



**FutureDharmaFund**  
Supporting Everyday Bodhisattvas

# Triratna Communications and Fundraising Toolkit

## **V2. August 2023**

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## Section 1 - Fundraising

### 1.1 Introduction; Fundraising



We live in a constantly changing world bringing with it new challenges and opportunities. As we know quite well, we cannot expect anything to remain unchanged and therefore we need to be ready to adapt with agility and tenacity. Whatever challenges we might face in our groups and centres, having healthy financial resources appropriate to our local context can be a deciding factor in whether we keep the Dharma afloat in the communities that we care about.

In 2020 FutureDharma responded to the Covid-19 pandemic with a number of resources to support centres in adapting to moving online when centres and groups were closed, with normal sources of income lost. On behalf of FutureDharma, Kusaladevi created the 'Triratna Online Fundraising Toolkit' and recorded an excellent seminar with Sanghamani from the Karuna Trust. These resources are still excellent sources of information and you can access them via the [Sikkha Project website](#).

But now, at the time of writing, we are well into our next crisis which is putting pressure on our groups and centres; the world over we are facing a cost of living crisis, exacerbated once again by an uncertain and delicately balanced World.

We know this won't be the last challenge we face. At FutureDharma, we see that we have a pivotal role to play in supporting the financial resilience of our movement. We want to share the knowledge that we have gained since our founding in 2016, particularly in our Communications and Fundraising work.

This toolkit has been assembled to help your local group or centre to maximise your potential income by supporting you with key fundraising tips and crucial guidance on getting the most out of your communications. We are indebted to the work undertaken by Kusaladevi in 2020 and this resource pack builds upon her work.

*Kusalarāja - Fundraising and Communications Director at FutureDharma Fund 2*

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## 1.2 How do *you* feel about money?

Before you undertake any fundraising, it might be useful to reflect on some of the following questions;

- When do you ask for money?
- What do you find difficult about asking for money?
- Can you remember a time you successfully asked for money/dana? What made this occasion successful?

Take a moment to reflect on your own attitude to money;

- Are you an “abundant type”? Do you feel that there is plenty of money to go around?
- Or do you have feelings of scarcity around money? Do you generally consider that there is not enough money to go around?
- Where do these feelings around money come from?
- Can you think about how they might be influencing your approach to asking for dana?

If we are responsible for fundraising for our centre, it is important to consider how our own views and habits around money can impact what we think about other people's capacity or willingness to give. Do your concerns about money scarcity prevent you from asking for dana? Or do your feelings of abundance affect your ability to see someone else financial difficulties?

If you have time it might be worth it for your centre teams to explore your “money life

story". Explore with each other where your views around money have come from and how they have impacted aspects of your life. Doing this can bring a much greater awareness to your money samskaras.

Remember that an "ask" (for money, during an appeal) doesn't have to be perfect, learn from what goes well and what you would like to improve. You are not just asking for money; you are inviting people to be part of something - a co-operation or shared effort - the Sangha pulling together. Might people be very upset if you didn't ask, and then had to close the Centre or stop your group further down the line?

## 1.3 Fundraising Principles

There are a number of principles here and it will be almost impossible to apply them all in one go. Perhaps just try to be aware of one or two (maybe those you think are more likely to be your working ground) on each appeal you do and add one or two new principles as a focus each time.

### **Be yourself**

When you are doing a dana appeal, be aware of the potential tension in yourself between the ideal and your actual experience - you may be tired, feeling overwhelmed, or nervous - all of that is fine if you are aware of it. Of course, you may be feeling connected, at ease, and relaxed and that is great too.

The most important thing is that you are authentic, whilst also focussing on your audience and not over-identifying with your own experience.

### **Remain Connected**

#### ***...with yourself***

Keep a sense of connection with the body, feeling grounded, being aware of any sensations in your body - also being aware of your own views around money, any habits or conditioning that you notice arising around money

#### ***...with others***

Keep contact with a sense of metta, remain connected with your audience, eye contact, and be aware of your body language and what you might be saying to people - even if online, keep a sense of eye contact and connection.

If you can, connect with why you're asking for money and what you're asking for

beforehand. Connect with your own sense of appreciation of and enthusiasm for the Dharma, the teachers, and the Buddhist Centre.

### **Leave Space**

It will be tempting to rush through and get your message out there as quickly as possible. This is especially what people do when they are nervous. Pause. Breathe. Look at people. Keep it appropriate of course and be conscious of leaving space and the speed of your communication.

### **Timing**

It can be tempting to get a quick dana appeal in at the end of a session with just a couple of minutes to spare. Consider what frame of mind your audience are in at different times during a session. At the end of a class, people may be waiting to get off to go home, to catch a bus or a train or to get to their next engagement.

Consider putting your dana appeal in before a break; at this point your audience will have time to think about what you have said, but they are not rushing off. You might even be able to create a space for them to make the donation at this point, by having a dana bowl/card

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reader or a laptop available. If you are online, you can share a giving link or your bank details into the chat and encourage donations to be made during the break.

