



Triratna Online Fundraising Toolkit

Introduction

Why have a version 2?

This Toolkit #2 is a follow on from [the original Triratna Fundraising Toolkit](#). The original toolkit was designed in response to the financial pressures created by the Covid crisis and lockdown, to help Centres with the principles and practice of fundraising online. Since releasing that toolkit I have been working with individual Centres to help them with their fundraising and have more recently hosted an online [Sikkha webinar together with Sanghamani](#) (Karuna Trust), in which we explored the main channels of fundraising in more depth. This document is a summary of that fundraising webinar in three sections and can be used as a continuation of the original Fundraising Toolkit.

The first section of this Toolkit #2 covers making the initial decision to fundraise and how to approach fundraising as a practice (there is more about this in the original toolkit). The second section is about choosing the best channel/s to use to fundraise at your centre (telephone, email and 'live-Zoom or livestream' appeals) and how best to use them. The final section is my 'top 10 tips'.

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With thanks also to Sanghamani and Maitrinara
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with feedback or suggestions for edits to the document.

Section 1

Deciding to fundraise and some basics of fundraising

Here are some questions you might ask yourselves as a Centre before any fundraising initiative.

Should we fundraise now?

- Do you think a crisis is a bad time to ask for money? [1]
- Notice and question your own assumptions and projections about asking for money.
- Recognise perfectionism — an ask doesn't have to be perfect, especially in the time of emergency.
- Consider the potential of inviting people to be part of something — a co-operation or shared effort — the Sangha pulling together.
- Consider the benefits of developing a collective empathy around the situation — times are uncertain, including potential financial uncertainty, for both individuals and for Buddhist Centres / retreat Centres.
- Might people be very upset if you didn't ask, and then had to close the Centre further down the line?

How is Fundraising a Spiritual Practice?

- Asking for money is challenging. You're putting yourself in a position of potential rejection. But there is the potential to close the gap between self and other, through communication, awareness and *metta*.
- You get to see yourself clearly — your own views, fears, projections. Through the practice of awareness in a quite heightened situation, we can get to see how we interpret and assume things and we can learn to respond consciously and creatively.

- With a deepened embodied awareness, authenticity and courage we can see how we create a sense of separation from others and begin to see through our views and self-created identities.
- When Sangharakshita was asked why he thought Karuna Doorknocking Appeals were such a transformative practice, he answered ‘because you are doing it for other... Whether you are temperamentally suited to it or not.’ Keeping this perspective — that we are not just asking for money in an abstract way, we have a vision to develop the Sangha, to reach more people, to support others to ease suffering — can really help as a motivation when feeling resistance.

How can you communicate about the cause?

- If the appeal is a crisis / emergency appeal then be clear about that.
- Communicate the inspiration and vision of the project — it’s about the Sangha and the Dharma being offered to more people — rather than the fears i.e. not being able to pay the bills!
- Tell a story — individual or collective — about how people are benefitting.

How can you ask for money?

- Giving people a clear reason to give (See *Case for Support* section of the original document, i.e. to pass the Dharma on). [2]
- Inviting the Sangha clearly and courageously to be part of that — contributing towards a vision (not a problem).
- Exploring the value of sharing what we have (including money!).
- Suggesting an amount — this can feel uncomfortable as we all have different responses to what a particular amount of money can mean. And money is quite a taboo topic to talk about! It brings up many strong views. However, some people feel an urge to be generous, but have no sense of how much they might contribute and will feel grateful to have a suggestion. Often, what a suggested amount can do is help people gauge for themselves how much they’d like to give — they can notice their response to the suggestion and work out from there what the best amount is for them to give at the time.
- When asking by telephone or during a Zoom or livestream appeal it is important to develop an awareness of your own views around money and asking — this is a big area, so at some point you might need more training around this.
- Karuna appeals are excellent for this! Especially for learning about how you are in relation to opening up and asking for help, including areas such as:
 - Rejection

- Autonomy — that you should get on with it by yourself / you don't need help.
- Fear — being willing to experience discomfort.
- Your own relationship to generosity, including receiving it!
- Fear that you might be manipulative.

