The Westerly Land Trust

Fund Raising
Performance and Methods 2006 - 2008
Fund Raising Performance - Revenue

(From “Mass Market” campaigns used to raise operating funds. Grants and major gifts are excluded.)
Fund Raising Performance – Donors, etc.

(From “Mass Market” campaigns used to raise operating funds. Grants and major gifts are excluded.)
GY 2008 Revenue Sources

(Limited to "Mass Market" campaigns used to raise operating funds. Grants and major gifts are excluded.)
Methods We Use

• Past:
  – Primary – Direct Mail ~ 70% of GY 2008 revenue
  – Secondary ~ 30% of GY 2008 revenue
    • Newsletter - mailed 4X / year to “members” ~ 400 pieces
    • Tables / volunteers at every event
  – Direct mail potential probably limited to ~ $50,000
    • Census: 1,600 households in Westerly with income over $50K
      – Now reaching ~ 40%, getting donations from 20%, and raising $45,000
      – Geographic footprint essentially limited to Westerly

• Now:
  • Starting GY 2009, need to raise additional $50,000 via one-on-one Board contacts
  • Data Base will be key to “Moves Management”
Direct Mail at WLT

• WLT’s Data Base
  – Before May 2006, a Word file of mailing labels
  – GY 2007 – 1st generation: iMIS, acquired via L&WP
  – GY 2008 – 2nd generation: DonorPerfect Online
  – 700+ households, donor history starting 2003, plus a 1998 capital campaign
• Direct Mail Campaigns
  – Giving year 10/1 to 9/30, Two main mailings:
    • Fall: ~ 600 pieces, early November, segmented
    • Spring: ~ 400 pieces – SYBNT plus
    • Exclude donors who gave in last 90 days
Mailings

– Mail piece – Make it look like an important communication!
  • Letter – one-page, heavy letterhead w/ Board names, customized via Mail Merge
  • Customized response slip with code & #9 envelope
  • Optional insert – typically a newspaper reprint
  • In #10 envelope, w/ 1st class stamp, Address Service Requested
  • Clear labels, no window envelopes

– Acknowledgments
  • Sent within a month of receiving donation, preferably sooner
  • Mail merge letter on heavy letterhead
    – Includes IRS boilerplate
    – Includes a customized response slip and #9 envelope
    – No ask! (except in exceptional circumstances)
Mailings – Other Details

• Segmentation (used in GY 2008 campaign)
  – Letter text customized based on segmentation
    • Top Donors – recent gift of $250 or more
    • Established Donors – At least one gift in last two GYs
    • Non-donor or lapsed donor

• Production
  – Have used mail houses – relatively expensive
  – Switching to in-house
    • 400-piece GY 2008 Spring mailing prepared in-house
    • GY 2009: Planning 670 pieces, 5 segments, early November
    • Considering purchase of color, duplex laser printer, < $1,000
Acquisition – The Key Problem

• We must grow our list – insatiable appetite for new households

• Things that didn’t work
  – High volume (~2,700 pieces) professional mailings with rented lists – too costly, got ~ 56 names for $4,000, did not pay for itself
  – Broadcast newsletter via newspaper insertions – also did not pay. We now mail newsletter to “members” and distribute at events.
Acquisition – Better Approaches

• Things that worked:
  – Chamber of Commerce - $50 list, 895 pieces, got 27 new members, easily paid for itself.
  – Vendor mailing – 78 pieces, got 8 new corporate members, paid for itself.

• Things we want to try – need volunteers:
  – Preserve abutters – use assessor records, etc
  – Real estate sales – WPWA does this
Lessons Learned

• Almost any database is better than no database.

• Donor histories are important: you can focus your efforts and segment your campaigns.

• You can (and should) produce high-quality mailings in-house.

• Grow your list: acquisition is everything.