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WildWomanFundraising.com

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# *Introduction*

Thank you so much for being part of the Advanced Annual Reports for Fundraising eCourse!

What are we going to be talking about this week?

This week we're going to talk about each piece of your report, step by step. You'll learn what to put in your annual report, including;

- How to gather stories from program staff
- Ways to write a letter from the director that doesn't suck
- Talking about programs without putting your donors to sleep
- Donor listings that are meaningful to donors
- Staff listings that are fun to look at
- Stellar calls to action for your annual report

It can drain you of energy to procrastinate on writing it.

**Here's a secret only the pros know.**

Waiting for inspiration is for amateurs. Don't wait for inspiration, write now!

Let's get going!

# *How to gather stories from program staff*

THIS CAN BE LIKE PULLING TEETH!

Argh!

How can you get program staff to share stories with you?

They are looking at you suspiciously, like you're some sort of marketing liar that just wants one thing from them, and then you're going to go away and make up a story about it!

How can you get around distrust or evasion with program staff?

Sometimes, for program staff, sitting at a desk piled high with papers, in front of a blinking screen, we wish the interviewer would just go away, because our office reminds us we have so much work to do. You're distracting them from their work!

When it comes to chatting with program staff, I like to take them out to coffee or lunch.

The start of every good story is a good, open-ended question. Try to give them enough time to think and to respond.

To prepare for this meeting, print out the questions you want to ask, and then leave space below them for your notes on the conversation.

No matter what, before you publish the annual report, make sure the program staff person agrees with what you wrote, because the last thing you want is to misunderstand what they said and have that mistake be a permanent part of your organization's history.

Here are some questions to get you started:

- When did you start working here?
- What surprised you about this job when you first started?
- What do most people assume about what we do, that is wrong?
- How do you start working with a client?
- What stages does a client go through?
- What do most clients need?
- What can go wrong if a client is not being served by our nonprofit?
- What makes a client succeed in our programs?

- Have you ever had a client who exceeded your expectations?
- Have you ever had a colleague who really went all out for a client?
- Is there something you did with a client that you wished people had noticed and appreciated?
- What services do you think we should start offering in the future, based on the needs you have noticed with our clients?
- Do you have any before and after pictures of when we worked with a client?
- Could I sit in on a call with a client sometime?

#### Additional questions for a non-human services nonprofit

- What do most people forget about our services?
- What do you think is the most important part of what we offer?
- Why do you feel this mission is so important?
- When you sit back at the end of the day, what makes it all feel worth it to you?
- Do you have any before and after pictures of when we (cleaned up a stream)?
- Could I come and watch you in action sometime?

## ***Staff Interview Worksheet***

Who I will interview: \_\_\_\_\_

When I will contact them: \_\_\_\_\_

Questions I will ask:

When did you start working here?

What surprised you about this job when you first started?

What do most people assume about what we do, that is wrong?

What do most people forget about our services?

What do you think is the most important part of what we offer?

Why do you feel this mission is so important?

When you sit back at the end of the day, what makes it all feel worth it to you?

Do you have any before and after pictures of when we  
(\_\_\_\_\_)?

Could I come and watch you in action sometime?

# ***Ways to write a letter from the director that doesn't suck***

Here's a letter from the board chair in my first annual report. He wrote:

***“Who pays for domestic violence?”***

*When we hear stories of domestic and family violence we know survivors pay a huge price. The isolation, humiliation, disbelief, and depression that a woman experiences can be painful beyond our understanding. Yet, while she suffers directly, there are also hidden costs to our communities.*

*A significant social cost is paid by family and friends of the survivor. Social and family associations can be cut off without any explanation. Employment and neighbor relationships may suffer as the need to start over drives some survivors to new communities.*

*Domestic violence also has a significant financial impact on businesses. Seventy percent of employed family violence survivors reported being harassed at work last year. Increased health care utilization, absenteeism, loss of productivity, and retraining needs are a few examples of the additional cost of domestic violence to business.*

*Who pays the biggest cost for family violence? My own personal belief is the children! Certainly friends, family and employment relationship suffer, but it's the children who have no choice or defense. Without intervention, children often carry the scars of domestic and family violence for a lifetime.*

***One out of eight women will be abused this year by an intimate partner! Children, family members, coworkers, friends.... there are many who are affected by family violence. This ripple effect extends throughout the community the more we keep silent about it. If one person speaks up, then more will add their voices.***

*Yes, we all pay for domestic violence.*

***Here's how you can help:***

***Talk about domestic violence: break the silence!  
Check on your friends with compassionate questions  
Write a check to this nonprofit.***

So... there are a few problematic things about this letter.

- There's no clear audience. Is it business owners? Is it a community member?
- There's a lot of statistics but no story.
- There was no graphic to go with the statistics.

- It's at a distance from domestic violence.

### How could this letter be improved?

1. Make a conglomerate story from several people that the board chair interacted with.
2. Decide who the audience is and work to make something they can identify with. If it's for business leaders, talk about the cost of DV for business, and
3. Share a business leader's story with their employee.
4. If you're going to quote statistics, SOURCE THEM. Are these national statistics? Regional? City statistics? You're much more believable when you say where you're pulling your numbers from.
5. Figure out what action you want people to take and make that the one thing you focus on. Don't give people a menu of things to do. One thing is a good thing.

