  - Make a memorable impression by forming an emotional connection.
  - Educate through your elevator pitch.

# + Segmentation and Content Together: Lapsed Donors

**YES**, I would like to renew my support, improve Corpus Christi School and show my solidarity as o the part of the community. Please have the anonymous donor match my gift of:

\$225 so it becomes \$450

\$285 so it becomes \$570

\$340 so it becomes \$680

Other \$ \_\_\_\_\_ which will also double!

Your past support has given us the ability to provide a high quality experience for our students at Corpus Christi. Helping the next generation develop their character and a love of learning coupled with providing a safe, secure and supportive environment is so important to us. We can help turn children's lives around - giving them a confident future - with deep immersion.

But, we humbly admit that we can't do this by ourselves.

This is why I'm asking you today, someone who believes in the significance of a Catholic education, will you please rejoin us in our efforts? Our parents make the choice to send their student to Catholic school because they believe that investing in the spiritual and intellectual development of their child is worth it.

At Corpus Christi we help our parents by providing a top notch competitive education while keeping the tuition attainable. Also, we strive to assist our parents who need financial aid in order to educate their child in Catholic school. We affect their quality of life for the better. But in order to continue changing lives we need you!

Please renew your valued support by sending in a gift to Corpus Christi today! Your cherished gift will help us provide financial assistance to more students. Together we can make a deeper impact on the future generations of New York, who are ready to follow in your footsteps. Let's continue to help students thrive and assist parents in providing a better life for their children.

# + Segmentation and Content Together: Prospective Donors

<Salutation>, I'm asking you today to give back. Please consider making a gift so that another student may follow in your footsteps and enjoy <Current School>.

The children you help may come from low-income families who cannot afford Catholic school tuition. It would be a shame if they were not educated. They may be the next leaders in education, medicine, or business.

By joining our donor family, you will

By joining with your fellow alumni, your support of <<Current School>> will help us continue to provide students with a positive school experience. Sooner than they know it, they will be forging into the future having learned valuable lessons from <<Current School>>. Help them find a successful future in their life's path by making gift of \$35, \$50 or more today.

Cardinal Dolan speaks so highly of the Catholic school system and I am so thankful for his praise. In these last three years he has been quite vocal about something we here at <<Complete School Name>>, and you as a proud alumna/us, have known all along: Catholic education is extremely valuable, beyond the dollars and cents.

Please stand alongside Cardinal Dolan in supporting our safe and academically excellent Catholic schools. Your gift today will help sustain <<Complete School Name>> and build bright futures for hardworking students.

*(over, please)*

<<Website>>

RECYCLED PAPER NP0115

<<Logo\_ File\_1>>

YES! I will join Cardinal Dolan in supporting safe and academically excellent Catholic Schools. I will show my pride and love for <<Current School>> during National Catholic Schools Week with a gift of:

\$35  \$50  \$75  Other \$ \_\_\_\_\_

Payment Method:

# + Method: The Relationship Between Channels

- We recommend most of our clients follow a mail package with a correlated takeover box for their website. Scheduling it to pop up around the time the mailing hits homes will triple the impact of your messaging.
- When supporters read their email or direct mail piece, many will visit your organization's website for more information. Having a pop up box requesting they sign up for more information or donate online will give you the chance to secure their email address and possibly convert them to an online donor.
- Plus, this allows non-donors and new supporters to learn about your campaign without even receiving your direct mail piece.

# + Method: Five Ways to Integrate Online and Direct Mail

- Push the option to respond online in direct mail pieces.
- Cross-cultivate donors as much as possible with e-mail, snail mail, retargeting ad campaigns, and social media posts.
- Innovate ways to capture all contact information for each donor—mailing address, e-mail address, mobile numbers.
- Promote traditional direct mail tactics—premiums, planned giving promotion, gift matches—to the virtual space.
- Use virtual cues in direct mail—providing social media links, designing packages with a more “window” like feel.

# + Example: CAPs Off NY



Dear Samantha,

Pope Francis will soon be here! It's the perfect time to join St. Luke, as part of the Catholic Alumni Partnership (CAP), in the *CAPS Off NY* Campaign.