Notes

[1]

You can see [Amalavajra's response to this question](#) in this video,

<https://vimeo.com/405880718>

[2]

The Triratna Online Fundraising Toolkit [version 1](#),

<https://sikkha.online/wp-content/uploads/sites/124/2020/04/Triratna-Online-Fundraising-Toolkit.pdf>

Section 2

Deciding which fundraising channel to use

As a Centre it's important to decide which are the right channels for you to fundraise with and how best to use them. Here is a summary of three channels you can use for fundraising at your Centre.

Telephone fundraising appeal

Why run a telephone appeal?

- An opportunity to connect personally with Sangha members.
- It's possible to start with the connection and assess whether it's a good time to ask or not. Phone calls are much more personal than emails as they are relational. For example, you can acknowledge it's a time of uncertainty.
- It's also an opportunity to thank current donors, inform them of new developments and ask if they are able to increase their donation.
- Connection is key — have a conversation!

How to do it

- Calling those you have permission to call through GDPR requirements.
- Calling regular supporters — those who give a Standing Order/regular payment. During lockdown late afternoon is a good time to call. Outside of that, early evening may be better.
- Have a set period of time when you might call — put aside at least two weeks to be able to get into the rhythm of it. Six weeks is probably a maximum, as it's hard to sustain the energy and inspiration for much longer.
- Have a set time of day — i.e. 2 hours every evening — and stick to it. It's easy to feel resistance and find reasons not to start calling. The structure will help to work with that.

- Ideally there would be a team, or at least two people, making the calls — you can support each other, perhaps by meeting online to check in each day before calling. Also by sharing your experiences after the calls.
- Keep good records (GDPR compliant) of who you have called and the outcome.
- Stay with the squirming! This is the inner work we have to do as fundraisers — working with our own discomfort around asking, and around money. Keeping the project cause in mind can really help with this, as well as our Dharma training of noticing *vedana* and meeting it with spaciousness and awareness.
- Leave space — it's tempting to fill any pauses, as we don't want to sit in the discomfort. But space can be creative and allow people to have a more true and genuine response.
- Don't apologise! We need to find a way to connect with what we're asking for and why we are asking. Also, can we be in contact with the positive outcomes for someone if they choose to give? Many people feel grateful to have the opportunity to be generous and contribute to a project they feel a connection with. We also know that it's fine if someone says no — it's their choice.

Email Appeal

Why run an email campaign?

- It's possible to reach lots of people.
- You can include hyperlinks which take people directly to giving pages making it easier practically for people to give — imagine the link as a *dana* bowl!

How to do it

- Follow the Case for Support format as with all appeals.
- Vision: it's very important to focus on the vision and potential. You might consider an appeal name and image to go alongside the vision.
- Problem: you don't need to spend too long here, but it's good to be clear about figures — i.e. the shortfall — and then invite people to take shared responsibility for that.
- Solution: decide on a target and how people can help. Develop clarity around the ask — is it a regular or one off? Generally, regular donations help with regular running costs — such as support / earnings for people working in the Centre and general running costs. One off asks are usually for a capital appeal (i.e. paying for new shrine/new centre, etc - you have a specific one off target to make).
- Use 'you' to make it personal to each individual.
- Ask them to do it **now!** while they have the urge (we know life can get in the way).

- Include a short video inline if possible (or the image and a link). Video is personal and catches attention more than text. This could be done by the Chair or someone well known by most in the Sangha. It should include a Case for Support and ask — no longer than 3-5minutes maximum.
- Include the links to a giving page scattered throughout the email in different formats; make it easy for people to give! The links should go directly to a giving platform or to a giving page on your website. See a comparison of some giving platforms. [3]
- A clear target — targets help the fundraiser and the donor — to know how much is needed and how you are progressing towards that amount
- Suggesting an amount (see above for why this helps).
- Send one email to people who already support you — thank them and ask if they are in a position to give more, or even if they need to reduce their giving! And another different email to those who don't yet give (only to those people for whom you have GDPR permission).

What should the format be?

- Enough content and impact, but not too long.
- 1 side A4 maximum.
- Look nice and easy to read — Mailchimp is good at making them look nice!
- Put in headings if there is a lot of text or some areas in bold or underlined, so when people glance through, they know what they're being asked.
- Add a P.S.: data shows that many people follow a link from a P.S.

