

Simple Development Systems

*Successful fundraising for the one-
person shop*



Pamela Grow

1st Edition

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For bulk purchases, coaching or webinar information please contact the author at (484)

297-2186 or pamelagrow@simpledevelopmentsystems.com

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Introduction

Back in 2001, I quit my job with one of the Philadelphia region's largest grantmaking foundations to take on a development position with a small community health agency. My task? To create a development department from the ground up.

I don't need to tell *you* that it was challenging!

Thanks to a successful local businessman, this particular organization had run a hugely successful capital campaign just five years prior, raising over \$5 million for a new facility.

And what had they done since?

Nothing. Nada. Not a thing.

Major donors were ignored. Not a single foundation grant proposal had been written in five years. The organization had memberships with a number of key community organizations such as the Chamber of Commerce and the Rotary Club, yet hadn't had any contact with any of them in years. The businessman who had spearheaded the capital campaign was deceased and none of the data from that campaign was available to me. The organization had no website.

The organization's annual membership campaign had been outsourced to a succession of different mail-houses. The resulting product lacked consistency, featured numerous duplications and was extremely expensive to produce (and recipients noticed). Members of the community were angry and the campaign had steadily lost donors and dollars for the past five years.

And the more I dug, the worse things looked.

The closest I'd come to fundraising experience was reviewing the grant proposals at my old job.

Frankly, I thought that I'd taken on more – much more – than I could handle.

I can still recall today how, two weeks after starting and close to tears, I called my best friend and mentor to share with him all the negatives I was uncovering on a daily basis. I had no idea where to start. Talk about a pity party.

His response?

“How many people get to create their own job????”

That was a lightbulb moment for me (*always look for possibilities and opportunities*) and I began to get excited. Next, I mapped out a strategy. A plan for grants, a plan for public relations, a plan for a website (the organization didn't have one), a plan for growing individual donors.

And then I did one of the smartest things I've ever done and something that I continue to do ten years later. It's not something that you'll ever find in a typical “development” course or workshop. But it will make a major difference in your work as you go forward. It's just one of many ideas you'll be “swiping.” We'll talk about it later on in this book.

So what happened?

Fast forward a short 10 months and we had:

- increased individual giving by a full 25%, while reducing costs by 31%,
- raised over \$150,000 in foundation support,
- begun a successful outreach to local businesses, bringing on corporate sponsors such as Whole Foods,
- implemented a number of successful community health initiatives,
- established a weekly column in our local newspaper,

- rebuilt our community relationships and created a new community-wide nonprofit roundtable where organizations met monthly to share best practices,
- launched our first website fully equipped for online giving (and this was in 2001!), and
- begun a major gifts program.

Since then I've gone on to raise over \$15 million in funding and replicated that success with dozens of small nonprofit organizations just like yours.

Are you feeling utterly overwhelmed in your job right now? I won't lie to you. Spearheading a one-person development department *can* feel like you're spinning 10 glass plates in the air. You're the grant proposal writer, database administrator, director of individual gifts, webmaster, event planner, social media director and more! And every day it seems as if "they" - the trendsetters - are dangling more bright shiny objects in front of your face.

Simple Development Systems will cut to the chase, leaving you with the framework to develop a successful donor-centric development plan for your organization. One that will raise the money your organization needs now - **and for the long haul.**

A word: I've noticed that authors of general "how to" books for fundraisers tend to write based upon their own personal experiences. I've had enormous success with grant proposal writing and building relationships with foundation funders. I also simply adore the marketing and communications aspect of fundraising, from developing communications calendars, to writing appeals from the heart, to developing email fundraising and building individual giving. However, when it comes to organizing fundraising events, board training, carrying out the actual "ask" or selecting a database, I rely on others' expertise.

