Engaging Donors With Powerful Storytelling

DMA non-Profit Conference March 2012

#### **Today's Presenters**

**Tiffany Neill**, CFRE, Partner Lautman Maska Neill & Company

**Lisa Schneider-Friedman**, Director of Annual Campaigns, Hebrew Home of Greater Washington

**Betsy Wason**, CFRE, Vice President of Development Physicians Committee for Responsible Medicine (PCRM)





### **Today's Presentation**

- Using Stories to engage your donors
- Channels and themes
- Case Study: Hebrew Home of Greater Washington
- Other Examples
- Case Study: PCRM

### Using Stories to Engage Donors

- Makes your work come alive
- Forms a one-on-one connection between donor and outcome
- Can express gratitude and impact of contributions
- Useful at every step of the donor pyramid



### Hebrew Home of Greater Washington: Fundraising Through Storytelling

#### Lisa Schneider-Friedman

Director of Annual Campaigns Hebrew Home of Greater Washington



A Charles E. Smith Life Community

- The Hebrew Home of Greater Washington is the largest, long-term skilled nursing facility in the mid-Atlantic region.
- 71% of our residents are Medicaid recipients.
- Our fundraising appeals focus on the budget shortfall due to lagging Medicaid reimbursement.
- We use storytelling about actual residents and their lives at the Hebrew Home to personalize our message.
- We tailor the storytelling to serve the objectives of the different "touches."

	Objective			
"Touches"	Cultivation	Solicitation	Stewardship	
Acquisition Letters	х	х		
Donor Renewals		х		
Thank You Letters and postcards			x	
Donor Newsletter			х	
Lessons of 100 Lifetimes			Х	
Video			Х	



A Charles E. Smith Life Community

### **Hebrew Home of Greater Washington**



Established 1910

•Mission: to pay room & board for homeless, elderly Jews

•Row house purchased in 1914 in Washington, DC housed 10 people



# Growing to meet the changing needs of the elderly

- Serving 1,000 seniors daily
- Charles E. Smith Life Communities Campus in Rockville, MD
- Independent Living, Assisted Living, Rehabilitation, Long-Term Nursing care
- New Memory Center





## Acquisition

- Two acquisition mailings a year.
- Letters to prospective donors highlight the Hebrew Home's skilled nursing care, religious services and need for charitable support.
- Letters also tell the moving story of the founding of the Hebrew Home by Hymen Goldman, who after meeting with a homeless, elderly man, collected nickels and dimes to pay his room and board at a widow's home.



# **Donor Renewal**

- Six appeals a year to our house file.
- Residents' stories emphasize the theme and message of each appeal.
- Passover appeals profile residents for whom religious services and kosher food are important or essential to their emotional wellbeing and feeling at home.
- For an appeal in which we highlighted our rehabilitative services, we profiled a resident who couldn't walk on his own until moving to the Home and receiving intensive physical therapy.





#### HEBREW HOME OF GREATER WASHINGTON SMITH-KOGOD & WASSERMAN RESIDENCES

A Charles E. Smith Life Community

January 4, 2012

Office of Development

Mr. and Mrs. Sidney Schneider 6121 Montrose Road Rockville, MD 20852

Dear Mr. and Mrs. Schneider,

"I am so appreciative of the good care my father received at the hands of his care-givers. They are all so caring and kind, and treat him with humor and respect."

"My mind is at ease knowing you are there."

I am sharing these comments with you because they are not only intended for the staff of the Hebrew Home, but for you as well. Thousands of family members rely on the Hebrew Home to meet the medical, social and spiritual needs of their spouses, parents and even children. We appreciate your generous contribution to the Hebrew Home of Greater Washington. Your donation makes it possible for us to provide outstanding care to our community's most vulnerable citizens.

As the Hebrew Home enters its second century of service, our residents continue to benefit from the reassurance of 24-hour nursing care from our highly skilled staff, led by our six full-time physicians, while their social and spiritual lives are enriched through a variety of cultural and recreational programs. As another family member wrote, 'I cannot imagine a better environment Thank you to everyone at the Hebrew Home!'

