

## Identifying Prospective Donors and Crafting Tailored Materials

A set of generic fundraising materials likely won't help you raise much money. To grab a funder's attention, do your homework to identify prospects that are a good fit for your work and then tailor your pitch to speak directly to what they care about most. Consider the following steps to help cultivate potential donors.

### Identifying and Prioritizing Fundraising Prospects

**Reflect on your fundraising strengths and weaknesses.** Before launching into a search for new prospects, take time to reflect on who already supports you. Examine your funder types – individual donors, foundations, corporations – and the issues they care about – health, children and youth, social justice, the local community, the economy, etc. Do you have a strong individual donor program but need to increase your outreach to foundations? Have you had recent success with funders concerned about children and youth? Equipped with a solid understanding of the strengths and weaknesses of your current fundraising efforts, you will be better positioned to identify promising new targets.

**Clarify your funding priorities.** Think about your strategic goals for the next year, three years and five years. What specific programs or initiatives do you want funding for? Do you need general operating support? Are you planning a specific campaign? Different funders will make different types of donations. Make sure your needs match the funder's guidelines and priorities.

**Do your homework to find new prospects.** With a clear understanding of your goals and fundraising avenues ripe for expansion, do your homework to identify new targets. Search online databases such as the [Foundation Center](#), [GrantStation](#) and [FoundationSearch](#) to learn about grantmakers and their funding activities. Use these research tools to identify the top corporate giving programs and community foundations in your area.

When researching individual philanthropists, access prospect databases through your local Foundation Center library to learn about donors' giving potential and interests. Read philanthropy news sources such as [Philanthropy News Digest](#) and [The Chronicle of Philanthropy](#) to learn about trends in philanthropic giving. Sign up for the [Grantmakers in Health](#) newsletter to better understand the concerns of health funders. The more you know about your prospects, the better you can hone your fundraising strategy.

**Tap into your network.** Take your research beyond the Internet. Reach out to targeted current donors to thank them for their support, and ask them to introduce you to other potential donors. Donors like to bring others on board to support causes close to their heart and will appreciate your nonmonetary ask for assistance. Consider other supporters you could ask for help. Your organization's board of directors is a great place to identify potential targets.

**Prioritize your targets.** You will be more successful if you focus on very specific targets rather than casting a wide net. Is there a clear link between the prospect's funding priorities and your work? Have they supported similar projects in the recent past? Are they committed to your geographic area? Do the sizes of their grants or donations match with your project needs? Do you have relationships with the funder or donor you could build on? Rank your list of prospects by evaluating who are the most realistic targets.

## Tailoring Your Pitch

**Frame your pitch around the donor or funder's core values.** Before you begin developing your pitch, consult your research and think carefully about what your prospect cares about. Make sure your pitch appeals to the concerns most important to the donor or funder – this may or may not be the value that *you* want them to care about. For example, while you may be motivated by the social justice implications of your work, the donor may be primarily concerned with how expanding health access will improve the local economy.

Think carefully about a clear, realistic ask to propose to the funder. Has the company supported events through corporate sponsorship in the past? Does an individual donor have a history of making commemorative gifts? Does a foundation make grants for general operating support? Be thoughtful about aligning your request with the funding strategy of the prospect. Additionally, don't forget to consider requests for nonmonetary support, such as making an important introduction, providing in-kind support or hosting a convening. See "Creating a Compelling One-Pager" for more guidance on the content and structure for your appeal.

**Emphasize your vision.** Too often appeal letters and proposals detail tactics but fail to paint a picture of the larger impact of the work. Be sure to start your pitch by describing the problem that needs to be solved or the opportunity at hand, framed around the core concerns of your prospect. Then, in addition to describing the specific actions you will take, make the case for why you are best positioned to do this work. Close your pitch with a vision of what you will accomplish as a result of their support that clearly connects to the donor or funder's core concerns. If your prospect is motivated by improving the lives of children, close your pitch with a compelling description of how your work will help youth in your community.

