



Effective Strategies For Diversifying Funding

Author: Alberto A. González, Senior State Advocacy Manager,
Community Catalyst

WHAT'S INSIDE:

- » **Overview** PAGE 1
- » **Identify** PAGE 2
- » **Cultivate** PAGE 3
- » **Solicit** PAGE 4
- » **Stewardship** PAGE 8
- » **Conclusion** PAGE 9

OVERVIEW

Effective Strategies for Diversifying Funding



Consumer health advocates are now determining how to pivot their work and build on the momentum made last year in mobilizing thousands of supporters and engaging key decision makers to protect the Affordable Care Act. In order to continue this important work, advocates will need a diverse pool of non-grant resources that will provide the flexibility needed to ensure advocacy efforts have a real impact at the state and local level.

The following toolkit includes tips and tools from advocates around the country who have developed and implemented effective fundraising strategies to sustain advocacy work. It includes best practices for identifying, cultivating, soliciting and stewarding donors. These successful fundraising strategies aim to bring in more unrestricted dollars from individual donors - high to low level - to sustain the important health advocacy work needed to protect health coverage and access for millions across the country. Building out an effective fundraising program where you nurture and engage individuals can help you bring in a consistent stream of donors that are inspired by the broader mission of your organization, rather than just one body of work.



IDENTIFY

Effective Strategies for Diversifying Funding



Know your existing donors.

- **Learn** who your donors are and why they contribute, and identify major donors. Do they support particular issues your organization is advocating for? Are they compelled to contribute because they have a family member or a loved one who is living with a health condition?
- **Track** where and how donors are making their contributions (e.g., through your website, on social media, via email, through personal asks, etc.) to learn what is the best way to reach them.
- **Work** across your departments to identify the most engaged donors. For example, Nebraska Appleseed had their development and program staff meet regularly, integrated their lists of donor and grassroots organizing activists and then explored ways to engage people more deliberately through program updates and fundraising drives. Arab Community Center for Economic and Social Services (ACCESS) in Michigan has found that donors prefer a participatory form of giving, such as parties or events with music, where they can learn more about the organization and connect with fellow community members who are supporting of the organization.

Identify potential donors.

Learn who your prospective donors are and what interests them. Identify major donors or corporations that previously sponsored advocacy efforts. For example, [Voices for Virginia's Children](#) created a development plan to engage potential untapped individual donors and corporate sponsors to support community events. Their plan included goals, strategies and tactics for increasing individual giving, board giving, and revenue from events. They identified their top 50 prospective donors and executed a specific solicitation campaign targeting each prospect, such as inviting them to a cocktail party, setting up a “meet and greet” or sending them a mailer. [Nebraska Appleseed](#) also brainstormed lists of potential donors based on their connections to staff at the organization (family members, friends, colleagues and peers in the advocacy space) and identified the best ways to connect with them, whether over the phone, on social media or via email.

Leverage board members and staff.

Ask board members to identify potential corporate leaders or stakeholders within their existing networks who could support your fundraising efforts. Leverage board and staff connections to gather intel on what interests major donors.

Maintain relationships with existing donors.

Engage and inform existing donors of your organization's impact and success. For example, [South Carolina Appleseed](#) organized their Advocate of the Year fundraising event where they highlighted how donors helped strengthen their programs and used stories from consumers impacted by their work. They also honored a well-known community leader involved in health advocacy work and familiar to major donors, creating an opportunity to grow SC Appleseed's donor list. Additionally, don't forget to celebrate successes with your donors. Send out an email blast to donors following a major victory at the statehouse. Include the number of calls made to the switchboard, doors knocked in districts or emails directed at legislative leaders.

Build relationships with potential donors.

Invite prospective donors to local meetings or events to showcase your organization's work. Develop messaging guidance for board members to engage new donors. For example, [Pennsylvania Health Access Network \(PHAN\)](#) provided board members with talking points and one-page elevator pitches to engage donors. Have board members collaborate with development and communications staff to target messaging to potential major donors. Use social media or email communications to connect with prospective donors about looming threats to health coverage, how your organization plans to respond and needs to execute next steps. PHAN shared compelling stories on Twitter and [Facebook](#) to encourage their followers to donate.

Set goals.

