

# Applied Fundraising *aka “arm twisting”*



by Mike Mosman

*Senior Vice President for Lands and Resources*

*Port Blakely Tree Farms*



# Arm Twisting 101 Topics

- Lessons from Donor Research
- Donor-Centered Fundraising for Loyalty
- Reference Tools for a Fund Raising Campaign
- Examples from past Campaigns
- Q&A



# Lessons from donor research

Source: *'Significant Gifts: Where Donors Direct Their Largest Gifts and Why'*  
by The Center on Philanthropy at Indiana University (2009)

- Donors are more willing to give when someone they know asks them personally.
- Donors asked in person gave 19% more when compared with telephone, mail, or email requests by someone they knew.
- Donors who reported receiving substantial recognition for their contributions made larger gifts than those receiving minimal or moderate recognition.
- Donors who received token gifts as recognition had the second lowest average gift

**People give most when friends ask**



# Donor-Centered Fundraising

Source: *Donor-Centered Fundraising* by Penelope Burk (2000), President  
Cygnus Applied Research [www.cygresearch.com](http://www.cygresearch.com)

- Organizations are good finding donors, not at retaining them
- 30% of alumni give a first gift, 85% then stop
- Donors do not consider their first gift generous
- An organization's 'brand' will only hook a donor one time
- **Three key things** that make donors loyal:
  1. A quality and personal acknowledgement within 2 weeks of gifting
  2. Some reassurance that their gifts have been set to work as intended
  3. Measurable results – a progress report with qualitative and quantitative information

**Donors do not give up on philanthropy,  
they just go elsewhere**





# Donor-Centered Fundraising

## The Art of the “Thank You”

Messaging Summary for 2010 Haiti relief donations

by Doctors Without Borders (*Médecins sans frontières*)

A concise message came within 24 hours of a donation and reported:

- the types of injuries DWB medical personnel are commonly treating
- the number of treatment facilities they have already established
- reassurance that DWB’s medical stocks are not yet exhausted
- the quantity of medical supplies that will arrive that day
- the number of staff on the ground and the number on their way
- The message also promised more, regular updates.
- The message acknowledged the horrific extent of this disaster, but the message’s language was practical, confident and reassuring.

**Sincere appreciation and measurable results -  
exactly what donors want. And, it’s *all* that they want.**

Applied Fundraising  
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Joint Oregon/Washington Society of American Foresters  
Leadership Conference January 21, 2012

# *Reference Tools for a Fund Raising Campaign (Handout)*

- What's needed for a campaign
- The basics of a good letter
- The Thank You
- The Superior Thank You
- Follow-up phone calls
- Good and bad examples from past campaigns



# What's needed for a fundraising campaign

- A clear understanding of what you are 'selling'
- Committed campaign team that believes
- Clear benchmarked goals, objectives and timelines for the campaign
- Accurate database of potential donors
- A communication strategy that insures the needs of the donors are met
- A personal contact, preferably by someone that knows the donor
- Follow-up contact to update the donor on the organization and how their money was used

# Good and Bad Examples from Past Campaigns

## 2003 WSSAF Page One

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Example 6.a: page 1:

2003 WSSAF Letter

Washington State Society of American Foresters

www.waforestry.org

April 29, 2003

«Name Prefix» «First Name» «Last Name»

**Impersonal start – this needs to be from a friend or peer**

**Campaign was unfocused, benefitting too many things. Donors need something solid to get behind.**

Dear «First Name»:

The Washington State Society of American Foresters, established and directed by local forestry professionals, is embarking on a new campaign unlike any previous fundraising effort. This year's fundraising drive will support not only the annual convention in Kelso, but the society's exhibit at the Western Washington State Fair in Puyallup, the Northwest office, statewide policy efforts, newly established WSSAF Education Foundation, and the website at [www.waforestry.org](http://www.waforestry.org).

Your involvement with the Washington State Society of American Foresters is a very important commitment to the future of Washington's forests. As you can see from the enclosed brochure, WSSAF plays a major role in supporting the foresters that manage Washington State's 21 million acres of forestland. The WSSAF has a strong executive committee of 20 community leaders. The SAF Northwest office will increase public visibility of both the Oregon and Washington societies and highlight the role professional forester's play in the stewardship of forest resources.