The best fundraisers are those who are always learning, sharing resources and growing. Regular readers of *The Grow Report*, my weekly e-zine, know that I'm a huge believer in sharing the best resources out there. That's why you'll benefit not only from my expertise but from the guidance of a host of seasoned experts who have contributed to *Simple Development Systems* - people like Ken Burnett, John Haydon, Nancy Schwartz,

Jules Brown, Lucy Gower, Mazarine Treyz, Gail Perry, Robert Weiner, Marc Pitman and others.

This book has eight chapters, ranging from how to effectively tell your story, to grants, to stewardship, to events, and everything in between. Many chapters feature short **Tales from the Trenches**. Additionally I've included a number of popular articles from my websites. You'll find the worksheets and templates referenced throughout the book in the accompanying downloadable **Toolkit**. Rather than converting Excel worksheets to pdf format I have left them in Excel format - allowing you the flexibility to modify according to your organization.

I recommend that you read this book in its entirety. After doing that, go back and review it again, spending an hour or so a day with a focus on one chapter. Do the assignments and spend some time on the accompanying resources.

And absolutely set aside some time to watch or listen to the recorded teleseminars and webinars from masters like Tom Ahern, Lisa Sargent, Mal Warwick, and others.

At a mere 110 pages, *Simple Development Systems* is a simple, short read. Don't mistake short for lacking in substance - **or results**. You've got too much on your plate for me to waste your time. Another bonus? *Simple Development Systems* will be revised and updated on a regular basis, and you'll always have access to the latest version.

The intent of *Simple Development Systems* is to provide you with the basic framework to focus on building lasting relationships - lifetime donors - and **reject quick fix thinking**. For those readers wanting more, check out the Resources section directing you to additional reading.

Additionally, because this is an eBook in pdf format, you'll be able to click on links as you read and be directed to the accompanying resource.

Know that wherever you're coming from *you are not alone*. Whether you're new to nonprofit development or a seasoned pro, you can map out a solid strategy for donor-centric fundraising, and succeed! I am here for you. If, at any point in this process, you have questions, feel free to email me at pamelagrow@simpledevelopmentsystems.com and you'll get a personal response within 48 hours.

To your fundraising success!

A handwritten signature in cursive script that reads "Pamela Grow". The signature is written in a dark ink and is centered on the page.

PS: If you're new to your role as nonprofit development director, the following bonus article was written just for you!

Bonus Article

How to Be a Nonprofit Development Director – Charting Your First 100 Days

President Roosevelt, coming into office in the midst of the desperate years of the Great Depression, set the standard for new presidents to make their marks within their first 100 days in office.

And, like FDR, incoming President Barack Obama entered the White House at a time of great crisis with his own ambitious first 100 days to do list.

Chances are, if you're coming on board as a nonprofit development director in today's climate, you too may be facing a time of great instability.

Nonprofits, for the most part, have been hit hard by our nation's economic woes. They're facing challenges in terms of donations, staffing, government and foundation funding and organizational structure.

How can you make a difference quickly, while at the same time setting those important standards for your organization's future sustainability?

Too often, a development director's worth is quickly measured by those without a true understanding of how development operates. Today's grant proposal will more than likely take months, if not a year, to bear fruit. Establishing a successful individual donor campaign will certainly yield immediate results, but the real results may take years.

How can you best approach your new position in those crucial first 100 days?

Begin by giving yourself some time to review what's been done in the past. Hopefully, the grant files will be well organized, the database will be one that you're already familiar with and you can access what has been done in terms of any type of annual appeal and events.

Make a list to determine what needs to be done in each of the following areas:

Grants

Take a look at your organization's 990 or budget for the past three years to determine what percentage of the budget came from grant funding.

Has the organization run any past capital campaigns? Do they have a history of funding from the same funders every year? What efforts have been made to locate new sources of foundation or corporate funding? What is the organization's goal for foundation/corporate funding? What types of relationships does the organization have with their foundation/corporate funders? Does the organization have a grants system in place?

If you've written grant proposals before you may already be aware of prospective regional funding resources. Make it a point to prioritize locating new sources of funding by doing weekly research.