Thank you for supporting us and sharing in our mission.

Sincerely,

Andrew S. Friedlander Chair

Thank you for your generous donation of \$180.00 to the Hebrew Home of Greater Washington, charged to your MasterCard on 1/4/2012. In accordance with IRS regulations, this letter writtles that your charatable contribution provided you with no goods or services in exchange for this donation. Please retain this letter for tax purposes.

4E 6121 Montrose Road • Rockville, TRGTON TH: 301.770.0409 • Fax 301.770.1

Tel. 301,770 (H09 + Fax 301,770 (H52 + wure hebrew-home org unre facebook com/GESLG unre netter com/highe

# Thank you letter

Thank you letters to donors include quotes from grateful family members for the care we provide their loved one.

The donor is not only thanked formally by the Chair of the organization, but also by people who benefit from their support of the Hebrew Home.



# **Thank You Postcards**

- Thank you cards are sent 2 3 times a year.
- Include an engaging photo of a resident with a brief story about the resident in the copy signed by the CEO and Chair.
- Testing found that the portion of our mailing list that received the card had a higher response rate to our appeals than those who did not receive the card.





# Lessons of 100 Lifetimes

- "Lessons of 100 Lifetimes, Wisdom to Guide the Next Generation" published in honor of the Hebrew Home's Centennial in 2010.
- Hebrew Home residents dictated their ethical wills to teen volunteers. Their words of wisdom are shared in this book.
- The book is illustrated by children's drawings that were submitted for an exhibit at the Hebrew Home, "What I Will Look Like When I Am 100." The book was given to 500 guests at our Centennial Gala and can be viewed on our website.





# **Donor Newsletter**

- Donor newsletter mails twice a year.
- We profile a significant donor in each issue but we also always include a profile of a Hebrew Home resident.
- The resident profile describes the person's life before moving to the Hebrew Home. The stories enhance the image donors may have of Hebrew Home residents.





# Video

- For our 100<sup>th</sup> anniversary, Susan Stamberg, hosted a 3 part video about the Hebrew Home's past, present and future. Part of the video was shown at our gala and the entire video is available on our website.
- In 2011, we presented an interview with a Hebrew Home resident, Paula Wolff, at our gala event. The video is available on our homepage.







## Conclusion

- Use storytelling in multiple ways.
- Tailor storytelling to meet our fundraising objectives.
- Memorable stories leave a lasting impression on donors and make them feel good about supporting the organization.



#### The Actors Fund, for everyone

in entertainment.

#### Dear Ms. Pratesi,

Joan came to The Lillian Booth Actors Home a little over a year ago.

Since the death of her husband, she had been living alone in a New York City apartment. In failing health, feeling isolated, and with a lease coming up for renewal, she realized she needed help. She turned to The Actors Fund.

Joan is an accomplished pianist, and the first time I heard her play wa Home in the community room. You can just barely see her over the music st and I walked in at just the right angle, so it seemed like the piano was playing

Thank goodness we were able to meet her needs—because this very en a remarkable impact on the Lillian Booth community. Today, she enjoys the performing artists and entertainers. No longer alone, this year she will sit do with her new 'family.'

Joan is one of more than 100 seniors we care for at The Lillian Booth assisted living facility. In addition to senior care at Lillian Booth, our other at in New York City and Los Angeles provide community to hundreds of people one of the many ways The Actors Fund supports those who sacrifice so much performing arts and entertainment.

I am so grateful that your support of The Actors Fund allows us to be women who bring the arts to life and stir our spirits. <u>But, without your help</u>,

On behalf of all the dancers, musicians, lighting technicians, set designers, and others who will turn to The Actors Fund in the months ahead, I ask you to consider a generous taxdeductible holiday gift of \$50 or more today to help someone in need.