My next annual report I did had not one but TWO letters from the board chair AND from the CEO. They were also problematic. I won't quote them in full, but look how they start.

Here's the first sentence from the board chair:

*“During 2007, X nonprofit continued to build upon the community support and financial strengths that have become hallmarks of the organization”*

Can you say YAWN?

What would have been better? How could we have improved it?

*Grade level.*

The grade level of just this sentence is 15<sup>th</sup> grade level. It should be a 6<sup>th</sup> grade reading level.

*Stories*

It could have been a story from the board chair about his time in the army and why it taught him the need for our nonprofit. It could have been a story about why he got involved. It could have even been his interaction with someone from our tutoring programs, sharing what the nonprofit's program had done for her. Even sharing her smile as she showed him a report card with an A on it for the first time. But instead it was all corporate speak. Speaking of which,

*Avoid Jargon*

This sentence just said a lot of things without really saying anything. And the rest of the letter was no better.

And the CEO message was EVEN WORSE! Here's the first sentence from the message from the CEO.

*“While the X nonprofit has continued its growth over the last year, expanding its educational offerings, reinventing its employment program, exploring opportunities in economic development and working tirelessly in effective community advocacy, we are continually challenged to be ever more creative in the leveraging of our modest resources with a burgeoning community need.”*

How could we have improved THIS sentence?

*Break it up.*

It's trying to do the work of three or four sentences in one.

*Readability*

It should have been put through a readability score tester, like <https://readability-score.com>. If we had put it in this website, it would have showed us a readability score of -20.9. And an average grade level of 28.2. The readability is astonishingly low. And the grade level is ridiculously high. It should have been a 6<sup>th</sup> grade reading level.

*Gratitude*

He could have just started with a simple THANK YOU. Thank you for reading, thank you for caring about X nonprofit, Thank you for supporting us. But he didn't.

Again, this is not the most inspiring or easy to read first sentence in the world. But neither board chair or CEO were given any direction from me about how their letters should read.

So before you go to the CEO or board chair and tell them to write their letter for the annual report, why not sit down with them and discuss the idea of you writing it for them?

Talk about who the letter should be directed at, and what the letter will say, but most of all, talk about the importance of grabbing the reader from the first sentence and starting to share their enthusiasm with the community.

Here's [an example of a good letter](#) from the President, Premal Shah, and the CEO, Matt Flannery, of Kiva.org.

**At Kiva**, the community isn't separate from the organization. The community is the organization. So this report summarizes our collective achievements last year. In 2012, we strived together to alleviate poverty in some of the hardest areas to reach in the world, and to create opportunity close to home. We're happy to report that we're making progress, although we're just beginning.

The spread of information technology opens up a world of opportunity for Kiva. Last year, we initiated a number of new partnerships: we partnered with schools, green energy providers, artisan co-ops and more. We're pleasantly surprised by the reaction of our lenders who rapidly funded these new loans, helping us grow our loan volume by 25% as we innovate.

Another innovation worth noting is Kiva Zip, an effort to lend directly to entrepreneurs through mobile money and electronic payments. Relying on a network of 'trustees' who endorse borrowers based on their character, Zip transfers funds instantly at 0% interest. So far, so good. Zip just crossed the \$1 million mark while maintaining an 85%+ repayment rate, but we'll continue to experiment and we hope you'll join us.

On behalf of the 1 million+ Kiva borrowers around the world, we want to say thank you for being part of this journey.

*Matt Flannery & Prenal Shah*

See what I mean? Gratitude focused, short sentences, short and sweet letter. Real signatures. And it sets the stage for the message of the whole annual report, which focuses around the achievements brought about through their donors.

If you want to see some stories from a director that actually help the cause get more donors, read a letter from Wayne Pacelle's [blog posts](#). He is the CEO of the Humane Society of the United States. I have literally been moved to tears by a story from this man.

Here are their [top 13 transformational achievements in 2013](#).

If you'd like to see their most engaging/controversial blog posts from 2013, there's [a list here](#).

There's also [a section on the HSUS blog called "Talk back"](#) where they add comments from people about why they support the cause.

Here's [a personal story about Lenox Barnes](#) from the Washington Humane Society. It is written to help move people to anger, to do something about this.

## ***Letter to the Director Checklist***

	Does it say thank you at least once?
	Does it communicate gratitude in other ways?
	Does it tell a story?
	Does it have a 6 <sup>th</sup> grade reading level?
	Does it grab you with the first sentence?
	Does it set you up for the theme of the rest of the annual report?
	If it has statistics, does it cite sources?
	If it has statistics, is there an image to make the statistics relevant?
	Does it have a real signature from your director?
	Does it have a way to get in touch with your director at the bottom?

# ***Talking about programs without putting your donors to sleep***

What is a sample of content that puts donors to sleep?

I am going to read to you directly from my first annual report. Please try to stay awake.