St. Luke will join the other schools in the Archdiocese of New York to celebrate and support Catholic education. We'll be helping students who cannot afford Catholic school tuition receive the same St. Luke education that you did.

You're a living example of the wonderful way in which Catholic school prepares a person for life. You're a unique individual with positive values and a strong conscience.

[So, I'm asking you to give back today.](#)

With your support, St. Luke will continue to be an alma mater of which you can be proud. Please show your pride for St. Luke by participating in the *CAPS Off NY* campaign. [Invest in a child's future with your new gift now.](#)

Thank you!

Ms. Tracey Coleman  
Principal

[DONATE NOW](#)

Dear Ms. Coutain,

Soon Pope Francis will be here, generating excitement for Catholics of all ages, just as the first few weeks of school generate excitement for the young students at Ascension.

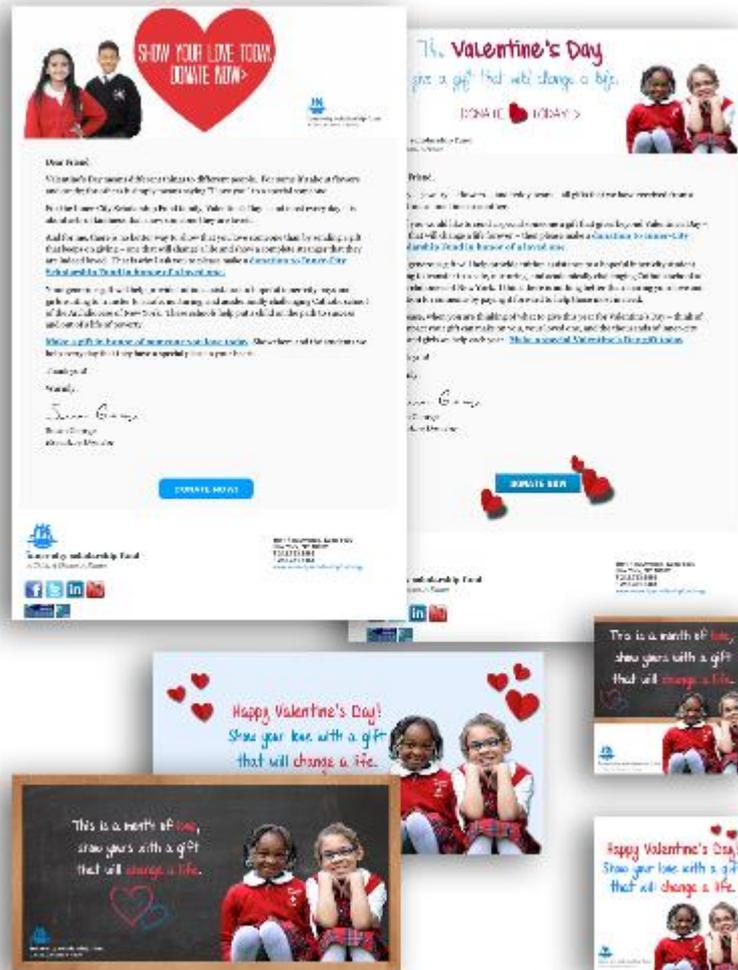
With this sentiment all around, Ascension, as part of the Catholic Alumni Partnership (CAP), is eagerly participating in the launch of a new campaign: *CAPS Off NY*.

CAP is rallying alumni and current students throughout the 47 participating schools in the Archdiocese of New York to come together to celebrate and support each other. Regardless of differing alma maters, we all have one thing to rejoice in: Catholic education.

It is the perfect time to say "*CAPS Off NY!*" to all who have played a role in educating our scholars in the religious tradition...including donors like you.

In talking with alumni, most wouldn't trade their elementary years at Ascension for the world. They credit much of their success in life, as well as their happiness, to the formative years spent in a Catholic school setting.