Someone like Joan. Even though she suffers from severe arthritis and other health problems, Joan is anything but "retired." She gets around just fine using her walker, quizzing everyone on how music impacted their lives, and recruiting them for the community sing-alongs she's organized. At age 86, she still gives everything she's got and makes a tremendous difference in people's lives. She even teaches piano to young students who come to the Home for mentoring.

Once a week, the residents gather to sing, usually with Joan at the piano. Joan says the knows that even those who can't sing along are 'singing inside.' Music can bring comfort when nothing else can—especially for those people who are suffering from loss of memory. The music often triggers their



Jaan taday at the Lillian

Booth Home

The Actors Fund.

in entertainment.

for everyone

#### YEAR-END CONTRIBUTION FORM

# I want to support the vital work of The Actors Fund, providing a safety net for the men and women who sacrifice so much to enrich us all through their artistry. I've enclosed my tax- deductible year-end holiday gift. Please use this gift wherever it is most needed: **SMRC SMRC1.5 SMRC2 OTHER \$\_\_\_\_\_ Control SMRC1.5 SMRC2 SMRC1.5** Control **SMRC2 OTHER \$\_\_\_\_\_\_** Enclosed is my check payable to The Actors Fund.

Ellen B. Generous 1730 Rhode Island Ave., NW Suite 301 Washington, DC 20036 Source Code

To give by credit card, please see reverse.

The Actors Fund,

Thank you for your support!

Please do not detach. We will deliver your suggestions to Joan for you!

#### Special Message from Joan at the Lillian Booth Actors' Home

With the holiday season upon us, we'll be doing a lot of singing here at the Lillian Booth Actors' Home ... and we're always looking for songs to add to our list. Will you take a minute to suggest one or two of your favorite songs for us? Thanks.

— joan

Song Request

from Ellen B. Generous



Dianna L. Kunz Meals on Wheels Program Volunteers of America Colorado Branch 2660 Larimer Street Denver, CO 80205

Special Program Update Enclosed



Here's a photo of Jewell as a youngwoman when she neved into the Give Prints neighborhood. She never dreamed that she would be old, alone and dependent on others for her next meal.

# Stories can steward donors



#### **PCRM: Connecting Through Stories**

#### Betsy Wason, CFRE

Vice President for Development,

Physicians Committee for Responsible Medicine



### Every Organization Has a Story to Tell



### Marketing Your Story

- Think like a donor
- Keep your target audience in mind



#### PCRM's Development Program

- 150,000 active donors
- Multi-channel campaign includes direct mail, online marketing, telemarketing, events, personal solicitation, grants, and planned giving
- Program raises \$11million annually
- PCRM president Neal Barnard, MD, well-loved by donors





### Remembering Rodney Society

- Monthly Giving Program started in 2005
- 2700 donors
- 2011 Annual Revenue: \$449,000







cruel and unnecessary use of live animals in medical schools is in full force!

Dear PCRM Member PCRM's campaign to end th

#### **Campaign Targets Cruelty at Johns Hopkins University**

PCRM's efforts are heating up at each of the last remaining seven medical schools in the United States that still use live animals to teach students Schools in the United States that shall use live animatis to teach students. But nowhere has our campaign seen more action in the past few months than in Maryland, where PCRM is using every resource available to push Johns Hopkins University to stop using live animals in its teaching program.

Almost weekly, students in Johns Hopkins University's surgery clerkship

#### Remembering Rodney Society MONTHLY GIVING ENROLLMENT FORM

VCS, Dr. Barnard, I accept your invitation to become a member of the Remembering Rodney Society. I want to help you save all the "Rodneys" who are suffering pain and trauma, and provide regular support for all of PCRM's essential programs with my monthly pill of 198 [2010] 2010 [2010] □ I can't accept your invitation, but I'm enclosing a special one-time gift of:

We've launched legal efforts against Johns Hopkins University's School of Medicine and a letter-writing campaign to the executive dear of the University of Tennessee College of Medicine. A several techn schools, we're engaged in behind-the-scenes efforts with students, physicians, and faculty members. I know that with your help, our hard I know that with your help, our han work will pay off. Largely due to PCRM's efforts, 95 percent of all U.S. medical schools have stoppe using live animals in their ocurses. Each victory is a huge stop forwan in the march toward the day when animals are no longer used to teach future physicians.