Individual Donors

Who are your donors? Does your organization have any bequest gifts? What are the stories behind those bequests?

Make it a point to create a listing of your top ten to twenty donors. You'll want to speak with them on the phone or meet with them personally within the upcoming 100 days to introduce yourself, learn about their connection with the organization and gather stories.

Don't make the mistake of solely focusing on your top donors.

Query your database as well to find your most loyal donors. These may be individuals who only give \$50 – but they've given every year for the past ten years. Make it a point to write, call or meet with as many of these individuals as well to introduce yourself and show your appreciation. Why have they chosen to donate every year? Capture their stories. These individuals will form the beginnings of your monthly giving club ...

Database

This should be your first priority.

I'm assuming that your organization has a database. Chances are, if you're a new development director working for a smaller nonprofit and you are the sole development department, the database may be nonexistent or a bit of a mess.

Do your best to familiarize yourself with your organization's database, their past protocols for data entry and reporting procedures, their vendor contract – and absolutely set aside time for training if necessary.

Communications

How has your organization communicated in the past? What does their website look like and who maintains it? Is their website current? What types of collateral does the organization have to express their mission? Does your organization have a bequest tagline that is included on all collateral? Is the organization logo prominent on all pieces of communication? Has communication with donors been current or sporadic? Has any effort been made to engage the local press? Do they utilize any social media? Should they?

Begin to outline a strong, consistent communications calendar to retain your donors – and keep the public informed.

Stewardship

Does the organization have protocols on stewardship? What are the guidelines for a thank you letter to a donor? To a corporate or foundation funder? How often are thank you letters changed? When does the Board president or CEO sign the thank you letter? Are thank you calls made on a weekly basis? By whom?

Great stewardship doesn't just happen – and it's your key to lifelong donors and eventual bequest gifts. Make a plan to gather all stewardship materials together and develop a consistent plan for thanking and retaining donors.

Events

Familiarize yourself with past events, if any. How do they relate to the mission of the organization? Have they met goal? What are the expectations for the upcoming year?

Board

During your first 30 days, you should make every effort to introduce yourself to every member of your board of directors, if you haven't already met. Find out what motivated them to become involved with your organization (you're collecting stories again!), what their fundraising goals are, and what kind of communication they'd like to receive from you.

If time allows, meet with each member one-on-one. You'll get a better sense of the unique gifts they bring to your organization.

Staff

Set up short meetings with individual staff members to introduce yourself, learn their role in the organization and discern how you all can best achieve the organization's goals.

Draw out their stories. What made them get involved with your organization? Chances are, it's not just a job to them. What kind of stories have they witnessed firsthand?

Community

Has your organization been involved with any community organizations in the past, such as Rotary, the Chamber of Commerce, Kiwanis, etc.? Who are your state and local government representatives? Does your organization have local weekly or daily newspapers?

If so, make it a point to keep current on the connections. If not, you may want to consider how involvement might benefit your organization. Draft letters of introduction to your State Senator, State Representative and regional politicians. Research membership at your local Chamber of Commerce, Rotary or other community organizations. Compile a press kit and draft a letter of introduction to the editors of your local newspapers.

Your Mission

Probably the most important part about your new job is your organization's mission and how you relate to it. Your strong passion for the goals and values of your organization will be the key component to how well you are able to raise funds.

Whether you're working for a museum, an arts organization, a free clinic, a school, a religious organization, etc., you must be thoroughly grounded and have a strong belief in the mission. Make it a point to learn why your organization was founded, who benefits, and why their services are so important to the community.

Begin to gather your organization's stories.

Wearing the many hats of a one-person development office is challenging! Make your first 100 days count.

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Chapter 1

Let's get started!

First the bad news.

You may have heard that nonprofit development positions tend to run on an 18-month cycle. I know that in my own fundraising career, I've worked in situations where I was the fifth development director in three years. Heck, I can remember being handed a foundation grant proposal to write and being unable to discern from the available files whether the foundation had funded us in the past. As it turned out, the foundation in question had funded us previously, three times to be exact.