### **Be clear about the benefit**

As much as possible, while keeping it succinct and relevant, spell out what difference a donation will make and why that is important. i.e. *“an extra £400 per month would mean we can continue to support (...persons name...) to share the Dharma”*

### **Match the energy of your audience**

Make your message relevant to your audience. If you can, match the tone and energy of your audience, being aware of what has come before the dana appeal, as you would in any communication.

### **Make an imaginative connection**

If you can, use empathy and imagination, before the dana appeal and during it, with your audience and with the beneficiaries (the Sangha and potential future Sangha) You want a sense of feeling connected with your audience and their potential response and also with the beneficiaries.

### **Opportunity for Spiritual death and learning**

The appeal might not go how you want it to. That's fine, see it as an opportunity for Spiritual death and also for learning. Learn from what goes well and what doesn't. Keep an open mind and a learning attitude - the best fundraisers are those willing to learn.

### **Take risks**

Be willing to step outside your comfort zone and take risks in your communication. Think back to your own attitude around money; how is this impacting what you're willing to say?

### **Name the tension**

Your appeal doesn't have to be perfect; be willing to acknowledge if something goes wrong and name that out loud.

### **Be organised**

Prepare beforehand - ensure you know what you're asking and where you are directing people to - i.e. pointing people to correct URL to make donation, etc

### **Practice**

You wouldn't deliver a Dharma talk or lead a class without preparing, and the same applies to asking for donations. Prepare in advance and practice until you feel familiar and comfortable with what you are going to say.

### **Don't be apologetic**

It is fine to ask and know that people will respond as and when they are able. When people in the Sangha know of the need and how they are able to help, they have a choice about how to respond - we don't need to do the work for them. We can feel confident to ask.

## 1.4 Developing a Case for Support

A Case for Support is what you will base your 'ask' around in a dana appeal. It will differ slightly, depending on the channel you are using for delivery.

A Case for Support, no matter what the length or the means of delivery, has this Four+ structure:

1. Vision
  2. Problem
  3. Solution
  4. Personal and specific ask
- + Request that they give now (while they remember and are inspired)

### 1.4.1 Vision

Briefly describe the frame of what it is that your group or centre does. Think big; ie. do you simply run meditation classes? Or - in actual fact - are you trying to change the world by ensuring that as many people as possible have access to the Dharma and are working on their minds?

## 1.4.2 Problem

Here we consider what is the barrier or potential challenge to the running of your group. For many places, this will be overcoming the financial burden of running a centre or renting a space and providing activities. However it must also include the 'human problem', ie people's suffering.

Describe the problem by breaking it down into the following sections;

- 1. The essence of the problem and it's consequences**
- 2. What's not obvious;** what might be something that someone wouldn't expect about the problem?
- 3. An individual's story;** with a focus on their challenges

## 1.4.3 Solution

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Next, we set out how we overcome the problem;

- 4. Story; continue/conclude the individual story;** with a focus on how they overcame those challenges
- 5. Numerically;** set out your solution in numbers
- 6. Link to at least one of Cialdini's<sup>1</sup> 6 principles;**
  - 6.1. **Reciprocity;** 'give something to get something in return', asking people to give because they have benefitted also
  - 6.2. **Commitment;** 'People want their beliefs to be consistent with their values', asking people to make a commitment to the centre/group/sangha
  - 6.3. **Social Proof:** A comparison with what others are doing to support, eg. explaining that X amount of other people also give monthly
  - 6.4. **Authority:** we respond to people we consider to be authoritative, eg. what has Bhante said about generosity? Or the Buddha? Has your centre president endorsed the appeal?
  - 6.5. **Scarcity;** This is probably less relevant to your appeals, but it means; the less of something there is, the more people tend to want it. Linking to scarcity might work well if you are running a match-giving appeal (where you have asked major donors in advance to create a match pot) and then, for example, the persons' gift might be doubled, but only for a short period of time.
  - 6.6. **Liking;** people are much more likely to be influenced and persuaded by those that they like, so in our sangha we are probably at a natural advantage as we are talking about a situation where we are generally amongst friends. It might

be better to think about “familiarity” and making sure that the person doing the ask is well known by the audience wherever possible.

## 7. What makes you specially placed to solve the problem?

### 1.4.5 Personal and Specific Ask

Now we have set out the Vision, Problem and Solution, we come on to the “Ask” itself. Here are some key points to remember;

- State your specific costs; eg. it costs £2,500 a month to run our centre.
- Tailor your ask depending on your audience, give a clear and specific (and ambitious) amount;
  - **Regular Sangha** - ask if your regular Sangha members will “sponsor” the situation by making a regular, monthly donation
  - “Please give regularly to sponsor the centre if you can and you feel moved to - £50 a month will support.....”
  - **Newcomers** - if they have benefited and appreciated the content, they may wish to make a single gift, to ensure others can benefit in the same way in the future
  - “If you’d like to support us, but can’t give regularly, please consider making a one-off donation of £100”

