

Relationship Fundraising

A Donor-Based Approach to the
Business of Raising Money

Second Edition

Ken Burnett

The White Lion Press Limited



Foreword by

Jennie Thompson

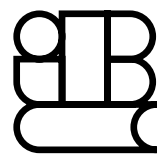
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Foreword

How do you have a relationship with a number? It'd be rather difficult, I would think—not easy to get your arms around. But every day that's how many so-called service professionals relate to us: credit card companies, insurance agents, brokers and banks, stores and airlines, and even a few nonprofits, if we're honest about it.

At some unremembered moment, it seems we lost our names and became records on databases and codes on envelopes. And since that dreadful day when our Social Security number, Zip code, and customer I.D. came to define us, something real has been lost. But it's not too late to get it back.

It's time for us to look beyond the profiled categories, the focus-group assumptions, the characterizations of baby boomers and busters, and look at what is essential in our transactions: the courtesy of receiving information we value, respect for loyalty, and recognition and appreciation for a shared commitment.

Relationship Fundraising drills into the core of our value system to remind us that fundraising is not, most definitely, the science of predictable responses to predictable actions based on hard-and-fast rules of experts. No indeed. In this age of “professionalism”—the era of the marketing guru—it's all too easy to forget that fundraising is more art than science. It is people giving to people . . . the hope of a shared dream . . . the success of a worthy cause. And it will not be effective if we continue to treat our donors simply as computer records within gift categories.

Ken Burnett's book, first published in 1992, set the fundraising world on its ear. Now, with this brand new, updated and expanded edition, he once again challenges the bromides that stand in for experience and the techniques that too often replace substance. And Ken puts his ideas into the context of today's (and tomorrow's) world.

Everyone talks about how the world is changing, and how quickly trends and techniques come into vogue and then fall out of favor. It's the opening sentence in the opening paragraph of most books and most speeches. But it seems to me that too many people in our profession just don't get what this means. My Dad often says, "Not everyone who talks about heaven is going there." Well, I think not everybody who talks about change is really doing it.

In the last decade, since the first edition of *Relationship Fundraising* was published, there has been a growing restlessness about traditional approaches—mostly because the old ways haven't been working like they used to. But we need to look beyond the statistics and realize it's the donors who have changed. They are different now. The techniques and the level of service that worked yesterday may not be effective in attracting and holding onto *today's* donors, who expect consideration—and are determined to get it.

We need to be out there trying new things and taking some risks. Maybe we'll find that it's not so much about *replacing* traditional methods as it is about trying to *supplement* those methods. Whichever it is, it's going to take much more than the color of an envelope, a string of stamps, and a catchy phrase to keep today's and tomorrow's donors involved, satisfied, and committed.

I think what makes this new edition of Ken's landmark book so important is that he challenges our priorities; he asks us to forgo our obsession with techniques and formulas and to rethink how best to connect donors with causes. He asks us to consider the acts of mutual consideration, thoughtfulness, and appreciation—the hallmarks of our better relationships—and then determine how to bring those attributes into our world at work. He reminds us that we are indeed a service industry and all that it implies. And he helps us understand how we can accommodate ourselves to a changed marketplace populated by a discriminating citizenry.

As you examine his very big Point of View (as titled in the first edition by our mutual friend, George Smith), you may find some ideas you already knew but had forgotten; others, you might have put away and never tried, and still others will be totally new. But all these ideas, when examined within the context of our rapidly changing world, can be thought provoking and action inspiring. And they may oblige you to take a second look at what you have been taking for granted.

I am fortunate that my career in fundraising has coincided with the years that Ken launched and built his agency in London. He is, without a doubt, one of the most respected figures in the international fundraising community. Through the years, I have borrowed shamelessly from his writings and his wisdom. And if the direct mail packages from his wide range of clients could have been delivered to my door in Washington, D.C., I would have borrowed even more!

George Romney, U.S. politician and industrialist, once remarked, “There is nothing more vulnerable than entrenched success. You become a prisoner to what you’ve done in the past.” Fortunately, Ken Burnett’s *Relationship Fundraising* has thrown us a key. Just in time.