It has taken an extraordinary effort to get this built, and now it will take extraordinary generosity to keep it going. You, your company or your organization can help support the efforts of WSSAF by providing much needed financial support. Your donation will help provide:

- Increased visibility for the forestry profession through the Northwest office (our goal is to make the Northwest office the primary source for credible and reliable forestry information in the Pacific Northwest)
- Valuable opportunities for continued professional education (certified forester education credits)
- Strengthened involvement in the legislature
- New growth and success for our profession
- Public outreach for a fair and balanced approach on the environment (traveling fair exhibit provides facts on forestry in Washington)

*Two pages is too many!*



# Good and Bad Examples from Past Campaigns

## 2003 WSSAF

### Page Two

20 mixed donors  
\$3,650 raised

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Example 6.a page 2:

2003 WSSAF Letter

Please use the following reply form to re-affirm your support with a generous donation, and if you have any questions, please don't hesitate to contact one of us at the phone numbers listed below.

Your financial assistance helps us to meet these challenges and we thank you.

**Passivity – giving the donor permission to make contact, no active follow-up by campaign team.**

Mike Mosman  
Vice President  
Port Blakely Tree Farms  
(360) 570-1992

Marco  
Environmental Analyst

City of Seattle  
Seattle Public Utilities  
(206) 233-1569

Scott Swanson  
Vice President Operations  
West Fork Timber Company, LLC  
(253) 383-5871

Norm Schiaaff  
Vice President Timberland and  
Administration  
Merrill & Ring  
(360) 452-2367

#### Example 6.a – 2003 WSSAF Letter

*"Send the letter out and hope for the best"*

1. Campaign objectives were not focused.
2. Campaign audience not clearly identified, no clean database available in 2003.
3. Letter is too long – average readers give you 51 seconds of their attention.
4. Letter is plain boring – real examples, humor, anything could have livened this up and caught the interest of more potential donors.
5. No follow-up.

-----  
Yes, you can contact

Enclosed is my card  
Mosman, Port Blakely  
7247.

# Good and Bad Examples from Past Campaigns

## 2008 WSSAF

40 mixed donors  
\$10,350 raised

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Example 6.b:

2008 WSSAF Letter



PORT BLAKELY  
TREE FARMS LP

P: 360-570-1992 F: 360-570-0311  
8133 River Road Drive Tumwater, WA 98501  
www.portblakely.com

Integrity and Innovation

January 20, 2008

Dear \_\_\_\_\_

**Peer request with company  
letterhead - more direct message**

**Focused need -  
clearer objectives**

I am writing to ask for you and your organization's financial support for the Washington State Society of American Foresters 2008 annual meeting to be held at Little Creek Casino near Shelton on May 28, 29 and 30. With this year's convention theme, "Forest in Transition," we are highlighting the opportunities created as forestry in Washington changes in response to growing population and climate change. Pete Heide is chairing the annual meeting and we are hard to identify timely topics and work them into informative, exciting presentations that will benefit the professional foresters of Washington State.

We all know how hard it is becoming to recruit good professional foresters. Here is an opportunity for you to show your support for the continued development of the great professional foresters we do have. Your support will allow us to attract the best possible speakers and assure broad professional participation in the meeting. The annual meeting provides foresters with a great opportunity to meet and learn from each other and from those we work with.

Each sponsor will be recognized with banners at the meeting and on printed material in the program. The enclosed form provides some suggested sponsorship opportunities. We invite you to provide us with the appropriate company logo along with your donation. The Washington State Society of American Foresters is a 501(c)(3) organization.

Sincerely,

PORT BLAKELY TREE FARMS LP

Mike Mosman  
Vice President-Resources

Attachment

**The  
"Why"  
they  
should  
donate**

### Example 6.b - 2008 WSSAF Letter

1. Campaign objectives more focused.
2. Campaign audience better identified with improved database than in 2003.
3. Letter is shorter and to the point.
4. Letter provided a reason to donate.
6. Poor, inconsistent follow-up.