<sup>1</sup> Cialdini’s 6 Principles of Persuasion see <https://cxl.com/blog/cialdinis-principles-persuasion/> 7

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- Make it clear that any gift is welcome; “Anything you can give makes a real difference to us in this situation”

And ask if people can do it **now**:

The more of a gap that there is between asking for a donation and someone making that donation, the less likely it is to happen. This is not because someone necessarily changes their mind, but because they get on with other things and lose track;

- We have a break before moving over into groups - please donate now - [*tell them how*] - complete pledge card ([see pledge card example in Appendices](#)) / follow the link in the description/chatbox/ go to website/ take the groups’ bank details for standing orders/ put cash in the dana bowl

Follow up:

- After the appeal itself, email out to your distribution lists so that those who weren’t present can see the ask and those who were present get the ask reinforced.
- If you have pledge cards, you will need to spend time making contact with those people who have pledged and send them instructions on how to complete the pledge. You may need to send out a couple of reminders



## 1.4.6 Case for support and ask in full

Bringing this together then, our case for support and ask would like this;

### 1. Vision

*[name of centre/group] exists to help the people of ..... to find and practice the Dharma in an atmosphere of spiritual friendship. This changes lives and enriches our international sangha*

### 2. Problem (financial and human)

*But rising energy costs mean that we need to find an extra £2,500 a month to run the centre. If we cannot meet our costs we may have to cut down our activities, or even close altogether. In addition to being a lovely place to meditate and meet like-minded people, what's not obvious is that for some people the centre has been a lifeline. For example, when John started coming to the ..... centre he was suffering from severe depression and couldn't see any point in carrying on. His work was wearing him out and he felt like he couldn't get any peace.*

### 3. Solution

*After coming to our meditation classes for 6 weeks, John feels better able to work with his mind and has had the confidence to talk to his boss about*

*reducing his workload. John says he feels happy for the first time in years. Every year, 2,000 people visit our centre, many of them in a similar situation to John.*

### 4. Personal and Specific Ask

*If you feel that you have benefited from coming to the centre and would like others to benefit like you have and like John has, then please give.*

*It costs £2,500 a month to keep our centre running. If 50 people like you gave £50 a month then we'd cover the extra £2500 it's costing us to run the centre. This would mean we could confidently keep running our newcomers' classes for the next year.*

*We know that we are in challenging times right now, and if you are not in a position to give, then we do understand. If you feel that £50 is too much for you right now, please give what you can, as every gift helps.*

### + Now

*If you think that this is important and you feel inspired to give, I would ask that you act now. We are going to have a break in a moment, whilst you are getting your tea you can use the laptop to access our donation page or you use the link to visit our giving page on your own phone.*

*Thank you.*

[See Appendices for Blank Worksheet to build your Case's for support](#)

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## 1.5 Different Channels for delivery

It's recommended to use a number of different channels to direct people to giving donations:

### 1.5.1 In-person Appeal

Why do an in-person appeal?

- This is probably the strongest form of appeal that you can do; it will generally be during an event or class, people will be inspired and connected and they will naturally be more motivated to make a donation
- It is a very authentic and engaging experience
- Gives chance for people to ask questions after the event

How to do it?

- Prepare by reading this toolkit and by using the Worksheet in the appendices
- Pick your event/ class; think about who will be attending - Newcomers? Regulars? A mix?
- Plan a way for your attendees to act on appeal straight away; have pledge cards ([see example in appendices](#)), a computer available, a link or QR code to your

website/donation page, or your bank details available

- If you use pledge cards, you will need to plan time to follow-up later with calls and emails to ask pledgers to make their donation

## 1.5.2 Website

Why have an appeal on your website?

- Your website is probably one of your main ways of getting information out ● For lots of people, your website is probably the first interaction they ever have with your Sangha
- You can keep files, links, videos, and donation buttons on your website

How to do it?

- Case for support typed up on donate page of website
- Donate now button - sending you to whatever giving platform you use ● Video from the chair (a dana appeal) - on the website when you click on the donate button

## 1.5.3 Email

Why run an email campaign?

- It's possible to reach lots of people.

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- You can include hyperlinks that 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.
- 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.
- 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 [section 1.4.5](#)).
- 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; ie they have opted into being contacted).

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.

## 1.5.4 Phone 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!
- [Template Script](#) available in Appendices

How to do it

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- Calling those you have permission to call through GDPR requirements. • Calling regular supporters— those who give a Standing Order/regular payment. • Late afternoon/early evening (never after 9pm!) is a good time to call. • 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 or in-person 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.

## 1.5.5 Choosing a giving site; JustGiving

Using an online giving platform is a very simple and effective way to secure donations from your supporters. If you choose to use a giving platform to raise money, we are recommending that you use the giving site “JustGiving”, but you are free to research others. We recommend JustGiving because it is a long-standing and trusted platform that is relatively simple and inexpensive to use.

Note using a “start plan” for JustGiving is free, but getting more features will involve an upgrade to their “grow plan” for £15 a month. [See JustGiving plans](#). There is a cost per donation to be aware of, [see here for details](#).

