



# The Westerly Land Trust

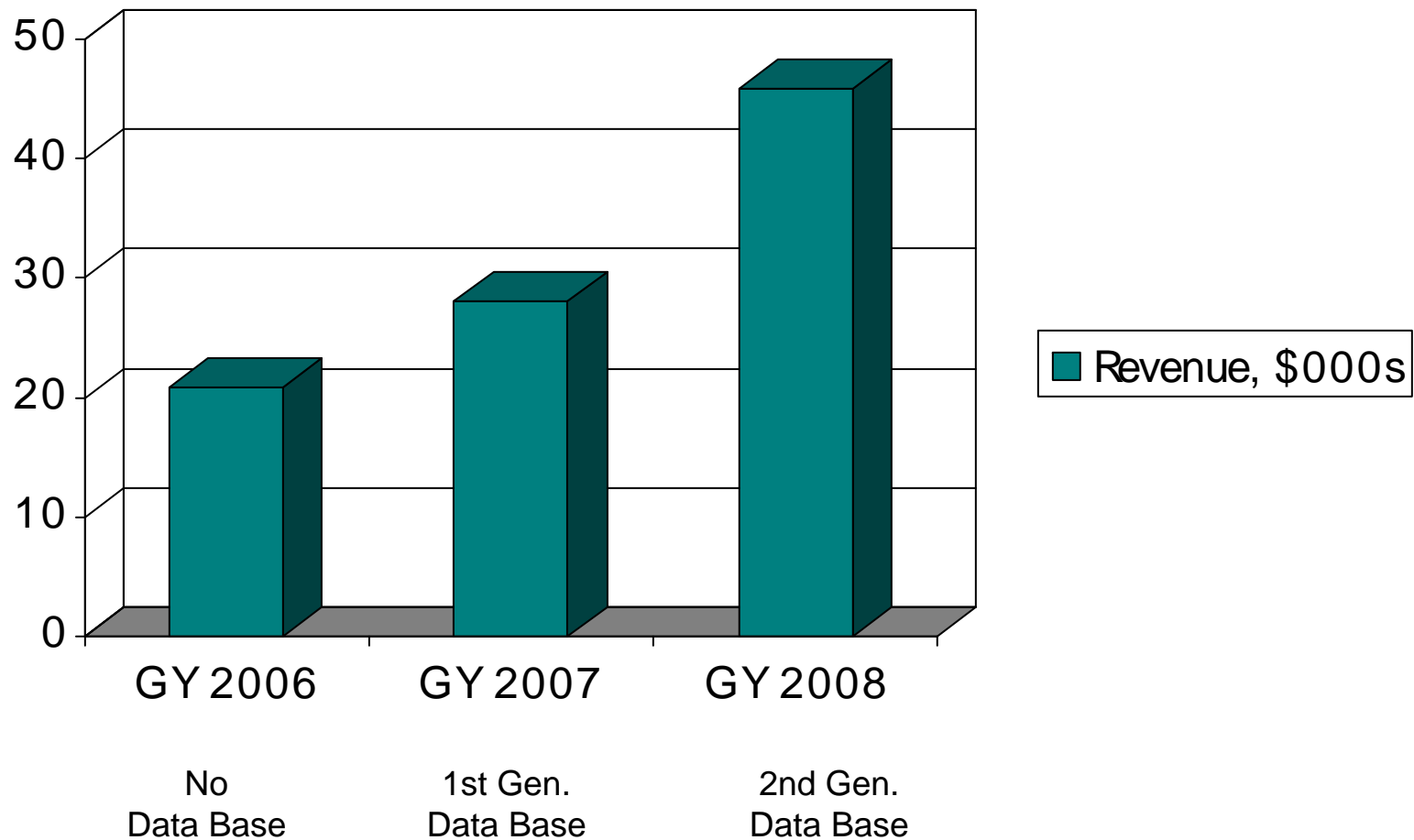
Fund Raising

Performance and Methods 2006 - 2008



# Fund Raising Performance - Revenue

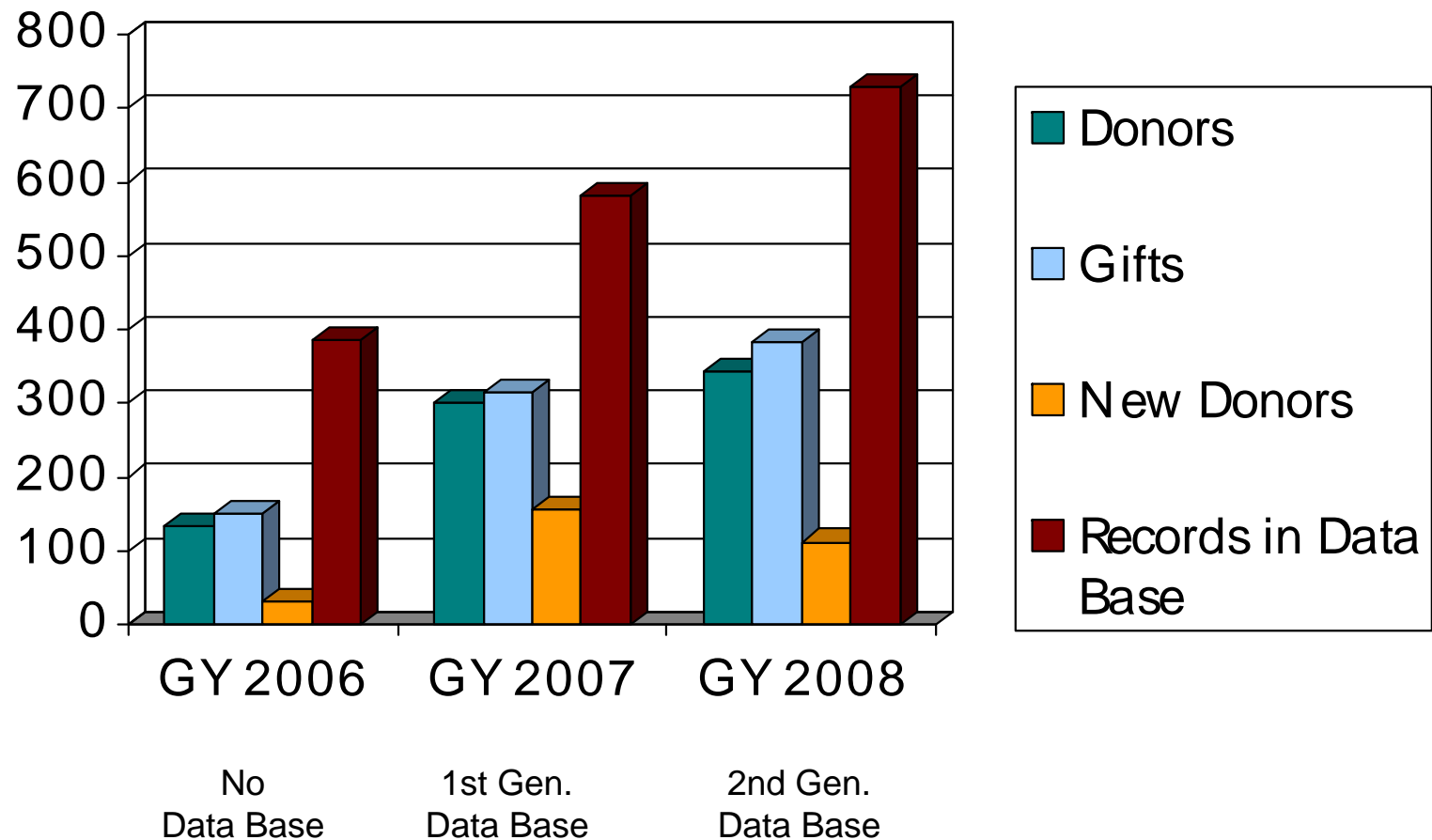
(From "Mass Market" campaigns used to raise operating funds. Grants and major gifts are excluded.)