Build energy around your fundraising campaigns with specific donations or dollar amounts under a compressed timeline. [Alabama Arise](#) and [Universal Health Care Access Network Ohio \(UHCAN Ohio\)](#) launched a fundraising drive via email and on [social media](#) to move 1,000 members to contribute to their organization. Include what you hope to accomplish with the amount of money you'll raise, such as

EXAMPLE IN ACTION

Create a fundraising team with development staff and field organizers to:

- Brainstorm lists of potential donors, including: family members, friends and peers.
- Develop talking points or an elevator speech for when speaking to prospective donors.
- Send emails or texts to prospective donors with personalized asks.
- Share donation links on social media (Facebook, Twitter, etc.)
- Disseminate fundraising campaign updates to prospective donors.
- Follow-up with personalized thank you letters, calls or emails once the campaign has ended.

CULTIVATE

Effective Strategies for Diversifying Funding



continuing to engage community members on advocacy efforts or educating decision makers on health policy issues impacting low-income families. [Nebraska Appleseed](#) held a pledge-a-thon with a goal of raising \$25,000 over a five-day period. NE advocates built a fundraising team that included field organizers and development staff with strong connections to donors; they also used [tools](#) from consultants like [9to5.org](#) to develop a fundraising strategy that included matching incentives, fundraising goals and a short timeline. As a result, they raised \$40,000 in one week and added 300 new donors to their list.

SOLICIT

Effective Strategies for Diversifying Funding

Be specific.

Demonstrate to donors how their donations will help make an impact at the local or state level. Offer insights into how their dollars would fund your organization's activities. For example, share how a donation of \$250 will fund materials for three community organizing trainings. Tangible elements attached to time-sensitive donor asks can often yield strong results. [Citizen Action of Wisconsin \(CA WI\)](#) combined their membership organizing model with a fundraising ask. CA WI began a [drive to organize](#) small monthly contributors to fund a permanent community organizer. The drive sought to identify 250 members who would commit to monthly dues of \$20 - \$30. These 250 members would have to sign up during a 60-day campaign or the project would be cancelled and all contributions refunded. CA WI developed a dedicated crowdfunding webpage with a video, a live 60-day countdown, a progress bar showing an up-to-date member count and an option to either pledge or to request more information. Contributions could be set up as a monthly credit card charge or a large one-time contribution.

Be creative and compelling.

Incorporate videos and photos illustrating your advocacy work and impacts. In their appeal letters, [Voices for Virginia's Children](#) highlighted a story about a Southwest Virginian youth aging out of foster care who was able to stay with her family due in part by advocates' policy wins. [South Carolina Appleseed](#) also incorporated consumer stories into their fundraising appeals and events. This approach helped SC advocates gain 100 new donors and raise over \$40,000 that season. Use fun, innovative strategies to capture the attention

SOLICIT

Effective Strategies for Diversifying Funding



of donors. [Colorado Consumer Health Initiative \(CCHI\)](#) used a “watch dog” theme featuring photos of their pets to raise their organization’s profile. They asked donors and supporters to share their own pet pictures as ways to get them to participate and contribute.

Seek sponsorships.

Develop a corporate sponsorship program in coordination with an organizational conflict of interest policy (*Don’t have one? Consider developing one!*). CCHI secured corporate sponsorships from hospital systems, insurance companies, pharmaceutical corporations, banks and other vendors, including: phone service and bookkeeping companies. Provide your vendors with an opportunity to advertise at your conferences, on banners, in newsletters and through shout-outs on social media. For example, the [Alliance for a Healthy Kansas](#) held symposiums with sponsorship programs that included local hospital systems, insurers, vendors, auditors and lobbyists. As a result, Kansas advocates were able to sell out tables at their events.

STATE EXAMPLE

Voices for Virginia’s Children launched a multi-year effort involving a group of donors or “champions” contributing \$1,000 or more per year. Board members were able to increase the number of donors in the group nearly three-fold through extensive cultivation, events and board introductions. As a result, individual giving for the organization increased by 87 percent over three years.

DONOR SOLICITATION AND CULTIVATION STRATEGIES

Events.

Host small or large events, such as happy hours, dinners, house parties or anniversary celebrations. [Maryland Health Care for All](#) holds an annual holiday fundraiser to highlight the organization’s success over the past year. [Take Action Minnesota](#) organized a high-dollar donor cultivation dinner. Promote the event via personal and professional networks. Use supporter and donor lists to mobilize people via email or by phone to attend. Engage potential event sponsors (e.g., vendors, providers, clinics, churches, hospitals). Make sure you include your “Ask” for donations in your promotion.

