

Upgrading: What, Why and How?

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**Sponsored by the Nonprofit Support
Program at the Hartford Foundation**

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Upgrading: Why, How, and How Often?

In this webinar, you will learn:

- What upgrading means
- Who is a prospect for an “upgrade”
- Several upgrading methods

You will leave with:

- The questions you ask, answered
- A plan for implementing an upgrading strategy starting right away

Check In and Review

Progress you are proud of?



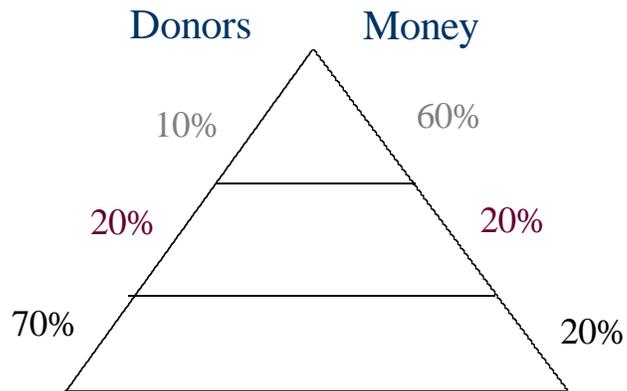
Challenges you are facing?



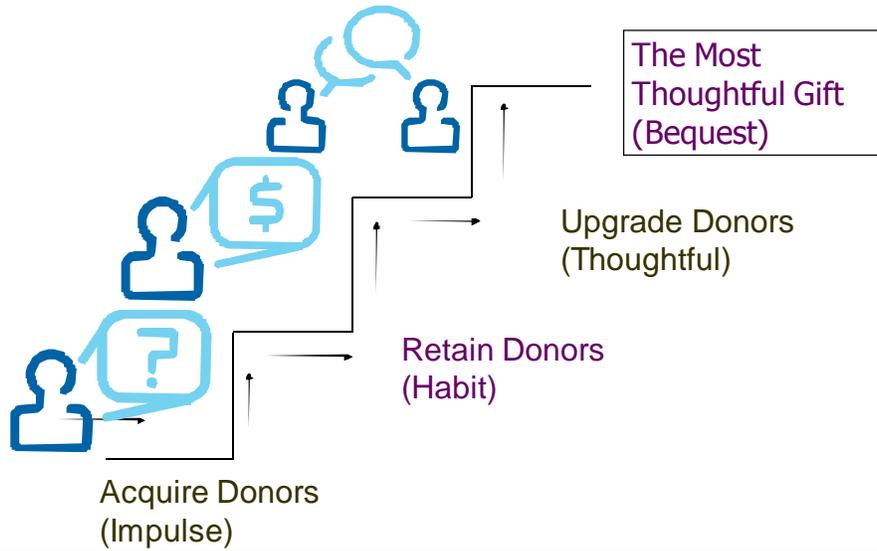
Remember:

USE YOUR CONSULTING HOURS

Donor Pyramid



The Purpose of Fundraising is to Build Relationships



The Focus of Upgrading



“This is one of the organizations I support”

“I like this organization a lot”



“This is one of my top three giving priorities”



Assumptions about Upgrading

- Almost everyone can give more
- We don't know who will or can until we ask
- Even people who don't increase their giving become more thoughtful about their current giving
- Not asking for an upgrade will cause some donors to stop giving altogether



Who Should be Asked?

Any donor who has:

- ✓ Given 3-4 times
- ✓ Given for the past 2-3 years consistently
- ✓ Given larger than usual gifts (\$50-\$250)
- ✓ Given odd amounts (\$65.34, \$91, \$73)





Who should be asked?

Donors who:

- ✓ Are known to someone in your organization who thinks this donor could give more
- ✓ Have shown interest in a particular program, sometimes by making a larger gift to that appeal
- ✓ Are major donors to a similar organization



Upgrading Methods

Donors who have given under \$100 3-4 times or for 2-3 years:

Invite to join a “Monthly Donor” program:

Sustainer Circle

Guardians of Liberty (ACLU)

Humane Hero (Humane Society of the US)

Hope Builders (Habitat for Humanity)

Elements of Monthly Donor Programs

- Must be able to accept credit cards and direct debit
- Must be on your website
- Donors should be profiled every so often in your newsletter
- Should have 1-2 rewards for joining:
card, special event, special report, mug

Language for Monthly Donor Letter

- These monthly gifts are invaluable to help keep us our commitment to not turn anyone away who needs our help,
- to expanded grassroots mobilization,
- To working with other nonprofits to address the root cause of
- To being a reliable presence in a very uncertain world

Approaching Donors Personally

For donors already giving \$250 or more, consider a more personal approach.