*“Our two shelters, Evergreen and Haven House, are the hub of many of our services. Here we provide: safe shelter, case management, support and self-care groups, safety planning, counseling, children's program services, and the crisis line.*

*Women and children come to Evergreen, our 30-day emergency shelter, from a wide variety of situations. Some have housing that is not safe to return to, others have lost their housing due to domestic violence. Some participants are employed and we support their need to continue their work; others set goals of finding employment within their stay at shelter. Case managers at Evergreen individualize the services we provide and support program participants in meeting the goals they have set for their shelter stay. From there, many women move on to Haven House, our bridge program where they may stay for up to four months.”*

What's wrong with these two paragraphs talking about our shelter programs?

WELL... they were copy-pasted out of a grant application, number one.

But number two? THIS IS SO BORING.

And it's at an 11<sup>th</sup> grade reading level, though it does have a 57 out of 100 readability score, who would be patient enough to sift through all of this crap?

How could we improve it?

There's a story, way down in the fourth paragraph, that I didn't copy out here for you. I would LEAD with that story. Then that story acts like the slippery slide to help you keep reading the rest of the article.

Here's that article talking about our programs, rewritten.

## **Sara was scared.**

Her partner, Bobby, was lashing out at her, becoming more controlling and violent. Every night, he would hit her again and again.

Sara would see his car in the driveway and start to feel physically ill. She knew she had to escape, but she had a 6 year old son, Jared, with special needs. And she was worried how she would be able to afford an apartment without Bobby's income.

One day, she plucked up her courage and applied for a temporary restraining order against Bobby. But he continued to come to her house to threaten and harass her. Eventually her landlord evicted her for having the police come to the house so many times.

Sara had thought about coming to our shelter but was worried that the shelter wouldn't accept her son's service dog. After she called and asked, we assured her that we would take her dog, and she started down the road to our confidential shelter.

Sara walked in the door at Evergreen, our 30-day emergency shelter, and burst into tears. She was so grateful to have a safe place to come to, but so afraid about what the future might bring.

The first few days she was at shelter, she slept and slept, because it hadn't been safe to sleep at home.

In her first week at our shelter, she got a case manager to help her start down the road towards employment, and permanent, safe housing for her and Jared.”

This has an average grade level of 7.7, and a Fleish-Kincaid readability score of 75 out of 100. What do you think?

Is this more exciting than the first two paragraphs?

## Why is it exciting?

Because it has the one thing that makes a story.

Conflict.

It has a protagonist, an antagonist, and the protagonist trying, desperately, to solve a problem that cannot be solved on her own.

We squirm along with her as she tries and fails to solve her problem. Then we feel relief with her when she enters the shelter. We start to identify with the protagonist. We start to understand the barriers that prevent someone from leaving an abusive situation, as well as the barriers that prevent them from immediately taking action to improve their lives once they are at shelter.

Does this give you ideas for how to write about your programs in a more engaging way?

### **Advanced storytelling about your programs for fundraising**

If you wanted to take this story one step further, and make it even MORE compelling to get donors to give, you talk about what happens when your nonprofit is not there.

Does Sara die? Does Jared die? Do they end up homeless? How can you make it clear to your readers the consequences of not giving, even in a simple description and story about your programs?

# ***Story Worksheet***

Who is the protagonist? \_\_\_\_\_  
(Is it a person? An animal? Remember, you can protect confidentiality by making a conglomerate story)

Who is the antagonist? \_\_\_\_\_  
(Can be a person, a societal breakdown, pollution, something else)

What is the conflict?

What action does the protagonist take to resolve the conflict?

Why doesn't it work?

How does the conflict get resolved?

What does your nonprofit do to help resolve the conflict?

*Take it to the next level:* What bad thing happens if your programs are not there?

# Values worksheet

Values provide the WHY behind the actions in your programs. A value is just a roadmap for action.

Here's where you can start to see the values that make your nonprofit truly unique. Values that we fail to reflect in our behavior are ultimately empty. Here's a values checklist from the book, *The Power of Full Engagement* by Tony Schwartz and Jim Loehr. Which ones are the most important to your nonprofit?

- |                    |                    |
|--------------------|--------------------|
| Authenticity       | Happiness          |
| Balance            | Harmony            |
| Commitment         | Health             |
| Compassion         | Honesty            |
| Concern for others | Humor              |
| Courage            | Integrity          |
| Creativity         | Kindness           |
| Empathy            | Knowledge          |
| Excellence         | Loyalty            |
| Fairness           | Openness           |
| Faith              | Perseverance       |
| Family             | Respect for others |
| Freedom            | Responsibility     |
| Friendship         | Security           |
| Generosity         | Serenity           |
| Genuineness        | Service to others  |

Values fuel the energy on which purpose is built. They hold us to a different standard for managing our energy.

Now that you know what your values are, how are these borne out in the actions of your nonprofit in the past year?

Our values are \_\_\_\_\_, \_\_\_\_\_,  
\_\_\_\_\_ and \_\_\_\_\_.

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This is a truncated version of [Advanced Annual Reports for Fundraising e-course](#). If you would like to learn more about this e-course, just [go here](#).

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