- Include energetic, well-known and compelling speakers. For example, [Washington Community Action Network \(CAN!\)](#) hosted a breakfast fundraiser featuring the state’s Health Benefits Exchange board chair. [Health Action New Mexico](#) hosted a 20th

SOLICIT

Help defend the ACA against the Texas Lawsuit



anniversary event honoring community leaders and featured nationally recognized health care leaders.

- Feature a consumer(s) at the event to share their story about how your advocacy work has changed their lives and how crucial it is for donors to support you organization.
- Encourage attendees to make a donation. Include sign-in sheets to build your list of donors and supporters. Draft and distribute pledge forms and/or donation envelopes. Make sure you close the event with a fundraising ask.
- Follow-up with attendees after the event with a thank you note and an “Ask” to contribute if they have not already. [UHCAN Ohio](#), for example, followed-up with their Happy Hour attendees by encouraging them to make a donation and volunteer for future events. [Colorado Organization for Latina Opportunity and Reproductive Rights \(COLOR\)](#) commissioned a local artist to produce artwork as a token of appreciation for donors—the artist created personalized “thank yous” in solicitation letters for existing and new donors.

Phone bank.

Have volunteers, staff or board members who are successful at contacting donors train others or make the most important asks. Pennsylvania Health Access Network (PHAN), Voices for Virginia’s Children and UHCAN Ohio hosted call times or “telethons” for board members to call potential, existing and lapsed donors. Follow-up with newsletters or appeals.

Canvass.

Face-to-face fundraising is one way to develop trusting relationship with potential donors. Organize one-on-one visits with high dollar donors to update them on your organization’s work and map out a plan to steward them so that you could reach back out to them when an opportunity or challenges arises (e.g., a proposal to cut back funding for children’s health programs your organization advocates on behalf). Knock on doors of donors. New Jersey Citizen Action, Washington CAN!, the Shriver Center and EverThrive IL all have door-to-door canvassing programs.

Direct mail.

Direct mail remains a very important part of individual donor solicitations and should be a part of your fundraising strategy. Tailor and coordinate the timing of your appeals. Spring appeals, for example, are the first appeal of the calendar year for many advocates and an important opportunity for advocates to inform and remind donors (especially lapsed donors) about what work their organization is doing and why they should donate to help the organization’s cause. The best time for advocates to send appeal letters to all donors (both existing and lapsed) is during the charitable giving season in the fall. Voices for Virginia’s Children sent their appeal letters in advance of their newsletter release to reach donors and supporters twice. They

SOLICIT

Effective Strategies for Diversifying Funding



also developed and disseminated tailored letters to four different types of audiences: lapsed donors, major donors, potential major donors and individual donors.

Social media.

Organize Days of Giving for donors to make tax-deductible contributions. [Colorado Consumer Health Initiative \(CCHI\)](#) brought in three to five percent of non-grant funding following their “Day of Giving.” Engage online influencers in the area to promote fundraising events. Contact supporters and donors on social media for your events and pay Facebook to promote them. Nebraska Appleseed posted on [social media](#) every day during their five-day fundraising campaign, they talked about how much money was raised and how close they were to their fundraising goal alongside photos of staff and families served by the organization.

Email and phones.

Maximize your reach by utilizing both email and direct mail. [Montana Women Vote](#) sent both direct mail and email solicitations to donors when they launched their successful Medicaid expansion campaign. Tennessee Justice Center (TJC) was able to pull in new donors and saw an increase in the number of online donations and total amount of giving after fundraising via email and social media. Humanize your email (and mail) appeals. In appeal letters, feature stories of consumers that have benefitted from your advocacy work. TJC, for example, included a quote and a photo of a consumer who was able to keep their health coverage because of their advocacy work. [New Jersey Citizen Action](#) and [Universal Health Care Action Network \(UHCAN\) Ohio](#) used [Telefund](#), a phone canvass company, to turn their list of supporters into donors. Telefund produces and sends out materials to help build a base of donors.

Newsletters.

[Alliance for a Healthy Kansas](#) included a fundraising ask in their legislative wrap-up communications to supporters. They focused on agricultural themes to make policy available and relevant to constituents. Hard copies of the newsletters were delivered to supporters, funders and board members with a donation envelope. As a result, advocates increased individual donations by ten percent.

INCREASING YOUR DONORS' LONG-TERM COMMITMENTS TO YOUR ORGANIZATION

Make your donors feel special.

Invite them to rallies, events or meetings. Show them that you rely on their support to sustain your important work. [Colorado Organization for Latina Opportunity and Reproductive Rights \(COLOR\)](#) celebrates “Donor-versaries” by emailing or texting supporters who made their first contribution to the organization during the past year.