# Good and Bad Examples from Past Campaigns

## 2011 WA/OR Joint

22 Companies  
\$33,000 raised

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Example 6.c:

2011 WA/OR SAF Joint Letter

Peer request by donors with a clear "what"

Peer Letterheads alongside SAF Logo



Dear «Name\_First»:

We are writing to ask that you and your organization join us in sponsoring a conference of the Oregon/Washington Society of American Foresters (SAF). The conference will be held at the Jantzen Beach Red Lion, Portland, Oregon, May 11-13, 2011. We all know how hard it is to recruit good professional foresters. Sponsoring this conference is an opportunity to invest in the continued development of the great professional foresters we do have, to show that we value their commitment to the profession.

It has been several years since the two SAF state societies met as a group and the gathering is expected at this year's event. The theme of the conference is "Keeping Forests Forest," highlighting the importance of working forestlands and emerging markets for forest landowners and managers. Mike Cloughesy, Oregon SAF State Chapter committee have put together an outstanding program on forest products, ecosystem services, and policy issues that will benefit and resonate with the Pacific Northwest. Your financial support for this year's conference will help our committee to attract the best possible speakers and assure broad professional participation in the meeting, while keeping the cost to the registrants at a reasonable level.

We invite you join us as sponsors of this important annual meeting of our professional foresters. Please consider a pledge at one of the following:

Platinum: \$5,000 or more  
Gold: \$2,500  
Silver: \$1,000

Results: \$33,000  
0 Platinum  
5 Gold  
17 Silver

Each sponsor will be recognized on all signage and printed program. Additionally, there are three complimentary registrations available for Platinum sponsors, two for Gold and one for Silver sponsor.

There are also opportunities for vendor exhibits at the conference. If you are planning a vendor exhibit, please contact Michael Taylor at 503.805.1222.

Over the next three weeks someone on our committee will contact you to discuss this opportunity to support our professional foresters. We greatly appreciate your continued support.

Sincerely,

Mike Mosman  
Senior Vice President-Resources  
Port Blakely Tree Farms LP

Matthew Donegan  
Co-President  
Forest Capital Partners, LLC

Ann Forest Burns  
Vice President  
American Forest Resource Council  
Ray Jones  
Vice President, Resources  
Stimson Lumber Company, Inc.

Clear "why" to donate

Known "brand"

Originally we planned on setting the "ask" range between \$500 - \$3,000. What would have been the results?

Most important: FOLLOW-UP!



# Good and Bad Examples from Past Campaigns

## 2011 Briggs Endowment Email Campaign

12 Cooperators  
\$35,000 raised

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Example 6.d:

2011 Briggs Endowment – proposal

From: Mosman, Mike  
Sent: Monday, November 07, 2011 7:39 AM  
To: SMC Industrial Cooperator Distribution List  
Subject: Honoring Dave Briggs

### Email Campaign

Fellow Cooperators,

As you all know, Dave Briggs is retiring in December from the University of Washington. Dave has been a member of the SMC Stand Management Cooperative, more than most, have reasons to be grateful for many of his contributions he made during his fifteen years as the cooperative's Executive Director. Thanks to Dave's steady hand and budgeting creativity the Cooperative continues to meet its mission of producing the highest quality Douglas-fir seed sets in the world. No easy task given the policy and ownership turmoil over that same period.

To honor Dave I'm asking you and your organization to join Port Blakely in contributing to a Endowed Fund at the University in Dave's name. We need to raise a minimum of \$25,000 to create a general student support fund that will assist an undergraduate or graduate student involved with the SMC with tuition costs. This named fund will honor Dave in perpetuity while providing much-needed tuition dollars to students who will succeed us as the next generation of leaders in forest management.

So dang! You had to read this far to see that this is a solicitation email. You have already figured out that I am not very good at this – I'm not – but I hope that you will because we really should do this for all the rubbish Dave has put up with from us over the last fifteen years.