But we must pull out all the stops to push the <u>last seven</u> <u>holdouts</u> to leave their cruel animal use behind and embrace modern, human-based training

HOOSE YOUR MONTHLY GIVING PAYMENT OPTION: Option One Rock Teacture According to the terms of the agreement below, I authorize my bank to pay PCRM the amount I've entered each month. I've endoed a check payable to PCRM for my first month's gift from my account and have signed below to authorize my gift. 🗋 MasterCard 🛄 Visa 🛄 Discover 🛄 American Express

5100 WISCONSIN AVE., N.W., STE





2012 Remembering Rodney Society Certificate of Appreciation

> Physicians Committee for Responsible Medicine is pleased to recognize

#### Jane Q. Samplename

for vigilantly standing up to cruel and unnecessary animal testing, calling for an end to using animals in medical training, and speaking out to protect human health.

Your dedicated commitment ends cruelty and saves lives

Neal D. Barnard. M.D PCRM

### **Creating Brand Recognition**

- Full story on Website
- **Direct Mail Appeal** 
  - Telemarketing
- **Brochure**

- Certificate
- Annual Conference Call



#### **Report from the Field**

- Quarterly report is sent to all donors \$35+.
- Inexpensive self-mailer.
- Features "insider information" from different staff members to build familiarity with PCRM's staff and campaigns.
- Donors feel more informed and engaged via this "peek behind the curtain" – which they can't get from just the website or magazine.





#### PCRM Report from the Field



Dear PCRM Member,

This year, Congress is seeking to modernize the outdated Toxic Substances Control Act (TSCA) that regulates how chemicals must be tested.

Thankfully, with your help, PCRM is speaking up for animals in this process.

PCRM played a key role in drafting important sections of the new Senate bill, and joined House members in critical stakeholder dialogues.

Millions of animals' lives are on the line, and PCRM is determined to remain an active participant in the TSCA reform process, and to speak out to minimize and replace cruel animal-based testing.

Lhope you'll get involved by following this issue online at www.PCRM.org/Toxicology. And be ready to join the fight if we need you to contact key decision makers to express your commitment to modern testing methods that spare animals' lives. Thank you.

Chall Aurdusky Chad B. Sandusky, Ph.D.

Senior Director of Toxicology and Research Giving Animals a Voice in Toxicity Testing Reform

Every day, animals, such as mice, dogs, rabbits, rats, and guinea pigs suffer and die as they are exposed to high doses of chemicals in toxicity tests. These tests attempt to determine the potential danger chemicals may pose to human health. However, animals often react differently from people when exposed to chemicals — so the results are not even reliable for predicting human effects.

As Congress seeks to reform the Toxic Substances Control Act (TSCA) to require companies to provide more information on chemicals used in manufacturing and various consumer products—everything from plastics to carpeting to computers.-PCRM is delivering a crucial message to our leaders: <u>modern testing</u> should be based not on animal tests, but on valid scientific methods.

And with PCRM member support, we're being heard. After speaking with numerous congressional offices, PCRM was asked to provide specific language for portions of the Senate bill. We were also invited to participate on a stakeholder committee to weigh in on the House of Representatives' version of the bill.



PCRM's effective involvement is evident. Both the House and Senate bills currently include lengthy sections entitled 'Reduction of Animal-Based Testing' as well as many of PCRM's most important recommendations, including:

- · Using existing data to prevent duplicate testing that sacrifices animals.
- Funding research to replace animals in chemical testing.
- · Using nonanimal alternatives when they are available.