**Warm your inquiries.** After tapping your network to identify new prospects, follow up to request an introduction to your most promising targets. Use LinkedIn to map out your connections. Consider engaging your second-degree connections by asking your supporters for an introduction to their friends or colleagues who have a relationship with the donor or funder. Additionally, flex your networking muscles and develop new connections to your prospects. Does the individual donor you are pursuing belong to an affinity group you could join? Does a company you have in your sights host a community luncheon you could support? Is a program officer you want to get to know speaking at a conference you could attend?

**Craft your approach.** Carefully consider your approach by supporter type. It's more effective to approach individual donors through a personal introduction. Corporations, however, are more likely to accept requests for meetings that are made by one of their own employees who is passionate about a cause. Some foundations explicitly state their preferences for initial introductions. If they do not state a preference, it is generally safe to send an introductory email and then follow up with a call.

At all stages of your approach, use your research and frame your pitch around the core concerns of your audience. Be ready with talking points to guide your initial phone call, create an agenda to guide your first meeting, prepare a one-pager as a leave-behind summary of your work and carefully follow instructions when drafting a proposal. Unless specifically requested, refrain from sending supplemental materials with a proposal, such as clippings or endorsement letters, to respect the reviewer's time. Be sure to send a thank you letter and keep the relationship warm.

**Test your pitch.** Not sure if your pitch will hit home? Ask a current donor or funder for his or her opinion or

seek out supporters who know the prospect and ask what they think.

**Continue to engage your prospect.** Often it takes time to build relationships with donors and funders. Even if they don't say yes immediately, keep in touch. Send a periodic update about your organization's efforts. Email them a news clip about a topic about which they expressed interest. Invite them to an event so they can get to know your organization's work better. Commit to making a focused, strategic effort to cultivate the relationship and plan touch points for engaging your prospect over the next 12 months.

## Creating a Compelling One-Pager

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When reaching out to a potential funder or donor, you'll want to make a connection quickly. A one-pager is not a substitute for more in-depth communication, but rather a complement to your conversation that you can leave behind or send ahead of time that summarizes your work and touts your accomplishments.

### Content and Structure

**Three main messages and your ask.** Research shows that our memory can only handle four things at a time. If you include more than four messages, you run the risk that the funder or donor will pick and choose what she is going to remember. It's important to utilize your three main points to identify the problem you're seeking to solve, your organization's unique solution to that problem and evidence of your past success. The final point is your ask.

**Clear ask.** What do you want the funder or donor to do? Every collateral piece needs to have a clear ask. Make sure the funder knows what you want from her after she's done reading.

**Clear, concise writing.** There is no need to use SAT words on a brief collateral piece. Write clearly, concisely and understandably. Avoid run-on sentences, insider lingo and jargon; don't overuse numbers and statistics.

**Statistics and data.** Donors and funders want to know that their money will be used wisely. Make sure you use statistics and data to demonstrate the need, your impact and past successes. Whenever possible, use community or statewide statistics (as opposed to national numbers) to keep it relevant and more tangible. A few startling statistics or data points can be powerful; but overloading the one-pager with data can lessen the impact and make the numbers seem meaningless. You should also consider presenting data in a compelling way so it doesn't overwhelm the reader. Learn more about how to create infographics and use "social math" to convey data and statistics in a reader-friendly way in the Creating Strong Visuals section of the toolkit.

**Storytelling.** Put a human face on your organization's wins. Stories – even short ones – bring statistics and data to life. They have the power to draw the reader in quickly and can help articulate the importance of the problem or describe why your organization has the (best) solution. When possible, select a subject from the communities you serve and use his or her full name and where they are from to make the person more real in the funder's mind.

**Structure.** Make sure the information flows coherently from one point to the next. For example, the problem should be presented before you describe how your organization is helping to solve the problem.

**Third person.** Refer to your organization by name (or acronym after the first mention) when possible to avoid confusion over which "us" you're talking about. This is especially helpful if you are talking about a coalition or work you do with partners.