Visit <https://justgiving.blackbaud.com/for-charities> to sign up to JustGiving as your centre or group.

Encourage anyone who wants raise money for you to do this through JustGiving by visiting <https://www.justgiving.com/>

Your supporters can learn how to create a Fundraising Page by watching [a few handy videos on Youtube](#)

### 1.5.5.1 Driving people to the giving site

People will either come through to the giving site from:

- an appeal following a live stream (put links to giving site in chat or description)
- an appeal following a zoom meeting (add link in the chat box, or tell people your URL - keep the URL simple. Remember, once the meeting is closed, people can no longer follow the link, so you want them to remember how to donate)
- direct from the website
- from an email
- from a phone call directing them to the giving page

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## 1.6 Links and others resources

Sikkha Project - Centre Fundraising Support <https://sikkha.online/centre-fundraising-support/>

JustGiving help and Support videos - [https://www.youtube.com/playlist?list=PLIlgGNGIOAju\\_QlaIJ\\_Co7yoEkmIV\\_ZKu](https://www.youtube.com/playlist?list=PLIlgGNGIOAju_QlaIJ_Co7yoEkmIV_ZKu)

Rob Woods' 7 techniques that make it far easier to Ask for money - <https://youtu.be/CT25EBTON8I>

## Section 2 - Communications

### 2.1 Introduction; Communications

'Effective communications are a way to put the Bodhisattva Ideal into practice'

It can be tempting to think of comms and marketing as afterthoughts, only to be factored in if and when you've got time. This is particularly the case in times when resources/workers are stretched, when you're caught up with the day-to-day running of your centre: classes,

unavoidable admin, caretaking and so on.

However, if you're not communicating regularly and effectively with your existing and target audiences, particularly through digital channels, you are continually missing out on the massive potential for growth, retention, relationship-building, and, crucially, sales & fundraising opportunities.

You're also rendering all your hard work in running the centre less effective. Fewer people are benefiting, because your engaged and/or target audiences do not know about what you are doing and, therefore, do not have the opportunity to participate.

I'd urge you to consider developing a communications strategy, which can simply allow you to define what your objectives are, how you're going to realise them, which channels you're going to focus on, who your target audiences are, and so on. See [Appendix iv](#) for an example of a strategic communications plan that you could fill in.

Part of your communications strategy also could be developing brand guidelines which will ensure consistency in your messaging. It'll also help you reduce your workload in the long run, as set templates and brand guidelines will mean that you're not having to create new visual content from scratch every time.

The guide below builds on the resources provided by the Sikkha project: Triratna Communications and Publicity Toolkit. The link to the toolkit is below, although note that some of its content is now out of date!

*Anna - Communications Manager at FutureDharma Fund*

## 2.2 Communications Principles

Bhante spoke about the Order being a manifestation of Avalokiteshvara, reaching out into the world to help people. Our Centres and groups do help people, and even change people's lives, so we need to work together to make sure we reach more people as effectively as possible.

### **5 steps to effective communication**

**Objectives** - What is your aim?

**Audience** - Who do you need to reach to achieve your aim?

**Message** - What is your message and why is it relevant to your audience?

**Content** - What words, images, etc. communicate your message?

**Channel** - Where will you post your content to reach your audience? (Facebook, Instagram, etc.)

### **Be realistic**

Have you got a really small team or are you limited by lack of digital skills or time constraints? Then stick to what is simplest, and do it well. And create a content timeline which is genuinely achievable with the resources you have.

### **Prioritise**

Do you want to focus your efforts on reaching new people, or cultivating your existing sangha? The answer to this question will inform whether you focus your efforts more towards regular newsletters for your existing audiences, or on social media campaigns which focus on spreading the word about your events.

### **Be consistent**

It can be tempting to set up lots of channels and then not be able to keep up with supplying content for each, or set overly ambitious goals (i.e. 'we'll post to instagram twice a day') and then not be able to keep up with the goals you set, and leave the platforms to go cold. This isn't a good look. So try to focus on select platforms and nurture them, rather than spreading out your efforts across lots of different ones, particularly if your centre team has limited resources.

### **Be discerning**

Focus on creating content to select platforms, rather than spreading out your efforts across lots of different ones, particularly if your centre team has limited resources. You can always add to the list later on. For example, your centre might decide to focus primarily on Facebook and YouTube.

### **Digital over print marketing**

If done well, the same £50 spent wisely on digital marketing **WILL** go much further than if spent on posters and flyers. It's not to say that you can't do both, but if you are working with a limited budget, invest in digital marketing on Facebook and Instagram.

### **Work smarter, not harder**

Instead of setting up photoshoots, take pictures of what's already happening at the centre (with consent, of course). Film snippets of Dharma talks or tea breaks to give your online audiences a feel of the vibe! Re-use content across different platforms (like Facebook and Instagram) and then use it again in your newsletter.