Now, PCRM must work to ensure that this language remains in the bill, and that detrimental measures that would result in more animal suffering are not inserted. Your involvement is critical to our success. Please go to www.PCRM.org/Toxicology to learn more about this essential issue and find out how you can help.

> We're making progress every day with your support. Thank you!



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Report from the Field can make science accessible by using stories.





A Story Comes to Life: The Great Ape Protection Act



#### **Direct Marketing: Reaching Numbers**

- Mail appeals to donors
- Articles in PCRM's quarterly magazine
- Action Alerts
- E-appeals



#### Using Video

- Web-only is easy and quick to produce
- Can reach a lot of people quickly
- Inexpensive way to support and strengthen your message





### Special Events: Performance Art



### In Conclusion Coordinate Your Story Telling

- Consistency across channels Does your website reflect the messages you are sharing in your direct marketing pieces?
- Consistency within the organization Are all departments using the same names, numbers, and updates?





#### Make your Mission Come Alive!

MercyCorps



December 2011

Dear Friend of Mercy Corps,

Thank you. You've restored hope and opportunity for so many suffering people around the world this year.

I am grateful for your generous support in 2011. You helped Mercy Corps expand our lifesaving programs into five new countries – and helped thousands more people transcend the grip of poverty and devastation to begin building a brighter future.

Our larger worldwide presence could not have come at a more critical time – because as you know, all too many families were devastated by disasters this year. From the earthquake and Isunami that ravaged Japan to the humanifarian crisis in the Horn of Africa, the suffering has been immense. But person by person, family by family, your support of Mercy Corps brought lifessing aid and lasting hope.

As we near the close of the year, I would like to introduce you to two of the people whose lives are better today ... because of you.

Their names are Herma and Nimo. And while they live in different countries and speak different languages, their stories of tenacity and spirit transcend all borders. Likewise, the gratitude they feel for your assistance is limitless.

As I share Herma's and Nimo's photos and stories of courage with you, I hope you will feel proud of how you have made a difference in their lives. <u>You can continue providing</u> lifesaving aid and heartfelt support to more people by mailing your generous year-end gift to Mercy Corps today.

One look at the enclosed photos and you'll see the power of your donation.

The photo of the young girl is Herma. Herma is just 13 years old, but she has endured so many hardships in her life that she exudes the wisdom of someone much older. Growing up in Haiti, Herma lived through the catastrophic earthquake that killed 200,000 people nearly two years ago. But even hefore the tragedy, Herma spent years living in one of Haiti's toughest slums under the constant threat of gangs and guns.

Today, with your help, so much has changed for Herma! Every week she participates in Mercy Corps' Moving Farward program, which uses sports to teach kids the team-building and communication skills they need to feel empowered and secure in their lives.

For girls like Herma, who grew up afraid to play in their neighborhoods and whose lives

(over, please)

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#### Help Donors learn what larger gifts can do

uncommon minds for uncommon missions

			Helping Millions Help Themseices
FIRST CLASS POSTAGE			November 20, 2010
FIRST CLASS FOOT	ACCION Independence	Carlin Contraction 2015 Manimum St NW Washington DC 20045	-
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	16 The and Marke Une Seleration 16 The selection Selection Minneepolies, MN Sec. 200	<u>ACCION</u> . You enable us to giv way toward more productive, he <u>Lam thrilled to tell you th</u> surpassed 3.2 million this year. I into account family members, ne success of these small, local busi	say that friends like you are truly the backbone of e impoverished people the tools they need to work their althy and independent futures. hat with your helps, the number of people ACCION helps But that's only the beginning of the story. Once you take righbors and employees who also benefit from the insesse, the actual number of people we helped last year
		But of course, a Which is why I am urg	Insting change, ACCION truly has a ripple effect.
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	eliminate parerty workhuide		Please make your check payable to ACCION International and return it with this form

# Thank You!



# **Tiffany Neill**

Partner Lautman Maska Neill & Company 202-296-9660 tneill@lautmandc.com



2012 Washington Nonprofit Conference