JENNIE THOMPSON
Chair, The Resource Alliance, 1998–2001

Preface to the Second Edition

I remember clearly the precise moment that I decided to write the first edition of this book. It was on a train coming back from Bristol to London in November 1990 after the Institute of Fundraising's Wales and West Region's annual conference. (The Institute of Fundraising is the professional association that provides training and standards for fundraisers in the United Kingdom, similar to North America's Association of Fundraising Professionals, the Fundraising Institute of Australia, and others.) I was with the institute's director at the time, Stephen Lee, and we were discussing the absence of any good British books on the subject of fundraising. We both agreed there was a gap that needed filling, but I felt what was wanted was a simple, factual guide to how to do fundraising, while Stephen believed any new work should have more attitude, take a ballsier, more confrontational stance, particularly as there was so much going wrong in fundraising at the time, which needed putting right.

I remember this conversation well not just because of its unusual setting, nor because it probably set me on the path to becoming an author (of a sort), but because at intervals during the course of this discussion we were trying to listen to the crackly radio on Stephen's personal stereo, which he held against the train's window to improve reception as we rumbled across the West Country. This was not normal commuter practice. Our interest in the radio that day was the promised announcement of the results in the ballot electing a leader for Britain's Conservative Party, which led ultimately to the ousting of Britain's first woman Prime Minister, Margaret Thatcher. In between bouts of broken reception and occasional excitement from Westminster, Stephen and I

would return to debating the need for a good, up-to-the-minute British book on fundraising, and what shape it should take. So the germ of the idea for what became *Relationship Fundraising* was planted on that train journey, and grew from there. Within about a year the first edition was written. Its almost immediate success on publication rather surprised me and, I suspect, a few others too. Copies were sold in around forty countries and instead of having remaindered copies on my hands the book had to be reprinted twice.

Since then, of course, quite a few other books have appeared from British authors on the subject of fundraising, which reflects the growth of interest and professionalism in fundraising over the last decade and the health and vigor of the fundraising profession. However, the growth of Britain's fundraising book publishing industry has been nothing to match the explosion in fundraising publications on the other side of the Atlantic. Not just general texts, either. You can now get books, and good ones too, on almost any aspect of fundraising, from ethics to the Internet and from major gifts to managing change. Such a wealth of knowledge just didn't exist in the early 1990s.

I suppose my book's claim to special recognition, however, is not just that it was one of the first in the United Kingdom but that it addresses a subject that struck a chord then and still continues to do so. My summary of fundraising practice revolves around a particular point of view, that technology and aggressive marketing may be getting in the way of what really matters to fundraisers, our relationships with our donors, and could even be undermining the basis of trust and confidence that are so crucial to effective fundraising.

So in that first edition I set out not just to review current procedures and practices but also to point toward a better, more sustainable way for the future. Much has moved on since that first edition, and much has stayed the same. But my objectives now in revising and expanding this text are unchanged.

Relationship Fundraising 2: The Donor Strikes Back!

In 1996 a sequel to *Relationship Fundraising* appeared. After five years of sustained and healthy debate generated by its predecessor I wrote *Friends for Life: Relationship Fundraising in Practice* partly as a practical guide to show through real examples how organizations

are tackling the challenges and opportunities that relationship fundraising provides, and partly to show its many doubters that, correctly applied, the original theory can actually enable fundraisers to raise substantially more money than its application will cost. *Friends for Life* features sixteen detailed case histories from fundraising organizations from the United Kingdom, the United States, and Canada. As well as illustrating the problems and the pitfalls, these stories show how relationship fundraising can be made to work and the substantial benefits it can bring. Extracting the lessons from these cases was an instructive yet sobering experience, because although I was undoubtedly able to report success and to show that relationship fundraising does work, much of that success was also partial, half-hearted, and transient, the result of a flaw not in the concept but in its application. And I was presenting the stories of the best. What about the rest? I came to realize that initiatives to develop a donor-based approach were stalling and ultimately failing because the organizations behind them were not fully committed to the concept and so were failing to invest the time, people, and resources necessary to ensure success.

The Choice

In the spring of 2001 I had to make a choice. Copies of *Relationship Fundraising* were running low again, so I had to decide either to print the book as it was for a fourth time or allow it to die a natural death. There was another option. I could update and reissue my book to ensure it stayed as relevant as possible to a new generation of fundraisers in a new millennium. That's what I chose to do, mainly because even after ten years I still get correspondence on the book, still get invited around the world to give seminars based on its theories, and still have people telling me that despite its age most of the original text remains as relevant as it was when written, if not more so.

