

## Klein & Roth Consulting

Klein & Roth Consulting helps nonprofit organizations build strong fundraising programs that are mission-driven. We provide practical, hands-on advice, grounded in social justice values. We offer a highly experienced team of consultants who specialize in helping organizations build a broad base of individual donors, through consulting, coaching and training. Our goal is to empower clients to become proficient and self-sufficient in their fundraising work.

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### Fundraising Consulting Project Examples

- **Planning and implementing campaigns to recruit and renew members and/or donors**  
A loyal and growing membership/donor base can be a reliable and significant source of funding. We can help you to determine membership levels and benefits, identify target audiences and strategies to recruit and keep new members/donors, develop membership recruitment materials and communications (for mail, e-mail, social media and your website), schedule membership recruitment and renewal activities, and coach you on implementing your membership program plans.
- **Planning and implementing annual fund campaigns to raise money from individual donors and local businesses**  
Many people will contribute above and beyond membership dues if you ask them and share compelling reasons to do so. If your group would like help in designing and implementing an annual fundraising campaign, we would work with you to articulate the reasons why your group needs funding and to develop ambitious yet realistic fundraising goals, strategies and timelines. We can also train board members, help create campaign materials and coach staff and board members on asking people for contributions.
- **Creating an annual fundraising plan**  
Developing realistic fundraising plans and goals is critical to success. We can assess your organization's current fundraising capacities and help your group develop a plan to raise money from multiple sources (individuals, businesses, foundations), with a focus on acquiring new donors, retaining existing donors, and asking some donors to increase their contributions.
- **Training and coaching board members, staff members and volunteers on how to ask for contributions**  
Very few people like to ask for money. Yet few donors contribute without being asked. We can provide group training or one-on-one coaching to help identify barriers your

organization's leaders might have to fundraising and to provide you with tools to become effective at asking people for contributions to further your group's mission.

- **Developing a Case for Support (rationale and reasons why people, businesses and institutions should support park partner organizations)**

Can you clearly and convincingly articulate why your organization exists? Can you explain the key programs and services your group provides? If you can't, it will be difficult to persuade and excite others to contribute to your association. We can help you develop a case for support, a clear and compelling statement of why an individual, business or foundation should support your group.

- **Developing a monthly giving or sustainers program**

People who give monthly through automatic fund transfer systems are the backbones of some fundraising programs. We can advise you on what you'll need to have in place to implement a successful program to convince supporters to become sustaining donors.

- **Advising on grantseeking**

Obtaining grants from foundations can be perplexing. We can help you to identify appropriate potential funders, determine how to initiate contact, and develop strong proposals. We can also advise on managing relationships with foundation funders.

- **Board development**

Your board members are vital ambassadors to excite your community about the park(s) you support. But do you have enough board members? And are your board members truly advancing your organization's mission? We can conduct board assessments to identify areas for improvement in board functioning, assist in developing board recruitment processes, assist in identifying potential new board prospects, and train boards in their governance roles and responsibilities.

- **Building a fundraising team, beyond board and staff**

Often the most successful fundraising programs count on a broader community of people helping out with fundraising, including volunteers and other interested community members. We can help you brainstorm people who might be willing to help out with specific campaigns or fundraising activities, including asking their friends to support your work.

- **Reviewing materials for fundraising**

Your association may have a compelling mission and do great work, but if you can't communicate that in a clear and compelling way, your fundraising will lag. We can help you write and edit fundraising appeals, thank you letters, newsletters, foundation proposals, and copy for fundraising-related web pages.

- **Developing a major gifts programs**

Your organization may already have a base of loyal members or donors, but they may all be contributing small amounts. You could be missing opportunities to build stronger relationships with current and potential major donors, and to secure major gifts (amounts vary depending on the organization, but generally gifts of \$500 or more). We can help you develop a structured effort to identify potential major donors and to ask them to contribute to advance your mission.

- **Planning and implementing capital or endowment campaigns**

Your organization may be at a point in its development when it makes sense to think about creating an endowment or to add an interpretive center or other building. These will require major fundraising efforts involving much thought and planning. We would work with you to assess your group's capacity to conduct an endowment or capital campaign, as well as your donors' receptivity to such a campaign. We can also help structure and organize a major endowment or capital fundraising effort.

- **Planning and implementing a planned giving program**

Do you dream of a supporter leaving your organization \$1 million in her will? Chances of that happening are slim if you don't encourage your donors to consider estate gifts. We can help you create the infrastructure for a planned giving program, develop materials to promote estate gifts, and coach you on how to bring up the subject with your donors.