### **Measure the effects**

Find out what's working well by tracking engagement in your communications. What are your audiences engaging with most? What sorts of content get the most views, likes, follows, shares, clicks, etc? For some basic insights such as views and likes, depending on the platform, anyone can see this. And for other insights, you can use the analytics tools on each platform, for free. All online platforms give at least some access to insights for your marketing purposes. Google Analytics, Instagram insights, and Mailchimp reports are some examples.



## Lead with a description or Lead with the value?

Consider the below two advert blurbs:

<b>Drop-in Meditation Class</b>	<b>Change your mind, change your life</b>
For beginners or regulars. Change your mind, change your life.	Meditation can be life-changing, and anyone can learn how to do it.
Come to a free class today.	Come to a free class today.

The one on the left “Drop-in meditation class” could be okay in places like Google search, where people are probably already searching for meditation classes quite a lot, but if you’re putting an advert into something like Facebook, or you’re creating a poster that needs to stand out against other posters on the street, you need to lead with the value more; i.e “Change your mind, change your life”.

Consider the context and be creative with how you adapt to it.

## 2.3 Objectives

I’ve touched on this already, but to make sure that you’re working as smartly and economically as possible, get really clear on what your objectives are with your communication. If you’re clear on your ‘why’, the following steps will be more straightforward. Some questions to consider:

- Are you wanting to attract new people to your centre? If so, who in particular? Be as specific as possible when picking your target demographic. **Remember, there’s no**

**such thing as ‘The General Public’.**

- Are you focusing on communicating with your existing sangha to make them feel like they are part of a community?
- Are you leading up to making an appeal or promoting a course or retreat? - Boosting numbers
- Are you looking to grow your online presence on particular platforms? - Are you wanting to drive sales?

You might want to do all of the above, so do your best to prioritise and focus on one or two objectives at a time.

Try to make your objectives SMART:

S - Specific

M - Measurable

A - Attainable

R - Realistic

T - Time Bound

More info on Smart objectives [here](#).

## 2.4 Audiences and messaging

Making your message relevant - how do you talk to your audience?

When you know who your audience is, you can think about how to make your message relevant to that audience so when it reaches people, they're open to hearing it.

Tailoring your message is a form of skillful means

In the parable of the burning house, the Buddha offers the children “toys” and then gives them more than they could have imagined. We should be comfortable with talking about what we do in a way that might sound more like “toys”, as long as what we actually deliver to people really frees them from their burning house.

In 'Comms' terms, The Buddha always makes his message relevant to his audience!

### **Basic principles for tailoring your message**

We tailor messages to our audience naturally when we speak - it's something you would do verbally when delivering an introduction class at your centre, compared to a class for long-standing members of your Sangha. But it's harder to do that with the written word because you don't see people's faces when they're confused about what you've said.

What works for one kind of audience might not work as well for another, so here are some questions to bear in mind when you think about how to do this online with an audience:

What does your audience already know or do?

What do you want your audience to know or do?

How can you clearly state what you want your audience to do?

Why is this relevant to your audience now?

Are you using language that is familiar to your audience? (more on this later!)

What barriers might your audience face?

Is there anything you should emphasize? Or anything you don't want to accidentally tap into?

Remember - you are not your target audience! Do you know anyone close to your target audience that you can check your message with and see what they think? They might suggest a way to communicate that you wouldn't think of.

## 2.5 Content Creation

Informed by your objectives, you can decide what kind of content you'd like to focus on making.