For this new edition I have adopted a policy of not changing anything unless I've had to. So the only changes I have made have been to update or add knowledge that wasn't around at the time, to correct a few instances where time has proved me wrong (and to comment on some where the original has been proved right), and to add pieces of new information that now feel right for this book. But it has not been a simple text revision. So much has

changed in the fundraising world over the past decade that I found the original book needed quite extensive surgery. The result is two completely new chapters and substantial revision and addition.

I've also added a new ending, and should explain why. In a quotation reproduced on the sleeve of the first edition, Giles Pegram (appeals director at Britain's National Society for the Prevention of Cruelty to Children) prophesied that "the ideas contained in this book will revolutionise fundraising in the next decade."

I'm sorry to say his prophecy was only partly fulfilled. Certainly the last decade of the twentieth century did see concepts of relationship building very much in vogue among fundraisers around the world, and I'm sure my book played a part in this. The mantras of being "donor-led" and "customer-focused" became fashionable and commonplace, as did ritual denial of mass marketing and denouncing of the blunderbuss approach to communication. Concepts such as donor care and customer service were enthusiastically embraced by fundraisers in conference halls and workshops, if not in their daily fundraising practice. Nevertheless throughout this period the volume of fundraising communications still mushroomed while their diversity remained fairly static and their relevance frequently questionable. Donors have become much more exposed to and more concerned about their role as targets for inappropriate, indistinguishable requests from fundraisers.

Please Note

This is not intended to be an expert work. I am not an expert, and I am rather anxious not to become one—ever since I realized that Noah's Ark was designed by an amateur and the *Titanic* was designed by an expert.

Fundraising is delightfully free of experts. Most people in fundraising, even those who are very long in the tooth, are only too ready to admit they haven't seen it all. I am lucky enough to have been involved in the business of fundraising for a comparatively long time. I am further fortunate to have worked alongside many of the world's best and most experienced fundraisers on a wide range of promotional projects for virtually every type and shade of fundraising organization. I have had at least as many dismal failures as spectacular successes and the majority of the rest

have been somewhere in between—quiet, unspectacular little money-earners. So this book is also not a scholarly work. It is a practitioner’s observations. Parts of it may be controversial. You may disagree with some of what I say. If so, please let me know.

It is also not complete. My fundraising experience does not include much that’s worth saying about several specialist areas of fundraising—special events, corporate fundraising, local activities, volunteers. That’s why you won’t find much about these areas in this book—it’s not because I don’t think they are important. I wish I did know more about volunteers, because that seems to me to be an area of enormous potential for the organizations we work for and for the good work they support. People who give their time are in every way as important as people who give their money. Their gift of time can achieve every bit as much as a financial donation. I have been a volunteer myself and I find it a richly rewarding experience. So I know that here again there is a two-way relationship where both volunteer and cause can benefit. I hope that some of what I say in this book will also apply to volunteers and that those people whose job it is to encourage and coordinate the efforts of volunteers will find at least some parts of it useful.

Inevitably there is a large amount of overlap between chapters, although I have tried my best to limit it. The subjects I am writing about—donors, research, marketing, communications, dangers, opportunities, and so on—are not isolated compartments and each in some way or other inextricably involves most of the other subjects. Consequently, editing out duplication is not only difficult but often impossible. I have tried to remove the more obvious areas, save those where a bit of repetition is justified by the importance of the subject.

Also, of necessity, I have assumed that you, the reader, have a reasonable knowledge of the major areas of fundraising. As a result, I haven’t sought to describe the basics of fundraising marketing such as direct mail or press advertising, in absolute detail.

One Word or Two?

One of the great fundraising mysteries, still unsolved, is to do with the very word *fundraising* itself. How should it be spelled? Is it *fundraising* or *fund raising*? Or is it hyphenated?

I think it is one word to describe one area of activity and that is the style I shall use in this book. Many others hold an alternative view. There is no obvious solution so not surprisingly a further group, no doubt confused, uses all three forms with seeming abandon. The *Oxford English Dictionary*, source of arbitration in such matters, is not much help. Until recently it didn't even mention us. Now it does, but as two words, hyphenated. I'm pleased that *fundraising* as one word now seems to be winning, as the style most widely used.