Imagine drafting a proposal with no knowledge of the history with the prospective funder!

This topic recently came into scrutiny in a *LinkedIn* discussion and I found one respondent's answers so telling that I turned it into a blog post. Frank Donaldson, President at Institute of School and Parish Development (ISPD) in New Orleans offered up his thoughts on why development staff turnover is so great within Catholic institutions.

1. The leadership of that Catholic institution (pastor, principal, board, pastoral council) does not really understand Development.
2. Everything is measured by the amount of immediate money that "must" be raised.
3. There is no written strategic plan in place with measurable, reasonable outcomes.
4. No training is provided for new DD and for continued professional growth.
5. The DD is hired and the people who have been involved in the past seem to wash their hands of the responsibilities and take the attitude, "I am glad that is out of my court. We finally got someone to handle all of that."
6. The entire effort is simply one fund-raiser after another fund-raiser and the "nickel and dime" mentality never ceases. Total burnout.

7. Too many “guarded kingdom” to overcome and therefore the lack of acceptance of the new DD’s vitality, energy and creativity.
8. Not enough team building on all fronts and this is really all about people engagement.

I think he’s absolutely nailed it – and I don’t believe that these eight reasons are limited to Catholic institutions.

The good news?

You can avoid many of these pitfalls by heading them off at the gate. How? Start by creating a ‘culture of philanthropy’ within your organization.

Perhaps a cliché, but fundraising is ultimately about relationships. And a culture of philanthropy is merely that - an *attitude that embraces relationship building*. Once everyone realizes that fundraising is, in many respects everybody’s job, your organization will be on the path to sustainable funding.

Shift your focus from *money* to *building lasting relationships* and the money will follow.

How do you know that your organization has embraced a culture of philanthropy?

- Everyone understands the need to raise money and is willing to do what it takes to support the effort, regardless of their role in the organization.
- Everyone represents the organization - and everyone helps to identify potential new friends.
- Everyone can articulate a case for giving and how a gift will be used.
- All of your internal processes are donor-centric - that means that they’re set up for your donors’ benefit, not yours.
- You welcome donor visits to your offices and program sites.
- Everyone takes turns welcoming at the front desk and phoning donors.
- Your executive director sees him/herself as the “face of the agency.”
- The executive director is 100% committed and personally involved in fundraising.

- Your organization’s clients and donors are viewed as experts in how the organization carries out its mission and are regularly invited to share their stories.
- 100% of your board members contribute financially.

Are you beginning to get the picture?

What are some signs that your organization hasn’t embraced a culture of philanthropy?

- Your fundraising is constantly in nickel and dime crisis mode.
- Your development staff is paying for their own training and books.
- The responsibility for fundraising is assumed by one or a few people (most often development personnel or your executive director).
- You rely on activities such as special events or direct mail campaigns rather than focusing on a comprehensive strategy embracing diversified funding.
- When major gifts occur, they are usually unsolicited: no one is charged with making the ask and few face-to-face meetings occur for the purpose of cultivation.
- You’ve never surveyed your donors.
- You know that when your founder leaves next month she’s taking half of the donors with her.

Following is an example of one organization that failed to build a culture of philanthropy. Educating their board consisted of scheduling a “fundraising” presentation to their board once every year or so with no follow-up. And a few years back, I was the unlucky consultant brought in for an hour-long fundraising training scheduled during the organization’s one-day retreat. Prior to my presentation, I chatted with the organization’s board president over lunch and was dismayed by the following exchange:.

“Well,” he remarked with more than a touch of resignation in his voice, “we really don’t have an easy mission to sell – like cute animals or starving children.”

Hmmmmm ... red flag alert.

Immediately following lunch, several of the organization’s students gave a short PowerPoint presentation on a community service project trip they’d taken the previous month.

Wow!

What utter joy to watch these kids' faces absolutely light up as photographs of their trip flashed by. For every one of them, this trip had been their first time traveling outside of the United States, and it was clearly a thrilling and eye-opening experience for each of them. And then it was time for questions ...