Ask them to double their gift or possibly, ask for a more substantial increase

Use a combination of letter/e-mail, phone call and face to face meeting



Letter or e-mail to donor you know

Dear Terry and Chris,

I hope you saw the news story about our job training and counseling center expansion to three sites! Now everyone in our city lives within two miles of a center. Your ongoing and very generous support is definitely a big part of our ability to open these new centers.

The challenge now is to keep the centers fully staffed: we are overwhelmed with people coming in and needing to talk with someone. We have 200 volunteers, but they need coordination and training.

We need to raise an extra \$50,000 this year to keep up with the demand.

As a member of the board, I have given an extra \$1,000 to the organization, and have committed myself to raise \$5,000.

Would you two be open to talking about increasing your gift this year? I'd like to talk with you about the program, and get some feedback on the strategy we are using as well as more personally ask you to become a bigger part of our organization.

I will call you in a few days to see when we can get together.

Best wishes,
Susanna

Letter or e-mail to prospect you don't know

Dear Ms. Peters,

You have been a faithful and generous donor to our work for educational equity for the past several years. Let me say again how much we appreciate your commitment and your generous financial support.

As you may know from reading our newsletter, we are embarking on an ambitious campaign to expand our work into four more counties. We will start with our town hall meetings which encourage people to discuss the thorny questions of the costs of public education. We find that these meetings are a chance to clear up a lot of misconceptions, but more important to explore what it means to provide quality public education to a diverse population.

From these meetings, we hope to form at least three more chapters of Quality Education for Everyone, which will allow us to work in at least 20 more public schools.

I'd like to make a time to talk with you to discuss whether you could consider increasing your donation this year to help us with that expansion. Although we don't know each other, I think we have in common a deep commitment to making our public schools the best they can be for ALL the students. I would very much enjoy meeting you, if you have time. I'll call you in the next few days to see if we can find a mutually convenient time to get together.

Becky Morrison, Board member

becky@email.org

Respond to a Challenge

Find a donor or foundation to offer a challenge gift:
\$1 for \$1 for every new and upgraded gift.

If you go from \$50 to \$100, you will help us raise an extra \$50.



Follow up calls are key

Donors have a lot going on in their lives, and they put down your letter or they delete your e-mail.

Forgetting about your organization is not “no.”



Preparing for the Phone Call

Have ready:

- Opening sentence*
- Message for VM*
- Most exciting thing about the project*
- Where are you toward the goal?*
- How much do you want?*



- **Stop and THINK:**
- **Who is this donor?**
- **What are you interrupting?**
- **Are you prepared to hear yes? No?**
- **Questions?**

Some people you will want to meet:

For upgrade requests which would take the donor over \$1,000, it is best to meet in person, if possible.



Prepare for the Meeting



Have ready:

- ✓ *Stories*
- ✓ *Statistics, including comparisons*
- ✓ *Philosophical reasons why this is important*
- ✓ *Responses to common objections and questions*
- ✓ *Budget and fundraising success so far*

Keep in mind:

- *The donor/s agreed to see you*
- *They already like your organization*
- *Appreciate what they have done already, and reassure them it is enough*
- *Invite them to stretch and do more*

The CLOSE: Ask, wait for answer, be thankful



Upgrading Creates Thoughtful Givers

- ✓ If a donor agrees to give more, your organization agrees to give him or her more attention
- ✓ You will need to be thoughtful in return:
 - Personal notes on letters
 - Occasional phone call
 - Requests for advice or time

A Donor is NOT an



Plan ahead



Ways to maintain these relationships:

- ✓ Give board members a portfolio of donors
- ✓ Keep very good records on what the donor likes and doesn't, what she or he is most interested in, who is the best contact
- ✓ Ask donors to help you find donors
- ✓ Don't promise on the front end what you can't deliver on the back end

My Upgrading Plan

Homework by April 7:

1. Identify and ask three current donors to increase their giving
2. Invite people to upgrade in all your materials
3. Create a monthly donor club

Report on progress for next webinar

Helpful Resources from Kim Klein

Magazine and e-newsletter

Grassroots Fundraising Journal

www.grassrootsfundraising.org

Books by Kim Klein

Reliable Fundraising in Unreliable Times

Fundraising for Social Change

Other recommended books:

Working Across Generations by Robby Rodriquez, Frances Kunreuther and Helen Kim

Accidental Fundraiser by Stephanie Roth and Mimi Ho

Order from www.josseybass.com or your local bookstore