**Contact information.** Be sure to include contact information the funder is most likely to need – whether it is a phone number, email address or mailing address – to ensure the funder knows how to continue the conversation.

**Up-to-Date.** Update the one-pager on a regular basis to ensure it reflects the current landscape and highlights your most recent wins. Regular updates also mean you’re not scrambling at the last minute before a meeting.

## Creating the One-Pager

There are two types of one-pagers for funders and donors: Informative and persuasive. The distinction between the two are the three messages and the ask. See Appendices A and B for templates of an informative and persuasive one-pager respectively.

The **informative one-pager** focuses on what you do and why it’s important. This type of one-pager may be more useful with a donor or funder your organization has not worked with before. The purpose of this one-pager is to share about your organization or a specific project, with the goal of getting them more interested in your work. Even though the one-pager is more of an introduction to your organization, you should still include an ask. Examples of asks include, “Visit our website” or “Call to donate.”

A **persuasive one-pager** focuses on a particular issue or problem, the solution or approach your organization takes to fix it, and how the funder or donor should get involved. Since this one-pager is more targeted, it should be used with donors or funders who are already familiar with your organization. Your ask should demonstrate how the donor or funder can make a difference. Provide them with something specific to do, such as buying a table at a fundraising gala or introducing your executive director to two other prospective donors.

Informative	Persuasive
Strong lead	Strong lead
Story	Story
Image	Image
Three Points	Three Points
<div>1. We matter. Why the reader should learn more about your organization/issue.</div> <div>2. Success. Describe a recent win your audience would also consider a win.</div> <div>3. What’s next. Show them why your upcoming work will matter for them.</div>	<div>1. Problem matters. Why they should share your concern about the problem.</div> <div>2. Our solution will help. How your work addresses problem and your results.</div> <div>3. Make a difference. Describe the role your audience can play in helping solve the problem.</div>
Specific Ask	Specific Ask

## Design

**Consistency.** The piece should have a consistent feel and should reflect your organization's branding and adhere to your style guide.

**Readable font.** Avoid using cutesy or fun fonts. The one-pager is a reflection of your organization and you want to convey professionalism. Use an easy-to-read font; don't make it smaller than 10-point.

**Appealing layout.** Make sure the piece isn't too busy or too wordy; white space is critical. Spread out images to make the document visually appealing.

**Eye-catching visuals/graphics.** Use visuals that resonate with your target audience so they see themselves in your work. Avoid clip art and cartoon images to maintain a professional appearance. Graphics should reflect your work, your audience, the population you are serving or the problem you are addressing. If you tell a story, include a picture of the person whose story you are telling.

## Creating Strong Visuals to Reach Funders and Donors

Images help people understand and process information of all types, and research shows we process images 60,000 times faster than text. If done right, visual content can help show off your organization's successes and attract future funders and donors. Visuals are not necessarily difficult to create, but they do require strategy and an eye for design.

### Strategy

Before you get started creating an infographic or other visual, think about what you need to convey and who you need to reach. Do you need one or two large funders to support your organization? In that case, you may want to convey your organization's big wins over the last year. Do you need a number of small donors to keep a specific program running? Then you might be better creating an infographic to visualize what small donations will mean to the program along with its specific wins over the last year. Sit down and think about what information will attract the target audience you need to reach and *then* start planning content to spark their attention.