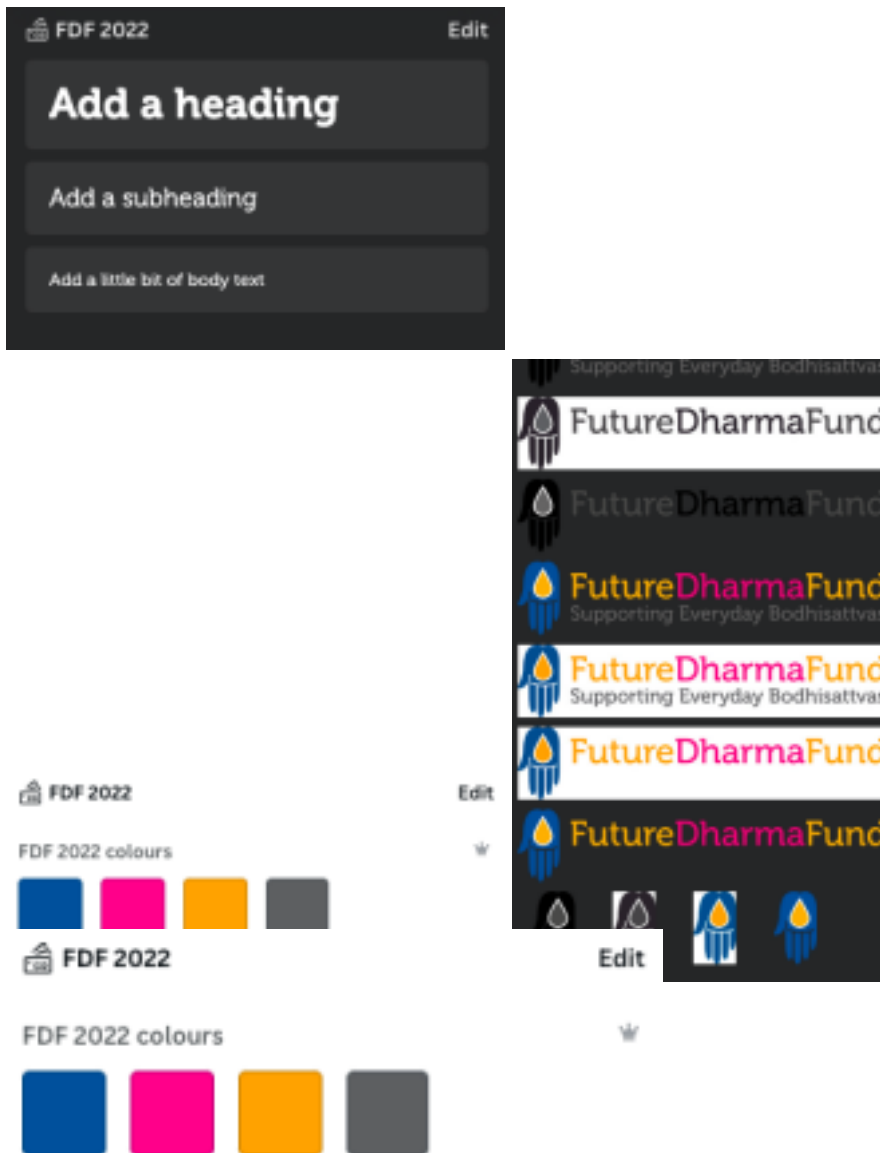
### 2.5.1 General principles

#### **Branding matters**

Let's say you primarily use your website, mailchimp, and instagram to communicate with

your audiences. The nature of the content might differ somewhat between platforms, but what should be consistent is some element of your centre 'brand'. This can be as simple as a colour palette, a set of typefaces, a set of logos and mailchimp templates. If you've got the resources, you might consider working with a marketing or design pro to get a brand document made. It's important that everybody who is making content for you, whether it's volunteers or several of your core team, are on the same page about your branding principles. It has a huge effect.

Low-key example: at FutureDharma Fund, we use canva pro (free for charities) and have a set of logos, fonts and a colour palette, elements of which we use across all of the visual content we create. This is cohesive across our website and all social platforms.



High-end examples (these centres work with graphic design professionals):

### **KISS it**

Keep it [your content] super simple.

Be as brief, clear, simple and economical with your language and design as possible. **Less is more.**

### **Have ONE clear call to action (CTA) per content piece**

How does the content you're creating help you to realise your objective? What is the simplest, clearest way that you can get your message across? What do you want your target audience to **do** when they have engaged with your piece of content? This can be as specific as 'click on a link to purchase a course', 'come to Sangha night', 'set up a standing order' or a positioning goal, such as 'I'd like the target audience to see how friendly/diverse our sangha is!'

## 2.5.2 Images

Graphic design is not subjective. It's not art. It's a communication medium and if you use low quality images you will be communicating that your centre is low quality. Bad graphic design also fails to communicate what you want.

The most common mistake is that people can't read the text on your image because the typography choices aren't clear enough.

Graphic design is a skill, and to make something look really professional, you would have a full-time professional graphic designer making your images. However for most groups and Centres, that will not be possible, so one thing you could do is get a team member or volunteer who is already aesthetically inclined to take a graphic design course. Here are some recommendations:

- [35 min Graphic Design Basics on Skillshare](#) (Free with a trial account)
- [8 week Visual Design + Branding Online Course on SuperHi](#) (£375 - Worth the investment!)

It's much more important that you skill up in the principles of graphic design than in how to use any specific software, but it can be said that software like Adobe Illustrator & InDesign (or their cheaper alternatives made by [Affinity](#)) are much more complicated and designed for advanced use, whereas something like [Figma](#) or [Miro](#) run in the browser and are relatively straightforward to pick up.

If you don't have the resource to upskill at the moment, a good solution is the graphic design platform [Canva](#). Canva pro is free for charities! It helps you create different images, flyers and posters etc by providing templates which can be easily edited.

A good list of design principles is the [Government design principles](#). It's worth reading those and having a think about how they apply to your Buddhist centre or group.

One general rule of thumb of design is less is generally better. Always think about how you can make your design simpler. Whenever you add something ask yourself “Is this element really needed?”

Next to that, think about how you can make your designs consistent as it helps people trust that you are a reliable institution. How to do this well is one of the things you’d learn about with the above course.

### 2.5.3 Social Media

The most important thing to remember about social media is that it creates a conversation online between someone and your centre. It’s two way - rather than broadcasting something out to the world, you have an opportunity to open up a conversation with people and build a community online.

You can use the space for community online that social media creates by following and engaging with other social media accounts, building networks online similar to the networks you have ‘in real life’ - local organisations in your area and other Triratna centres are a good place to start!