# + Example: Inner-City Scholarship Fund



# + When: Mail Schedule

- Donors should be mailed a *minimum* of three times per year. This allows them to give to your organization when is best for them, not just when is best for you. Making them feel comfortable is of utmost importance.
- For CAP-NY, the schedule is based around the Cardinal's Appeal for the ADNY. This is to avoid cannibalizing efforts.
- To integrate with current events, we mention what is happening both at the individual schools as well as around the country.
- Sample calendar:
  - September: CAPs Off NY
  - October: Homecoming
  - December: Christmas
  - January: National Catholic Schools Week
  - May: Thank-a-Nun Day
  - June: Graduation
- By having a varied mail schedule as well as using multiple channels, your chances for success skyrocket because people can give *when* they want, *how* they want.

# + Audience, Content and Method or *Who, What and Where* Examples

- Planned Giving Postcard – older alumni
- Newsletter – high dollar donors
- “Join us” language – prospective donors
- “We miss you” language – lapsed donors
- “Welcome back” language – reinstated donors

# + Focusing on the Pyramid: Planned Giving

- Planned Giving can easily be marketed in materials you are already producing:
  - Newsletter
  - Acknowledgment
  - Buckslip in a mailing
  - Reply card in a mailing
- Make sure to include a personal contact for these donors. Planned Giving can be intimidating so having a name to reach out to with questions can help.
- As Planned Giving donors are older, make sure to segment appropriately and use your resources wisely!



# Planned Giving Postcard



CATHOLIC SCHOOLS  
of the  
ARCHDIOCESE  
of NEW YORK  
Catholic Alumni Partnership  
1011 First Avenue, 18th Floor  
New York, NY 10022

[OnAdrSel\_Address]  
[Org Name] (if any)  
[Delivery Address]  
[Address 1] (if any)  
[Address 2] (if any)  
[City], [State] [Zip]+[Zip+4]  
[Country] (if not USA)



50 years from now, how do you  
want to be remembered?



Ensure Your Legacy  
through  
**PLANNED  
GIVING**  
To Your Alma Mater



The Regina Coeli Legacy Society (The Society) of the Archdiocese of New York honors and acknowledges individuals who have made plans for their alma mater through a bequest. A charitable bequest is one of the easiest ways you can leave a lasting impact. Members of The Society know their gifts preserve and strengthen the spiritual character of our Catholic community.

You can make a lasting difference to the lives of Catholic school students by leaving a planned gift to your Catholic elementary school. Your gift will help future generations of those attending your alma mater—while simultaneously providing benefits for you and your family.

Members of The Society are invited to an annual Special Mass at the Cathedral of St. Patrick followed by a private reception, and their names are listed in a special announcement published in a December issue of *Catholic New York*.

For more information on Planned Giving, please contact Jackie Comesanas, Director of Gift Planning, at 646-794-3316 or [gift.planning@archny.org](mailto:gift.planning@archny.org).

## 5 Reasons to Leave a Planned Gift

1. Allows you to receive immediate tax benefits
2. Offers you a say in how the funds will be used
3. Does not have to affect your current financial situation
4. Gives you numerous donation options
5. Lets you have a lasting impact on a cause

If you would like to make an immediate gift, please visit [www.adnycap.org](http://www.adnycap.org) and click on the "Support My Alma Mater" tab. Thank you!



# + Planned Giving Newsletter



## PLANNED GIVING, PROFOUND GRATITUDE



**Meet Micaela**, a junior at Aquinas High School in the Bronx who earns all A's and B's, is active in the book club and pro-life club, and plans on pursuing a pre-med track in college.

Micaela lives with her sister and her mother, who isn't able to work because Micaela's sister is mentally disabled and requires constant care. The household budget is very tight. Micaela knows she would not be receiving a Catholic education if not for the generosity and foresight of a donor she will never meet — a donor who participated in planned giving, naming Inner-City Scholarship Fund in her will and, in the process, establishing an ongoing scholarship.

"I'm so grateful for my scholarship to Aquinas because I love the small and supportive community we have here," says Micaela. "I feel like this is my second home. I'm learning from teachers who really care. I hope the teachers are like this in college!"

Having previously attended public school, Micaela knows that she is now getting more than just a top-notch education. "In a Catholic school, you get to learn about yourself as a person because faith and religion are part of the school experience," she says. "I don't think my faith life would be as strong if I were still going to public school."