### Types of Visuals

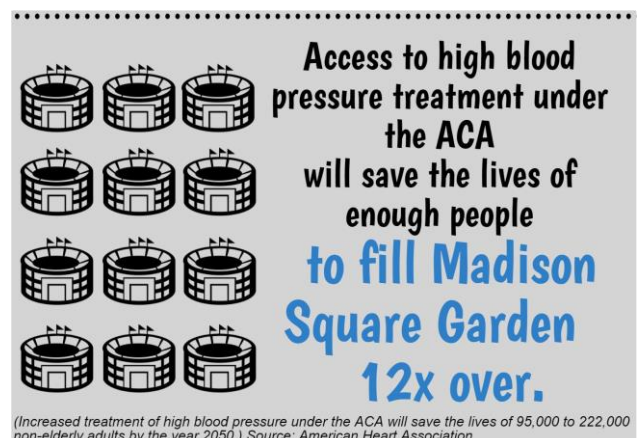
#### Image Overlay

Image overlays are best to create when you have a high quality photo (either stock or your own) of someone that your organization helps. While securing high quality original photos can be harder to obtain, they tend to be more effective. The photo should capture the right emotion, resonate with your audience and be compelling. Aspirational, positive images are more likely to receive likes and shares on social media. Keep text to a minimum – words can only be 20 percent of the total image if you plan to promote it on Facebook.



#### Infographic

An infographic is a combination of images and text. It's best for when you are working with statistics or facts that need both text and visuals in order to be effective. Consider using photos, symbols and varying sizes of text and color. Infographics can come in all types and sizes, such as the one to the right, which uses "social math" to help audiences comprehend the true meaning of large numbers. Infographics can also be longer and more comprehensive, such as providing an overview of an organization's wins over the last year. Take a look at the U.S. Soccer Foundation's infographic on the next page. The organization created it for an online donation page to help audiences visualize the number of underserved children who benefited from the Soccer for Success program. We've included more infographic examples in Appendix C.





## Design Rules

Follow these guidelines when designing an image for your organization:

- **Embrace Simplicity.** A simple visual is more effective, easier to read and easier to create.
- **Achieve Balance.** A balanced image, with a proportionate amount of white space, image and text, is more visually attractive.
- **Focus on Readability.** Use fonts that one can easily read on a computer screen, such as Calibri or Arial.
- **Create Contrast.** Use contrasting colors in your image to make the text easier to read. A handy tip is to use a color-filled text box with a small amount of transparency to make text pop.
- **Include your Brand.** The goal of visuals is nearly always to have them reach as many people as possible. While you might post the visual from your Facebook or Twitter account that has your profile photo, if others share the graphic that identification is lost. Be sure to include your logo and Web address on all visuals.

## Useful Tools

Once you have planned your content, choose from a variety of tools to help you bring it to life:

- **PowerPoint.** All slides can be saved as a JPEG. Just click on Save As, and then select JPEG from the drop-down menu.
- **Piktochart.** This interactive website includes a selection of easy-to-use infographic templates and a handy icon library, so novices don't have to create something from scratch.
- **Canva.** An online tool that offers design templates optimized for each social media platform, includes an icon library and has a design school with free tutorials.

## Review Questions

Once you have a first draft of the infographic, make sure to ask yourself these questions:

- Will it resonate with your audience?
- Is the data simple?
- Does it have a clear ask?
- Did you remove clutter?
- Is it visually appealing?
- Is our logo on it?

## BY THE NUMBERS

MORE  
KIDS



MORE  
PLACES



SHARING  
THE  
GAME



## MORE CHANCES

43,000 kids wanted to participate in a U.S. Soccer Foundation program, and we did not have the resources to accommodate them. How about creating chances for More Kids ... More Places?

MAKE A DONATION



Once you've answered "yes" to those questions, consider having a few other staff members – who haven't seen any previous versions of your infographic – review it and answer those questions as well.

## Appendix A: Informational One-pager Template

# Your Letterhead

## You Can't Afford Not to Keep Reading – Says Your Title

### Compelling Story

Sharing people's stories is a compelling way to demonstrate the importance of your organization's work and make complex health care issues easier for funders and donors to understand and relate to. You can tell a story in a few paragraphs or just a few sentences. Use real people from the communities you serve who can speak firsthand about how your organization helped them.

### We Matter

This section explains why they should learn more about your organization. Start with what makes you different from the rest – the oldest, the largest, the only, award-winning. The more you know about a particular donor or funder, the more you can customize. If you know they value commitment, focus on your track record of service to the community. If they value innovation, talk about your creative ideas and the difference those ideas have made.