The ability of social media to create a conversation means it’s really important to make sure any social media platform you use is checked regularly. There are a lot of social media channels to choose from - rather than rushing out and trying to do something on all the different types of social media, it’s better to choose one or two platforms you can regularly monitor and work at using them well.

If you use social media effectively, you’re likely to get more questions about how people can get involved, which will need to be answered speedily! It’s actually better not to ‘do’ social media, than to have an out-of-date page with unanswered comments and messages!

#### **Who’ll look after your social media?**

As it’s important that social media is checked for messages and updated frequently, it’s a good idea to allocate responsibility for social media to someone you trust who has the time, patience and skill-set to carry out this work.

If you are asking a volunteer to run a social media account, It’s important they feel able to respond to comments and questions accurately and informatively. Your social media account is your centre’s voice online. They must also know when not to respond on their own initiative but get advice from someone else in the Sangha.

#### **Who are you talking to?**

In setting up or reviving a social media page for your centre or group, it’s important to be clear on who you are trying to reach, in your individual posts and also in terms of the channel overall. This will inform the kind of content that you are uploading. If you don’t have a clear

sense of your existing audience, your target audience, and your call to action, your content risks being ineffective. You might want to:

- communicate with people already in your sangha
  - raise awareness about the existence of your centre to a particular group of people (in the local area, or those interested in meditation, for example)
- attract new people to a particular event, series or online class.

### What to post?

In line with your objectives, here are some suggestions of the types of things you could share:

- Updates or news from your centre
- Events, eg upcoming classes or live streams - But we wouldn't recommend posting all your regular classes as events as your website should be better suited for that job
- Fundraising campaigns and messages of thanks to people who support the Sangha
- 'Behind the scenes' posts - to give an insight into what goes on at your centre
- Appropriate or relevant news articles from the media
- Links between things you're doing and national or international days
- Stories from people in the Sangha about their experience of something linked to the centre (eg coming along for the first time, or doing a course)

This list isn't conclusive - don't be afraid to experiment with what you're posting! One of the great things about social media is you can see in each platform's analytics what people are engaging with.

Here are some excellent resources which go into more detail about social media for non-profits.

[Hootsuite: essential tips for success](#)  
[Comprehensive social media guide](#)  
[Instagram reels ideas for nonprofits](#)

## 2.5.4 Mailing list

Emails are a great way to communicate with your existing audience. Whether it's keeping them updated about courses, retreats and centre updates, or making dana appeals, it's key that you're sending regular, targeted emails to your lists. If possible, survey your audience to find out what they want to hear from you. Gather as much information about them as possible and use it to inform the way you communicate with them. If your audience feels valued and appreciated, they'll be most likely to be receptive to your asks when they come.

If using mailchimp, segment your audience and communicate with different audiences in different ways (capacity dependent). For example you may have a tag of GFR mitras, order members, regular donors, volunteers or anything else that feels relevant.

## 2.6 Links

[The Sangrahavastus of Successful Centres](#)

[Tiratna Communications and Publicity Toolkit](#)

[Creating good video content](#)



# Appendices

## Appendix i) Worksheet for Case for Support

Vision	
Problem	
<b>Its essence and consequences</b>	
<b>What's not obvious</b>	
<b>An individual's story, with a focus on their challenges</b> <small>You must get permission to use someone's story</small>	
Solution	
<b>Story; continue/conclude the individual story, with a focus on how they overcame those challenges</b>	
<b>Numerically; set out your solution in numbers</b>	

<p><b>Link to at least one of Cialdini's 6 principles; Reciprocity, Commitment, Social Proof, Authority, Scarcity, Liking</b></p>	
<p><b>What makes you specially placed to solve the problem?</b></p>	
<p><b>Ask</b></p>	

**Personal and Specific Ask**

Appendix ii) Pledge Card example

Pledge Card

**Name** \_\_\_\_\_

**Email** \_\_\_\_\_

**Phone** \_\_\_\_\_

**Pledge Amount**  \_\_\_\_\_

(tick)  One off  Monthly

(tick)  **Subscribe to newsletter**



**I pledge to support**.....

**For £**.....

(tick)  One off  Monthly

## Appendix iii) Phone appeal example script

### **PREPARATION**

Ground yourself

Remember you're calling friends!

Set your intention: to help this person to solve problems they deeply care

### about **A - INTRODUCTION (purpose: etiquette/hygiene)**

Hi, can I speak to \_\_\_\_\_ please?

Hi, my name is \_\_\_\_\_, [I am a Order member/ Mitra training for ordination from the \_\_\_\_\_ sangha]

I am calling on behalf of \_\_\_\_\_ [Name of centre/group]

Is this a good time to talk for a few minutes?

(Pause for answer)

If yes: Thank you.

If no: Then would it be OK if I called you back another time?