Ask supporters to increase their level of giving.

The [Pennsylvania Health Access Network \(PHAN\)](#) motivated donors who contributed \$50 per month to donate an extra \$10 more per month to support ongoing advocacy efforts. They did so by highlighting the stories of families that would be impacted by ACA repeal and Medicaid cuts. PHAN’s board members also asked donors to either match or exceed their previous contribution (for example, calling and emailing donors who contributed \$100 to contribute an additional \$100-150) to help the organization defend families’ access to health care given the political uncertainty of the Affordable Care Act and Medicaid. PHAN was able to double their individual giving and increase donations by 20 percent.

Launch a monthly donor program.

If you have one, use your database program (i.e., Salesforce) to launch a monthly donor program to consistently engage donors (*Don’t have one? Consider getting one!*). Have dates marked on the calendar for reminding and encouraging donors to increase their monthly gift. Send donors annual reports, postcards or newsletters to keep them abreast of your organization’s recent achievements. If you’d find it useful, add a list of donors into your phone bank lists so they’ll be informed of advocacy opportunities for supporters to attend a rally on Medicaid, a hearing on children’s health or an anniversary event hosted by your organization.

Lean on your board.

Develop a fundraising and commitment workplan for board members. Voices for Virginia’s

STEWARDSHIP

Effective Strategies for Diversifying Funding



Children provided new board members with a commitment form and fundraising plan with actions to raise funds. Ask how much individual board members could contribute as a personal gift as Maryland Health Care for All did by requiring a contribution from all board members. Institute a “give-get” policy where each board member commits to either donating or securing donations of a specified amount. During their five-day fundraising campaign, Nebraska Appleseed board members sent fundraising letters and made calls to major donors (donors who contributed \$1,500-\$5,000) asking if they could match contributions to help meet the campaign’s goal of \$25,000. Board members also sent personalized thank you letters to lapsed donors or donors who contributed last year but not this year in order to have them donate during the campaign.

CONCLUSION

Effective Strategies for Diversifying Funding

POTENTIAL CHALLENGES

Little time and capacity.

Advocates may have limited resources and staffing capacity to execute successful fundraising strategies. They may have limited time to follow-up and directly engage with donors who could be helpful in sustaining organization’s advocacy work. Dedicate time and resources to maximize your existing donor and supporter base.

Make complicated work simple and sellable.

It’s so important to continue to educate your donors on what health advocacy is and how your work is making an impact at the local and state level. For example, the Alliance for a Healthy Kansas found it challenging to sell their health advocacy work to donors who were more familiar with the work of direct service providers, such as clinics, in their communities.

LESSONS LEARNED

Engage donors throughout the year.

CONCLUSION

Effective Strategies for Diversifying Funding



With limited time and staff available for direct engagement with donors or follow-up thereafter, it becomes challenging to build and sustain donor relationships. Some advocates have had success by dedicating time and organizational resources to maximize your existing donor and supporter base by leveraging campaign peaks, victories and advocacy threats (e.g., a major health care vote or release of a proposal to slash Medicaid funding) to keep donors connected with your work. This allows you to plot out particular times or intervals when you'll commit to fundraising efforts, allowing you to craft a work plan around them for full integration with your advocacy initiatives. For example, consider integrating your fundraising plans with communications plans or the beginning or ending of legislative sessions for direct connections to existing organizational commitments.

Involve board members and staff.

Effective fundraising efforts include the deep involvement of board members and staff to ensure fundraising strategies are structured, planned and well executed. Learn how board members would like to be involved with your organization's advocacy efforts. Are there specific actions (e.g., filling tables at awards ceremonies or attending receptions) they could take to support your organization? Ask board members about what efforts will help them engage- and tap their own networks- personally.

Lead with storytelling.

Ask an individual to share their story in your materials; be sure to communicate your organization's impact in securing better care for this spokesperson, their family, and their communities. Make your organizational impact heard by featuring consumer stories in print or video. We know advocates often encounter challenges in communicating the necessity of advocacy work absent from direct service work to potential donors. Advocates have shared that you should continue to educate your donors on what health advocacy is in your organizational communications, demonstrating with specific, real-life examples of how your work is making an impact at the local and state level.

We'd like to thank all of the health advocacy organizations that dedicated their time to provide us with examples of fundraising practices that have been effective at sustaining their organization's important work.