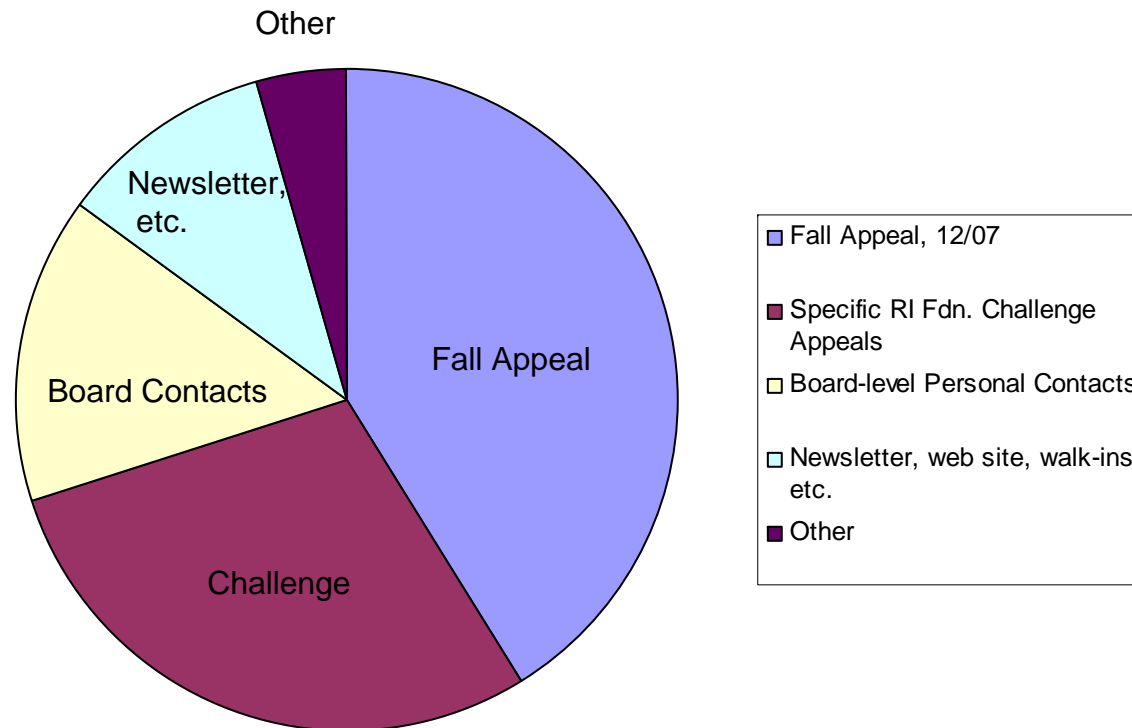
# Fund Raising Performance – Donors, etc.

(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 – 1<sup>st</sup> generation: iMIS, acquired via L&WP
  - GY 2008 – 2<sup>nd</sup> 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/ 1<sup>st</sup> 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.