**We helped this family in the community, and now they are so happy.**

### Relevant Success

This section is for cheerleading. Use this space to describe a recent win that your audience would also consider a win. If you know this donor or funder is interested in expanding coverage, focus on how many people you helped enroll. If they have a primary interest in the bottom line, talk up how your approach helps save taxpayer dollars.

### What's Next?

Show how working with you can help your audience. Preview an upcoming challenge or project and your plans to tackle it. Show the donor or funder why your upcoming work will matter for them. If your next project is a website redesign, explain how the new site will help the communities you serve.

### Specific Ask

Yes, you should have an ask – even for an informational one-pager. Your ask might be to visit your website and learn more, to call for additional information, or to forward copies of the one-pager to three colleagues. The emphasis here is on specific – “support our new outreach campaign” is not specific, but “support our new outreach campaign by calling 800-ONE-PAGE to make a donation” is.

### Contact Us

You can include individual name(s), organization name, address (and mailing address, if different), phone and fax, Email and website.

## Appendix B: Persuasive One-pager Template

# Your Letterhead

## You Can't Afford Not to Keep Reading – Says Your Title

### Compelling Story

Sharing people's stories is a compelling way to demonstrate the importance of your organization's work and make complex health care issues easier for funders and donors to understand and relate to. You can tell a story in a few paragraphs or just a few sentences. Use real people from the communities you serve who can speak firsthand about how your organization helped them.

### The Problem Matters

This section explains why they should share your concern about the problem. Focus on how it affects that particular donor or funder. If they have a specific geographic focus, emphasize the impact in that area. If they work with a particular demographic, highlight the threat posed to that population. If they are all about economic impacts, focus on the business, jobs or consumer angle that will help you connect.

### Our Solution Will Help

Show off your bright idea. Don't get lost in the weeds trying to lay it all out. Just give them a flyover – a top-level summary of your proposal; an introduction to how it will work to address the problem; and especially the results for the community, population, or issue your audience cares most about.

### You Can Make a Difference

You must have a role in mind for the donor or funder, or you wouldn't be meeting with them. Explain how your solution moves forward if they get involved.

### Specific Ask

In this section, show them how they can make a difference. Give them one very specific thing to do – buy a table for our fundraising gala or introduce us to two other donors.

### Contact Us

You can include individual name(s), organization name, address (and mailing address, if different), phone and fax, Email and website.



**With your support, we can solve this problem.**

## Appendix C: Infographics as Fundraising Tools

Organizations can create infographics describing what various donation amounts would do for a specific program, such as this one from Project Concern International's Think Forward initiative.



This infographic is straightforward, simple to create and helps audiences visualize what their donation can do.





This visual tells a success story and asks for donations in a compelling way. One flaw is that it never states the name of the organization – Environment California – so we don't know who deserves the credit!

**We just took the BIGGEST STEP FOR CLEAN WATER in a decade**

For over 30 years, the Clean Water Act protected all of our waterways

 WETLANDS

 RIVERS

 LAKES

 STREAMS

Then in 2006, polluting industries carved loopholes in the law, leaving **2 million miles of streams** at risk to pollution

So, we fought back. We investigated, testified, lobbied, raised awareness and involved everybody from farmers to local elected officials.



Then last November, 800,000 of us urged President Obama and the EPA to close the loopholes.

**And on Wednesday, we won!**

And now we have to keep Congress from overturning our victory. Chip in here to keep the good news flowing for the rivers and streams we love.

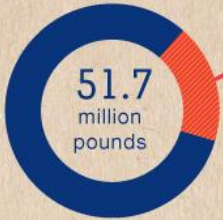
**DONATE**

The Atlanta Community Food Bank used this infographic for their year-end report. While the image is branded clearly with the organization's colors and logo, it could be improved with social math to help audiences visualize what 51.7 million pounds of food looks like.