Outline of the Book

If I have missed anything important while preparing this book, I apologize—and trust you will let me know so I can put it right in the future. For further information on a wide range of fundraising and marketing subjects, please refer to the Glossary and the Bibliography at the end. Although as I write I have pictured my audience beginning at the beginning and reading eagerly and transfixed through to the end, you may well find specific topics of such interest that you wish to go directly to them. If you paid for this copy of my book, then that's surely your prerogative. Here then is a brief summary of what each chapter has to offer:

Chapter One is essentially an introduction to the field of fundraising as I see it, to lay the groundwork for a shared understanding of the topics discussed in subsequent chapters. It concludes—as do all the chapters—with a list of action points, which I hope you will find useful as convenient *aides-mémoire* to enable you more easily to put relationship fundraising into practice.

Chapter Two considers the public's attitude to fundraisers and fundraisers' attitudes to themselves. It shows how important fundraising can be and reviews the range and scale of opportunities that confront today's fundraisers.

Chapter Three sets out in detail the essential foundations of fundraising. It describes why people give and what makes a successful fundraiser.

Chapter Four offers a definition of relationship fundraising as a philosophy and illustrates what it can do for you. It describes the nine keys to building a relationship and considers one fundraising essential that is the cornerstone of relationship fundraising.

Chapter Five reviews what donors want. It looks at the positive and negative aspects of research, introduces “the golden generation” and the donor of the future, and considers the importance of trust, faith, and pride.

Chapter Six looks at the body of general and academic research that has grown up over recent years and considers the significance of donors’ trust and confidence, as well as why it is important that you should strive to stay ahead of your competitors.

Chapter Seven is about making—and avoiding—mistakes. It begins with the recognition that fundraisers are no less fallible than the rest of the population, and it works through the major pitfalls and the ways to bridge or avoid them.

Chapter Eight takes us from mass marketing to individual relationships, describes the marketing plan, targeting, segmentation, the five marketing P’s, how to create the right image, and how to use the telephone creatively. Through these it shows how the culture of fundraising can positively influence, direct, and control the culture of marketing.

Chapter Nine is all about keeping your friends and making donors feel special. It shows how much more cost-effective it is to develop relationships with existing friends than it is to have to find new ones, and it gives practical advice on how to retain, recognize, and reward your existing donors.

Chapter Ten outlines the myriad ways in which we now choose to communicate with our donors. It offers lots of practical advice on ways to be much better at it.

Chapter Eleven is all about recognizing opportunities and getting the best out of people. It outlines a variety of ways of offering donors real involvement in your organization’s work and mission and describes a range of practical opportunities you might introduce to boost your fundraising performance and strengthen your relationships with donors.

Chapter Twelve looks in detail at the fundraiser’s Aladdin’s cave, bequest marketing, an area of vast potential where those brave enough, creative enough, and early enough might discover the keys to the last great opportunity to help a donor influence the world.

Chapter Thirteen is all about change. It reviews a wide range of recent developments in fundraising including a few controversial new challenges, and offers some thoughts on future change.

Chapter Fourteen concludes the book with a little crystal-ball gazing, and comes up with some serious threats to our future which you can consider alongside a raft of genuinely exciting opportunities. It also shows why preparing suitable strategies for both will be time well spent.

Fundraising—and especially relationship fundraising—is all about individuals rather than groups. To bring this concept to life, after each chapter I pause to introduce and profile a specific donor—one composite but readily identifiable individual who demonstrates a part of the spectrum of possibilities that every donor presents. Their purpose is to remind you that donors are all different and that each represents an opportunity. Make of them what you will. As you prepare your fundraising appeals, picture how these people, and others you have met, will react to them; you may well form a clearer idea of the persuasiveness of your work than you can by reading it from the fundraiser's point of view.

Some Closing Remarks

For many years the closing remarks at the International Fund Raising Congress (the gathering of professional fundraisers from around the world that takes place each year outside Amsterdam, in the Netherlands) were delivered by Guy Stringer, formerly director of Oxfam, one-time senior executive with a major manufacturing company, and now one of fundraising's most eminent and respected gentlemen. He has more experience of and insight into the power and potential of fundraising than most of us are likely to achieve in a lifetime.

As Guy addressed the several hundred delegates, who had just survived three intensive days learning at the frontiers of the art and science of their profession, he sought to remind them of the larger purpose of being there. Techniques and skills are limited without a clear purpose, he told them. To remind fundraisers of what it's really all about Guy used to recount some stories from his own long experience designed to send the delegates off with their spirits soaring and sights set high. He invariably succeeded, because he knows what makes good fundraisers tick.

