

## **Marketing the Movement: Fundraising for Public Policy Organizations**

John Von Kannon  
Vice President Heritage Foundation

Winston Churchill once said "Success is the ability to go from failure to failure with no loss of enthusiasm." When you are involved in fundraising, you will have lots of failures, and you must work hard to keep up your enthusiasm. One way to do that is to study failures, to learn from them, and to avoid making the same mistake over and over again. It's also important to learn from success. Too often, when we are successful, we sit back and enjoy it, and when we fail again, as we will, we are often surprised, and we lose our enthusiasm.

Each public policy organization is different, and what we do at The Heritage Foundation does not necessarily translate into what every other organization does in terms of raising money. But, there are some lessons that do translate whether you need to raise \$5,000 or \$5 million.

### **BELIEF IN THE CAUSE**

This is the number one motivation for a donor to make a contribution. At Heritage, we proclaim the cause in regular communications with donors through our mission statement, through our publications and events, and with everything we do. If you don't define your own mission clearly and in a compelling way, others will define it for you, either incorrectly or in vague terms. When your programs don't live up to their definition, donors won't be motivated to give.

### **RELATIONSHIPS MATTER**

Every single person who has given a major gift to our 25th Anniversary campaign has a relationship with Heritage that goes beyond a donor-recipient relationship. For the most part, these donors are people we knew well before our campaign began. The lesson is: Don't treat your donors like walking checkbooks. Treat them as partners. They are. You reach for your checkbook only when you need money, however, you talk with partners regularly.

### **TREAT DONORS WITH RESPECT**

Our approach has three steps and can be universally applied:

- Understand your own interests and needs;
- Understand the interests and needs of donors;
- And then link those two sets of interests and needs.

How does this marketing approach work?

*Reprinted from the Heritage Foundation's Insider Magazine*

## UNDERSTAND YOUR INTERESTS AND NEEDS

The first step is a good mission statement that you take seriously. This is, in fact, perhaps the single most important thing that you can do for your organization.

To repeat, belief in the cause is the number one motivator to giving. It is up to you to provide a concise, credible, relevant, and urgent description of your cause. It is up to you to have a mission--and state it in the form of a mission statement--and to take that mission statement seriously.

A mission statement for a non-profit is the equivalent of a bottom-line for a for-profit company. A for-profit company hires a new employee or takes on a new project in order to improve the bottom line. A non-profit should do so only if it will advance the mission.

Your mission statement must dominate your thinking and actions, whether you are talking to a donor, an employee, a board member, a journalist, or planning new programs. If you don't have a mission statement to focus your efforts, you won't be as successful. Your activities will be scattershot. And your donors and other markets won't be able to figure out why you exist, or why they should support you. If you don't have a mission statement, write one. If you have one, use it to define and guide your every program.

The second step toward understanding your own interests and needs is a business plan. Your business plan should be the outline of how you intend to advance your mission this year or over a period of years. It doesn't have to be a formal document that you show donors, but it can be. Your business plan tells you who your organization is, what it wants to do, and how you will do it. Briefly, your business plan should:

- Start with your mission.
- List specific objectives that advance the mission.
- List strategies, tactics, and programs that can achieve these objectives.
- List resources needed to do all of this -- financial, physical, personnel, equipment, and a real budget.

## UNDERSTAND YOUR DONORS' INTERESTS AND NEEDS

The mission and business plan allow you to understand your interests and needs. Next, you need to understand your donors. That means research--but not just research from foundation directories and the internet. Get to know donors personally through phone calls, letters, and one-on-one visits. Treat donors with respect. Listen to them. Ask them what they are interested in, why they support you. Talk about your mission. Donors are people. They are not accounts. They are people no matter whether their contribution is personal, corporate, or foundation.

These interests and needs include things like a general philosophical commitment, specific issues of concern, their involvement in their family and community, a desire to make a difference, a desire to have their name on something, or simply the desire to be

with people who share their views. Note that these interests and needs typically don't include having a burning desire to fund your next research product, buy a series of radio commercials, or help you build an endowment. You might get there, but you don't start there.

How do you learn their interests and needs?

Call them on the phone. Go see them in their homes or offices. Invite them to events that show what you do. And make notes on what you said, and most importantly, what they said. These call reports go in your files and can refresh your memory when you talk with them again. They are essential when planning your strategy to solicit them and identifying areas where your interests and needs intersect.

### MATCHING YOUR INTERESTS AND NEEDS WITH THE INTERESTS AND NEEDS OF THE DONOR

This is one of the most interesting and challenging parts of the marketing approach. You know what you are doing and what you would like to do because you have a mission statement, a business plan, and this year's budget. You have talked with your donors and potential donors about your mission.

You now understand that there are two sets of interests and needs to consider--yours and the donor's. You have talked with the donor and involved him in activities when you were not asking for money. You know something about him, his family, and what he wants for the future. You have talked with him about your mission. You have started a program to write him (along with the rest of your major donors and prospects) on a regular basis about your mission, your programs, your plans for the future, and your take on the world--or at least that part of the world relevant to your mission.

In other words you have been marketing your ideas and programs. And all along, you have been working to add new names to your donor and prospect base: by asking current supporters to recommend and introduce you to others, by holding luncheon or breakfast events that discuss the issues you deal with, by conducting a public relations campaign that gets your name in the newspapers, and by sending news clippings to your donors and prospects.

You have prepared the donor for the solicitation. Now, think about what interests the donor. Put yourself in his shoes. Ask yourself, what kind of request for support will meet the donor's needs and interests, as well as mine? This effort to match interests and needs is not just an intellectual exercise; it's an emotional one as well. It involves logic, but also demands empathy. Be honest about this. Don't be like the fundraiser who once told me with great certainty that he always asks foundations to support book projects, because foundations like books. And don't assume the entitlement mentality: just because someone has the ability to contribute and is conservative, he owes you money; or just because a donor made a contribution once, he owes you another.

If your solicitation meets both sets of interests and needs, your likelihood of success increases. Success in fundraising means that you get a contribution that furthers your mission, and your donor gets the satisfaction of meeting his own needs and interests as well.

## UNDERSTAND YOUR-SELF

Research suggests that there are two personality characteristics necessary for a good salesman or marketer, beyond a strong belief in the cause. They are a strong ego and a strong sense of empathy. This is not a usual combination, but it's an important one. If you lack a strong ego, you won't be able to take the rejection--and you will be turned down along the way. And if you lack empathy, you won't understand the needs and interests of the donors, and your failure rate will be even higher.

## SUCCESSFUL MARKETING FOR PUBLIC POLICY ORGANIZATIONS

Believe in your cause and identify donors who share your belief. Craft a mission statement that describes your cause in concise, credible, relevant, and urgent language. Communicate your mission in everything you do. Identify your interests and needs and match these with your donors'. Treat donors with respect in soliciting them for funding and thanking them for their support. Most important of all, think of donors as partners and communicate with them regularly. At Heritage, we have found that in addition to contributions, donors will provide you with a wealth of knowledge, experience, contacts, and ideas that enhance your operation and further your shared mission. And, after all, that's what it's all about.