**FEEDING A HEALTHY FUTURE**  
2013- 2014 ANNUAL REPORT

**ATLANTA COMMUNITY FOOD BANK**

**FOOD DISTRIBUTED**




51.7 million pounds



9.3 million pounds of produce

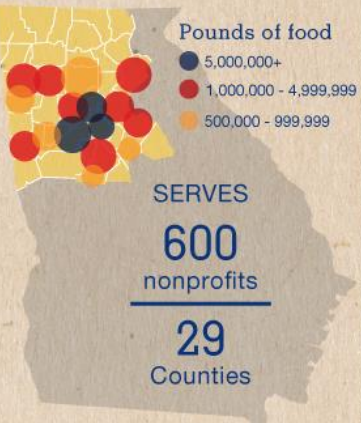
40.6% increase



43 million meals

13.4% Increase

**THE IMPACT OF YOUR DOLLAR**




Pounds of food

- 5,000,000+
- 1,000,000 - 4,999,999
- 500,000 - 999,999

SERVES **600** nonprofits

**29** Counties




95% Programs & Services


2% Fundraising

3% Administration


**PROGRAMS**




57,954 pounds of produce distributed




\$820,574 raised, a new record




19,000+ volunteers



1,448 approved for services









4,976 teachers in 261 schools



3,245 people educated

**FOR EVERY \$1 DONATED, ACFB CAN DISTRIBUTE MORE THAN \$9 IN GROCERIES TO SOMEONE IN NEED.**

acfb.org | #ACFBImpact





The American Heart Association thanks former donors and asks for new donations to continue building on their success in this visual. Symbols and a simple design help the reader's eye move down the graphic.



## 7 AMAZING THINGS Donors Have Made Possible

Look how much good a gift to the American Heart Association and American Stroke Association can do!

- 8.8%** Helped Reduce Cardiovascular Disease Deaths by 8.8 Percent Since 2007  
Helping millions of Americans live longer, healthier lives
- 10%** Helped Reduce Stroke Deaths by 10 Percent Since 2007  
Giving millions of Americans more precious days with loved ones
- Funded nearly 1,000 Cardiovascular Research Projects in the 2012-13 fiscal year**  
Making us the top funder of cardiovascular research outside the federal government
- Supported more than 175 Teaching Gardens**  
Teaching healthy eating habits to roughly 80,000 students and countless more parents and siblings
- Trained 13.6 Million Americans in 2012-13**  
Equipping them in CPR, first aid and advanced cardiovascular life support
- Passed Student CPR Bills in 11 States**  
Requiring CPR training for students before high school graduation
- Implemented "Get With The Guidelines" in more than 2,000 Hospitals**  
Dramatically improving outcomes in heart disease and stroke

Imagine how many more lives can be saved with your help today. The next great achievement in heart and stroke health awaits your investment!

**Make more miracles.**

Make a year-end gift to the American Heart Association and American Stroke Association

American Heart Association | American Stroke Association

Hooks such as holidays or anniversaries can be a great way to connect to your audience. International Bipolar Foundation incorporated the holiday season into this colorful graphic.



## GIVE THE Gift OF Health THIS HOLIDAY SEASON

In the spirit of the giving season, we hope you will be inspired by this list below to give a gift of health which will enable us to continue providing bipolar disorder educational programs.

- \$50** A \$50 gift will provide 25 Girl Scout Mental Health Awareness Patches to young girls across America who have met our mental health awareness criteria. 
- \$100** A \$100 gift provides four of our Healthy Living with Bipolar Disorder books to consumers, caregivers and professionals. 
- \$300** A \$300 gift helps us organize an educational webinar for 75-250 participants. 
- \$500** A \$500 gift allows us to make a videotaped lecture series accessible to thousands of individuals around the globe. 
- \$?** Or perhaps there is another level of support that would help us expand our programs to those who would otherwise go without. 

**internationalbipolarfoundation**  
A world of hope, resources and support

**DONATE NOW: [www.ibpf.org/donate](http://www.ibpf.org/donate)**