Please join us and your fellow Cooperative members by contributing between \$2,000 and \$5,000 to Dave's endowment fund; Port Blakely will be contributing \$3,000. A very nice lady at the University's Advancement Office, Caroline Rosevear (206-221-0562), told me we could contribute now with cash or make pledges payable over the next two years – very flexible for budgeting purposes.

I did my best to limit the distribution list for this email to who would be in contact for each industry organization. Please let me know if I can provide you with some clarification regarding the fund.

Please note: For obvious reasons, we'd like the pledge forms turned in to Caroline before Dave's retirement in December.

Thanks!

Mike

Email kept short – same rules as letters

Bean counter details on how to make a pledge sent in attachment, kept out of main email.

The "ASK" should have been in first sentence of first paragraph.

The target is well-defined

Peer "elephant bumping"

Important for emails:  
Let recipients know message is specifically sent to them.

Campaign urgency



# Good and Bad Examples from Past Campaigns

Arm Twisting 101

Example 6.f:

2011 Briggs Endowment Donor Note

Mike,

Thanks for taking the lead in organizing this effort. We have appreciated Dave's service over the years and his high quality leadership of the SMC.

We will be contributing \$3,000 as well and will send that in right away. I hope this will honor Dave and help support the students following in his footsteps.

Dave Furtwangler  
Cascade Timber Consulting  
Sweet Home, OR

From: Mosman, Mike [<mailto:mmosman@forestry.wa.gov>]  
Sent: Thursday, October 27, 2011 6:00 PM  
To: Distribution List  
Subject: RE: Honoring Dave Briggs

Fellow Cooperators,  
I love this industry and the people in it. I'm proud of.

In seven days nine companies have contributed \$4,000; we are very close to our minimum goal. The generosity of the owners and employees of Lone Rock, Longview Timber, Port Blaney, Mayberry, West Fork Timber and Weyerhaeuser is much appreciated.

We hope that you and your company will join us in contributing to this endowment fund to honor Dave at his retirement.

**Volunteers are often reluctant to ask their own friends or peers for donations, but over and over this is the response you will get if you and the donor have a shared objective.**

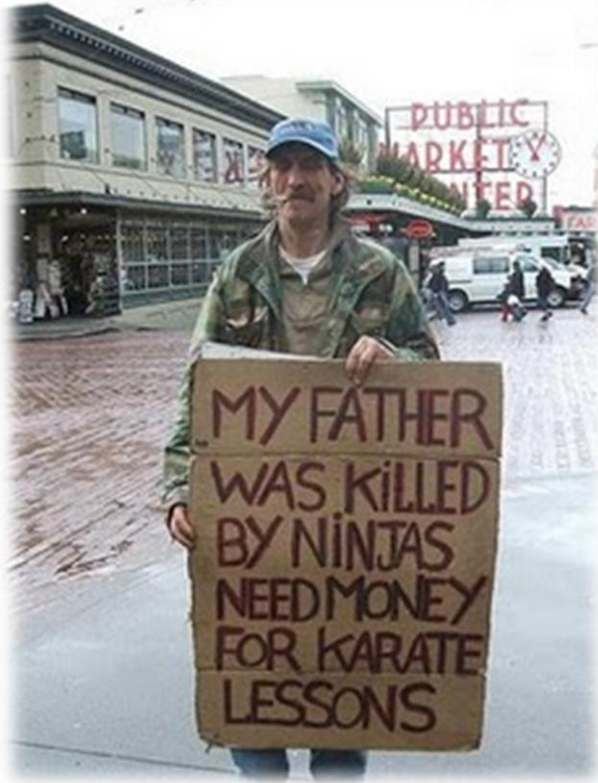


# Donor-Centric Innovation Helps

- Make it easy for donors to give
  - \$20/month is easier than a single \$240 gift
  - Multi-year pledges are easier on budgets
- Expand your donor universe
- Look for innovations like Instant Text:
  - \$200,000 for Texted for Tsunami Relief
  - \$425,000 for Katrina Relief
  - \$25,000,000 for Haiti



# So Does Humor...Especially Humor



Having a clear mission and identified need is a must



Being creative and providing donors with strong motivation also helps