Utter silence from the board members. In fact, a couple of them had left the room during the kids' presentation and were outside in the hallway on their cell phones. Not a single question was raised. The students had already clearly been nervous about presenting before the board and now, as none of the members appeared even remotely interested in what they had to say, they looked downright uneasy.

Imagine that ... here we were witnessing, first-hand, exactly how this organization was *successfully changing lives*, and yet none of the board members had any questions.

But I had questions. Lots of them. I wanted to know if the kids' perceptions of poverty had changed. I wanted to know if the trip had affected their plans for the future. Always the "foodie" I wanted to know what their favorite cuisine had been. I asked away and was rewarded with an outpouring of enthusiasm (not to mention some inspiring stories) from this terrific group of kids.

And I've got to tell you that this organization's mission certainly looked like an *easy sell* to me and, sad to say, they simply weren't listening. Somewhere along the way, they had lost focus of their organization's own wonderful mission!

Fortunately, that was an isolated incident in my experiences in working with boards, but it serves as a reminder that building a culture of philanthropy *absolutely will not happen overnight*. It takes patience, consistency and commitment. You'll find that the rewards will be well worth it.

And, as the development director (or executive director) you are primarily responsible for building a culture of philanthropy.

Don't ask for permission to lead.

Let me repeat that: Do not ask for permission to lead. Take the reins and be *prepared* to lead your organization's staff, board and yes even your executive director.

Tales from the Trenches

One of my clients, a small but long-established nonprofit, did not understand the concept of a culture of philanthropy. They expected their executive director to single-handedly raise all the money necessary to fund their mission. Because the location of the organization prohibited me from regular board attendance, I looked for a way to provide consistent "culture of philanthropy" reminders to the organization's board and staff members. I found and sent them a simple little tool that, over time, made board and staff fundraising training **manageable**. It's a set of DVDs from Movie Mondays for Nonprofit called [Top 10 Best Movies for Helping Board Members](#). The executive director played one of the 3-5 minute clips from the set at the start of every board meeting, and then engaged his board in discussion. It only took five or ten minutes at every meeting, but resulted in a number of "Aha!" moments as board members were gently led to the realization that they, too, were responsible for fundraising. On their own, they arrived at a number of ways they could assist in bringing in new donors - and help steward the donors we already had.

What are some ways you can begin to lead?

- When you're working on your next direct mail appeal letter, share the letter around your offices and ask program staff members for their advice. You probably won't take it (*don't tell them that but after all, what do they know about persuasive copywriting?* :)), but you'll be educating them to the importance of story-gathering. And people love it when you ask their advice!
- When you receive special "thank you s" from clients, copy them and send them on to board members.
- Utilize a company like Send Out Cards - or keep a desk drawer full of cards like my friend [Shanon Doolittle](#), - to send Birthday, Anniversary or "just because" cards to your board members.

- Schedule ‘Thank-a-Thons,’ where your board members pen hand-written thank you notes to donors. Make it a fun experience by scheduling 20-30 minutes within the course of a board meeting and serving refreshments.
- Spend one-on-one time with board members getting to know them individually.
- At every staff and board meeting share your latest “story,” whether it’s about one of your agency’s clients or about a donor or even about a recent visitor to your organization. Encourage staff members to share their stories.
- Shadow a member of your program staff for several hours or even a day.
- Think outside of the proverbial box. Recently I attended a United Way branding workshop on behalf of a client. Among the participants, I was delighted to see that one forward-thinking larger organization had sent program staff in lieu of marketing or development staff. I spent some time chatting with them and it was clearly an eye-opening experience for them in terms of how they could better share their own work with their development department.

Your Assignment

Schedule lunch with one of your board members or a supporter.

Bonus Article

Remember earlier when we talked about the staff turnover statistics? You’ll be doing yourself and your organization a big favor when you diligently document and create a legacy of your work.