### **B - ESTABLISH RAPPORT AND UNDERSTAND THEIR INTERESTS (purpose: they connect with their inspiration)**

We are contacting all of our supporters to thank them for their generosity. So, thank you! With your help as many as \_\_\_\_\_ people visit our centre/group each year and are growing through Dharma practice.

And, we want to help [NAME OF CENTRE/GROUP] reach even more people.

So I'd like to ask you a few questions which will help us with planning for the future. Would that be ok?

(Pause for answer and breathe)

If yes: Thank you

If no, then go to "Ask"

Q. May I ask what inspires/d you to give first come to the centre/group?

Q. Would you like me to tell you a bit about how we use your dana?

(Pause for answer and breathe)

[Give overview] OR go straight to Case for Support

## **C - Case for Support**

See [section 1.4](#) to write your own case for support

## **D - ASK**

### **Confirm Question**

It sounds as if you think we're right to reach out to the world at this time. Is that right?

### **Ready to give in principle?**

I know that you're probably already giving a lot but would you be willing to help our centre/group to reach out to even more people?

### **Specific Ask**

See [section 1.4.5](#) to write your own specific ask

Space. Breathe. (Supporter wants to give)

If YES: Wonderful, thanks!

Then go to the payment section.

If they would like to think about it, ask if we might call back in a few days  
(Make a note of when this might be convenient)

IF NO and if it's appropriate ask if there is an amount you would be able to give?  
(If giving a monthly gift)

### **IF STILL NO**

I understand. We really do appreciate the support you give to us. Our supporters are the lifeblood of the centre/group and without you we would not exist. We hope that you will continue to support us in the future. Go to close and thank them for their time.

## **E - PAYMENTS**

*[You will need to be clear about how the donor makes their gift; are you able to amend it for them? Do they need to set up/change a standing order with their own bank? Can you direct them to your giving page on your website or on a giving site like JustGiving?*

*Make sure you have your centre/groups' bank details ready for standing orders]*

## **F - CLOSE:**

Thank you again for taking the time to talk with me and for your ongoing support, enjoy the rest of your day.

## Appendix iv) Strategic Communications Plan Template

(Adapted from CharityHowTo resources)

### **Overview: Where We Are**

[Roughly one-page summary of who and what this organization or project is, where things stand, and what the challenges ahead comprise. This text should be thoughtful, informative, and easily leveraged for “about” statements.]

### **Goals: Where We’re Going**

The primary goal(s) of this communications plan are.... This work will support our broader institutional or project goals by....

#### Institutional or Project Goals

- Goal 1: Description
- Goal 2: Description
- Goal 3: Description

#### Communications Goals

- Goal 1: Description
- Goal 2: Description
- Goal 3: Description

### **Target Audiences: Who We’re Working With and For**

#### Primary Audiences

##### Group 1

- Describe demographics, interests, and other qualities as relevant

##### Group 2

- Describe demographics, interests, and other qualities as relevant

##### Group 3

- Describe demographics, interests, and other qualities as relevant

#### Influencer Audiences

##### Group 1

- Describe demographics, interests, and other qualities as relevant

##### Group 2

- Describe demographics, interests, and other qualities as relevant

##### Group 3

- Describe demographics, interests, and other qualities as relevant

## Other Audiences

- Group 1
- Group 2
- Group 3

## Strategies and Tactics

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### Strategy 1

- Strategies frame the big picture of your work and lay out the driving motivation behind the tactics you choose
- Tactics are specific actions and activities that execute the strategy in practical terms

### Strategy 2

- Nesting tactics within defined strategies ensures that your day-to-day work is occurring with purpose and intent
- It's okay to repeat similar tactics for different strategies—you may want to use the tools at your disposal to do different things!

### Strategy 3

- Lead with verbs as much as possible in stating both strategies and tactics • Think creatively but realistically about what you can achieve with the team, budget, and capacity you have available

## Messaging

### Topline Messages

#### Key Tenets

- Mission
- Purpose
- Vision

### Elevator pitch

[Short statement (<250 words) explaining who you are and what you do in non-technical language, aimed at an audience that knows very little about your work.]

### Supporting Messages

#### Key terms and definitions

- Item 1: Definition
- Item 2: Definition
- Item 3: Definition

### Framing statement

- Talking points that explain the situation at hand
- Talking points that advocate for and advance your point of view
- Talking points with supporting evidence

## Frequently asked questions

Question 1?

Answer

Question 2?

Answer

Question 3?

Answer

## Tricky Questions

- Question 1? Answer
- Question 2? Answer
- Question 3? Answer

## **Timeline** [Overall timeframe at hand]

### Phase I

Timeframe

- Details as appropriate

Activities

- Details as appropriate

Benchmarks

- Details as appropriate

### Phase II

Timeframe

- Details as appropriate

Activities

- Details as appropriate

Benchmarks

- Details as appropriate

### Phase III

Timeframe

- Details as appropriate

Activities

- Details as appropriate

Benchmarks

- Details as appropriate

### Phase IV

Timeframe

- Details as appropriate

Activities

- Details as appropriate

Benchmarks

- Details as appropriate