With Guy's permission I'll relate two of his stories here.

Who Am I?

Surat is a town in western India and the last time that I was there I arrived by train. You come out of the station and walk across a square, up a long hill and down a lane, where at the top, on the left-hand side, there is a leprosarium. It is run by sturdy Catholic sisters, some Indian and some Spanish. I arrived late at night and was quite tired and would have preferred to have thrown a bucket of water over myself and lain down. But Sister Mary insisted that I walk round the leprosarium with her and I have found it a mistake to disagree with Catholic sisters.

So round we went and to my astonishment there were little collections of people sitting round hurricane lamps on the ground, and I said to the sister, "What are they doing?" She said that the young patients were teaching the old people to read and write. And so they were—with the children saying, "No granny, you don't do it that way but like this." The only things that Oxfam had provided were the slates, the chalk and the little hurricane lamps.

When we got to the gates of the leprosarium I saw they were closed, but in the gloom you could see on the far side a little gang of people and the sister said to me, "Guy, open the gates." I did so and a family carried in a man. The sister led the way and they put the man on a table in the clinic. If they had put him on the ground he would have fallen down because his legs stopped at his knees. The sister knelt down and looked at the patient and she said to me, "There are worms in his wounds," and I looked and there were. Then a strange thing happened and it was rather like a camera going click, click. I could see who the sister was, she was somebody who could bring effective help to the patient. And I could see who the patient was, he needed help and badly. But who was the third person in the frame, in a Marks and Spencer sweater, size 40, do not boil. How did he fit?

The deduction from this of course is that if you are to be concerned in trying to help the poor, the handicapped, and the deprived you must be totally involved. You must try to project in what you write and say in your advertisements and public addresses the courage of the people, their determination to advance the lives of their families, their responsibility one to another, and you must never at any time undervalue them.

Flying a Kite

El Salvador has probably the worst record for human rights in the world. It is a tiny country the size of Wales, but people are murdered at night and if you wish to see your friends again you visit the city rubbish dump and there you will find their bodies. That's where they are battered to death. As a result a large number of families are in church refuges where they live under the care and defense of the church, because if they left these places they would end up, as so many others do, outside the city.

I visited one with about two hundred families and hundreds of tiny children. It was a classic demonstration of the ability of women because the place was immaculate. I would have got it in a muddle in five minutes flat. There was only one small piece of land open to the sky, which was surrounded by a very high wire fence. The children congregated in masses on this tiny piece of playground—the only bit of open air to be found. And they were making paper kites with newspaper, little bits of stick, and some string. But of course if you fly a kite you need wind and you need some space and the children found it extremely difficult to get their kites off the ground. The result was that the big wire fence was simply covered with battered kites.

Eventually I left to go, walked out into the road, looked up and down—it is always wise in El Salvador to see who is about—and walked down the road to turn right at a corner at the bottom. Before I did I turned round and looked up and two little kites had cleared the fence and were lifting up jerking bit by bit into the dark blue sky. Some people would say that this is just some string, a bit of newspaper, some little sticks, and two little boys, but in fact it is more than that. It is a triumph of the human spirit over the grim environment in which so many dwell.

You came here to learn about fundraising and will have learned much about new techniques and skills in your time here. I hope you have enjoyed it, but do not forget that techniques and skills themselves are limited. What you must do is to stand up and encourage and develop a vision of a new society in which all of us may dwell in peace and harmony.

In quoting Guy's words I can't invoke the sincerity and passion of his delivery or recreate the emotional charge in his voice that ensured there wasn't a dry eye in the house. Guy's stories were

magic. They gave fundraisers a lift and reminded us that our profession is more special than most other trades or businesses. For me, that made Guy's closing address perhaps the most important part of each year's International Fund Raising Congress.

Fundraising is more than a job. In the right hands, it is a powerful force for change and while that change is under way it should be an inspirational beacon of hope. Fundraisers have good reason to be proud of their profession.

In producing this new edition I aim to do more than just amplify and reinforce the wisdom of a relationship fundraising approach and so strengthen the position of those who believe it right for their organization. I hope to show that both for the prosperity of our organizations and for the long-term health and viability of the nonprofit sector, fundraisers have to start taking relationship fundraising more seriously. The investment of time, people, and money in building mutually rewarding and beneficial relationships with donors is not just prudent, it is essential. Our futures depend upon it.

Kermarquer, France
May 2002

KEN BURNETT