In the following article renowned UK fundraiser Ken Burnett talks about the importance of recording what works (and what didn’t). And, in addition to your organization’s newsletters, direct mail appeals and thank you letters, you’ll want to keep a record of various passwords, data entry instructions and more. Buy a giant binder (buy several) and get into the habit of noting daily, weekly, monthly and yearly tasks. You make it a point to spend 30 minutes on the phone every day calling donors? Take note of it. Perhaps even include a sample script.

Bring back the indispensable guard book

The one thing we didn't guard well was the treasured book itself.

There's lots that I recall with affection from my first fundraising job. But one thing I remember particularly fondly – the good old guard book. And not just because its content was so valuable. I loved its name, because it implied both care and permanence. The title seems to say, 'This is the book we guard. It's a safe place, something permanent and reliable in a shifting world.'

Talk of worth it's weight in gold! Into the safe haven of our guard book we would pour everything we learned about our direct mail and press advertising, carefully preserving it for posterity so that over time we could use it to build a detailed record of what worked for us and what didn't, by how much and when. It was most crucial for recording what we learned from our elaborately constructed (and very costly) series of tests. Testing is of course an exacting and expensive business. It was only by going back to the lessons in the guard book that we were able to secure value for our money.

To be quite honest I was then spending more money on a daily basis on this thing called direct marketing, via press advertising and direct mail, than I've ever spent on anything, before or since. Donors' money too. Money entrusted to me to help some of the poorest people on the planet. I needed to be able to see, in detail, precisely how that money was being spent; which part of it was working best and why. Lord Leverhulme, as head of Unilever Britain's biggest advertiser, famously said that only half his advertising worked; the trouble was he didn't know which half. Not us: we had our guard book. At any given point we could account precisely for what was working. And why. And by how much.

Simply, a guard book is a book or folder for storing copies of published advertisements, alongside which you record each advert's date of appearance, cost, position, special features and response, plus a summary of any other factors that might even slightly influence your results –

competing editorial coverage, significant world events, other ads that might detract from or even support yours. Even the weather would be noted in a good guard book – if it was a hot and sunny day response might go down because people would be outside enjoying the sunshine rather than indoors reading your ad.

At our agency we used to keep guard books for clients. It was easier than encouraging them to keep them themselves. With hindsight maybe this good intention was a mistake, as nowadays if you mention a guard book to most fundraisers they'll look at you blankly. Many charities don't have one and many fundraisers have no idea of what they're missing. Ask them how a particular ad worked and they'll say, 'Pretty well, I think.'

Such imprecision is an admission of failure. Yet for some it's easy to dismiss the guard book as just a quaint piece of nostalgia, a fragment of the old way of doing things. If you feel like that, consider this instructive tale from UK master strategist Alan Clayton.

Alan was working with a major animal welfare organisation. Their direct marketing income from warm appeals was declining. No change in creative technique, copy, or data segmentation seemed capable of halting the decline. So they turned to their guard books, where they were able to review results from five years of warm appeals. They soon noticed something very special. Whenever an appeal featured just animals, it performed poorly; but when it contained stories about bad and good humans as well as animals, it performed well.

Alan says, 'The insight we gained from these detailed records was that the feeling that drove action was anger at the injustice meted out to animals by cruel humans rather than compassion for the animals themselves. So our next appeal featured anger and injustice in a fiery creative treatment. Income doubled immediately. It has stayed at the higher level ever since.'

The difference between anger and compassion is huge. For this audience, anger was an immediate trigger for action. Their action gave donors the feeling of reward and elation. Compassion, on the other hand, just compounded a feeling of hopelessness and despair and therefore discouraged action. The lesson was that the organisation should communicate as an 'anti-human-cruelty' organisation rather than a 'save-the-cute-animal' organisation. A fundamentally different way of saying the same thing.

The crucial thing here is that without the forensic trail from their guard book this insight would have been missed completely.

Bring back the guard book. And keep it safe and up to date.

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