How many emails should you send?

- Send follow up emails — 2 or 3 maximum, so that people are reminded to follow it up.
- Anything else?
- Thank people for giving — provide good supporter care.
- A timely email or a short thank you video from the chair sent out to supporters.

Zoom/live streaming - dana appeals

Why?

- Following a live Sangha event people are most alive to the benefits of the three jewels.

When to do it?

- At the end of every session.
- If doing a retreat, once each day or at the end of each substantial session (people come in and out more during online classes / retreats).

How and what to do?

- For more in depth support see my two videos on the Sikkha website. [4]
- Use the Case For Support format (which I mentioned earlier, and see the Fundraising Toolkit).

3 Cs!

- **Connection:**
 - With yourself; aware of how you are when asking — nervous/excited? Just be with that.
 - With the Sangha; these are your audience so use eye contact, and speak to them personally.
 - With the cause! Being in contact with the Vision — story/meaning/connection/value. Get away from the script — keep what you say fresh/alive/related to your own talk or what's been alive that session.
- **Conviction:**
 - Be non-apologetic and transparent.
 - Remember that people want to give — and to be part of something.
 - Be in touch with what you personally have gained from the Buddhist Centre ... and with what you personally gain from giving!
- **Clarity:**
 - Be clear about what you are asking for — regular or one off donations?
 - Give a target and a sense of urgency.
 - Make it clear and easy to give — put a hyperlink (to your giving platform or giving page on your website) in the description / chat and tell people the URL / website.
 - Mention / suggest a particular donation amount.

Other forums to consider

Website donation page

- Short videos on website / social media, plus the link to give.
- Links in the descriptions under your YouTube videos.

Notes

[3]

[A comparison of some giving platforms,](https://sikkha.online/wp-content/uploads/sites/124/2020/04/Online-giving-platform-comparison-Sheet.pdf)

<https://sikkha.online/wp-content/uploads/sites/124/2020/04/Online-giving-platform-comparison-Sheet.pdf>

[4]

Two videos,

[Making an Online Dana Appeal,](https://vimeo.com/427799693) <https://vimeo.com/427799693>

[A Sample Dana Appeal,](https://vimeo.com/428413667) <https://vimeo.com/428413667>

Section 3

Top Ten Tips!

1. See fundraising as a spiritual practice.
2. Remember the Case For Support format — more on this in the original Fundraising Toolkit (see the resources, below).
3. Get away from the script — be real and in touch with what's live!
4. Regular giving makes your Centre's situation more sustainable — at Karuna, 80% of income is through Direct Debit / regular donations — most other charities would be amazed at this!
Regular giving is inviting someone to take shared responsibility of the situation with us — to sponsor it, and be a part of it.
5. Stay with the tension — leave space — breathe.
6. Connection — with yourself, the vision, the audience.
7. Make it easy to give.
 - Practically — include links, etc.
 - Clarity around what you're asking (regular/ one-off?).
 - Suggest an amount.
 - A clear and specific ask!
8. Targets help! — To create a sense of urgency, and a joint vision of reaching something together.
9. Be willing to be aware of your views around money / generosity / asking for help etc.
10. Be willing to learn / change / grow — to ask for and give kind and helpful feedback, and to see this communication as a practice / skill.

More Resources

The [original](#) *Triratna Online Fundraising Toolkit* can be found

<https://sikkha.online/wp-content/uploads/sites/124/2020/04/Triratna-Online-Fundraising-Toolkit.pdf>

You can find all the videos and documents mentioned in the Toolkit #2 on the [Centre Fundraising Support](#) page on the Sikkha website,

<https://sikkha.online/centre-fundraising-support/>

You can find fundraising stories, tips and collaborations from all over the Triratna world on the [Centre Fundraising Forum](#) at The Buddhist Centre Online,

<https://thebuddhistcentre.com/futuredharma/centre-fundraising-forum>

Sikkha [webinar](#) with Sanghamani (Karuna Trust),

<https://www.youtube.com/watch?v=yWkbL8Dq7D4>