Asked if she has any wishes related to being on the receiving end of a life-changing planned gift, Micaela doesn't hesitate. "I wish I could have personally thanked the compassionate lady who funded my scholarship," she says. "This person has given me and my family so much help, and she is making so much possible for my future. Someday I want to do something equally helpful for someone else."

*\*Name has been changed to protect the privacy of our student and her family.*

**Change a child's life by making a planned gift to Inner-City Scholarship Fund. Thank you!**

## 5 Reasons to Make a Planned Gift to Inner-City Scholarship Fund

1. You will enjoy the satisfaction that comes with helping disadvantaged children and teens receive a life-changing education in the Catholic schools of the Archdiocese of New York.
2. You will find peace of mind in the knowledge that, when you are gone, you will have left behind a legacy of philanthropic support.
3. You can use planned giving to avoid estate and gift taxes that might otherwise apply after you are gone.
4. You may begin receiving investment income for life.
5. You will likely see substantial tax advantages.

## Did You Know?

Establishing an endowment is a wonderful opportunity to make an investment in the future of Inner-City Scholarship Fund and the children it serves, making a tangible impact in perpetuity. Endowment funds may be unrestricted to enhance Inner-City Scholarship Fund's programs and operations or designated specifically toward named scholarship funds.



inner-city scholarship fund  
A Child. A Chance. A Future.

1011 First Avenue, Suite 1400  
New York, NY 10022  
212.753.8583

[www.icssf-nyc.org](http://www.icssf-nyc.org)



inner-city scholarship fund  
A Child. A Chance. A Future.



[www.icssf-nyc.org](http://www.icssf-nyc.org)

## Inner-City Scholarship Fund Planned Giving: Everybody Wins Ed and Nancy Share Their Story



**For Ed McDermott and Nancy Stein** of New York City and Long Island, planned giving with Inner-City Scholarship Fund was a "perfect proposition."

Ed is a semi-retired publishing professional. Nancy is a former dictionary editor, conservation framer and art dealer. Both appreciate the transformative power of education — and they were already involved with Inner-City Scholarship Fund when the idea of planned giving sparked their interest.

"We felt like we really wanted to share what we have, and we were open to doing more with Inner-City Scholarship Fund," recalls Nancy.

"And they do pay us interest, some of it tax-free," adds Ed, also known as Mac. "Our gift of an annuity gives a very decent return. So, for us, planned giving with Inner-City Scholarship Fund is a sound

financial decision as well as an investment in education for children who need a hand. Everybody wins."

When they signed on for planned giving, the McDermotts were sponsoring two students through Inner-City Scholarship

Fund. They saw planned giving as a chance to do even more for inner-city children who wished for a chance to attend Catholic school.

### The Long View

Asked about the couple's initial involvement with Inner-City Scholarship Fund, Mac explains that Catholic institutions provided his entire education. Supporting Inner-City Scholarship Fund, he says, has proven a great way to "give back for all I've received."

"New York's Catholic school system has been there for immigrants, working class and poor people for a long, long time," he points out. "We regularly contribute to a number of charities. We try to help as many as we can, but Inner-City Scholarship Fund is at the very, very top of our list."

For her part, Nancy notes that the schools of the Archdiocese of New York are among the best

schools anywhere. "They produced Mac, didn't they?" she says with a gentle smile in her voice. "Unlike Mac, I'm not Catholic; I'm Jewish," she adds. "But I don't know how anyone could not be impressed by that 98% high-school graduation rate. That kind of educational success in New York City's poorest neighborhoods — it's just remarkable."

Grandparents of five, Nancy and Mac draw much satisfaction from being able to give a planned gift — which, by design, will "keep on giving" even after they're gone. "Things won't be getting appreciably better in the inner-city any time soon," says Nancy. Mac concurs. "There will be new generations of kids reaching the hand we've been lending through Inner-City Scholarship Fund," he says, "for years and years to come."

### INSIDE THIS ISSUE

Name Inner-City Scholarship Fund in your will — it's simple! .....Page 2

From The Desk of Our Executive Director.....Page 2

Planned Giving Q & A.....Page 3

5 Reasons to Make a Planned Gift to Inner-City Scholarship Fund .....Page 4

Planned Giving, Profound Gratitude .....Page 4



Thank you!