

BEST PRACTICES TOOLKIT

Fundraising for Non-Profit Naturalization Programs

Best Practices

Best practices are operating processes that produce consistently better results than other techniques. We glean best practices from the good practices of frontline organizations and leaders, and improve them through reflection, feedback, and experimentation. Best practices may be born through the efforts of one community and transformed when they are adopted by others in a new context, but the underlying understanding of their utility remains constant and is always measured against desired results.

About This Series

Identifying and spreading best practices requires a learning network for peer-to-peer exchanges of ideas. This toolkit series serves as one mechanism for us to share and build on best practices.

About This Toolkit

The New Americans Campaign is invested in the sustainability of naturalization programs across the country. One way the Campaign has fostered new fundraising and sustainability strategies for local naturalization programs is through our Experimentation Fund for Optimizing Revenue-raising Techniques & Streams (EFFORTS). This toolkit describes the tips and best practices shared by Campaign partners that participated in the EFFORTS program between 2018 and 2020.

About EFFORTS

In January 2018, with support from Carnegie Corporation of New York, the New Americans Campaign launched the Experimentation Fund for Optimizing Revenue-raising Techniques & Streams (EFFORTS) to help strengthen the fundraising capacity of Campaign partners. The EFFORTS fund prioritizes funding projects that diversify funding streams, cultivate and grow partnerships, are replicable, and where the dollars raised and return on investment can be tracked. Over the course of four funding cycles from January 2018 to August 2019, the EFFORTS fund committed more than \$300,000 through 25 grants to 15 Campaign locations across 11 states. It is in large part thanks to this program that the Immigrant Legal Resource Center (ILRC) was able to gather best practices for this toolkit.

As Campaign partners receiving support from the EFFORTS program experimented with fundraising ideas ranging from matching gifts campaigns to soliciting past clients, several themes became evident. These include the importance of relationship-building, developing a case for support, storytelling, building a bank of images and video assets, and leveraging volunteers.

Fundraising Is the Result of Strong Relationships

As seen throughout the strategies described in this toolkit, the most effective fundraising strategies rely on building authentic relationships. Campaign partner International Institute of Minnesota notes that a major learning from their EFFORTS fundraising experiment is that fundraising is dependent on relationships, and that these relationships grow along with a program's fundraising activities. As organizations brainstorm potential fundraising strategies, it is a best practice to identify existing or known relationships that may be deepened with a fundraising strategy, such as relationships with volunteers, former board members, and media contacts. The philanthropic support from these constituents is oftentimes the result of meaningful and authentic relationships.

Understanding the Donor Life Cycle to Build Stronger Relationships

There are five steps in the donor giving cycle: identification, qualification, cultivation, solicitation, and stewardship.

1. **Identification** is the process of finding people who may make good funding prospects. These are people who may be known to you or your organization. The relationship may be held by a staff member of your organization or it may be held by a close volunteer of your organization.
2. **Qualification** is the process of researching whether your identified prospect is worthy of your organization's time. That is to say: did your research reveal that there is actual alignment between the prospect's interest and your organization's mission? If so, they should be added to your list of potential funding prospects.
3. **Cultivation** is the process of engaging the prospect with your organization. This can be done by including them in communications from your organization, inviting them to events, asking them for a call to explore their interest in your mission, or preparing a volunteer or colleague who may already have a relationship with the prospect to talk about your organization and its impact in the community. This is an important step, but organizations must be mindful that the cultivation process may also reveal that the prospect is not interested in helping to fund your organization. Instead of cultivating them for a gift, the better strategy may be to cultivate them as a volunteer, so that you can tee them up for a solicitation down the road or, possibly, not at all. This is fine because cultivation is meant to help reveal how likely it is that you may get a contribution in support of your organization's work.
4. **Solicitation** is the process of making a request for financial support for your organization. Sometimes you get a hearty yes, but you may also get a no. Always explore the no. Does no mean "No, not now," or "No, that ask amount is too high," or "No, I prefer to give to other causes."
5. Finally, the most important step is stewardship. **Stewardship** is the process of thanking the donor for their support as well as making certain that they are updated about the impact that their gift will have on your organization. Give the donor the opportunity to volunteer at workshops so that they can see their donation in action. This is a great way to build loyalty to your organization. Stewardship that is done right will make it easier for you to ask the donor for another donation for your work. From start to finish, the identification to stewardship process takes anywhere from 12-18 months. It is a long process, but well worth your organization's efforts. This is why relationship building is critical to your work and your organization's long-term financial stability.

Relationships can also lead to tremendous in-kind support or non-monetary contributions that maximize the effectiveness of a fundraising strategy. For example, Hispanic Unity of Florida (HUF) leveraged their relationship with media partners as they launched an “adopt a citizen” fundraising campaign encouraging individual donors to help their neighbors become U.S. citizens. HUF worked with a marketing and communications firm to produce radio spots and digital assets for Facebook, and then partnered with Comcast/NBC Universal’s Telemundo division as well as Univision to air the PSAs. The PSAs were valued at more than \$250,000 in media spend. Although HUF was not able to ask for donations in these PSAs, they focused the PSAs on a call to action: asking viewers and listeners to help their neighbors become a U.S. citizen. The PSAs also delved deeper into sharing the benefits of U.S. citizenship. Moreover, the calls to action directly linked to HUF’s webpage where their fundraising campaign was clearly displayed.



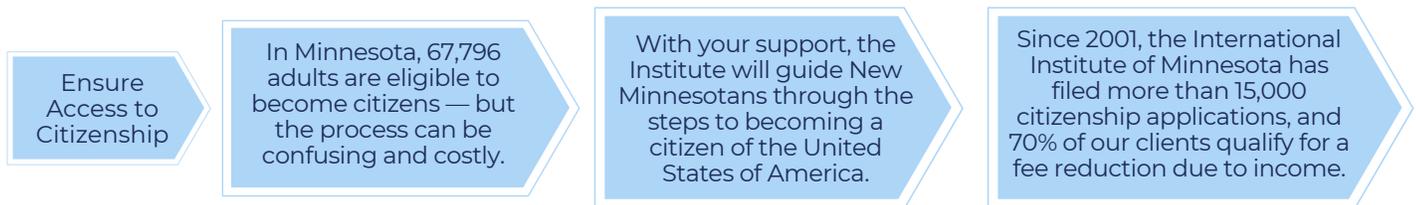
Watch the full PSA at: <https://youtu.be/qInB8BkjlCg>

Develop a Compelling Case for Support

The YMCA of Metropolitan Los Angeles (YMCA-LA) suggests that developing a case for support is a foundational building block of many giving campaigns. A case for support is the principal message to an organization’s donors as to why they should donate to their organization and program. The YMCA-LA recommends following this format in drafting a case statement:



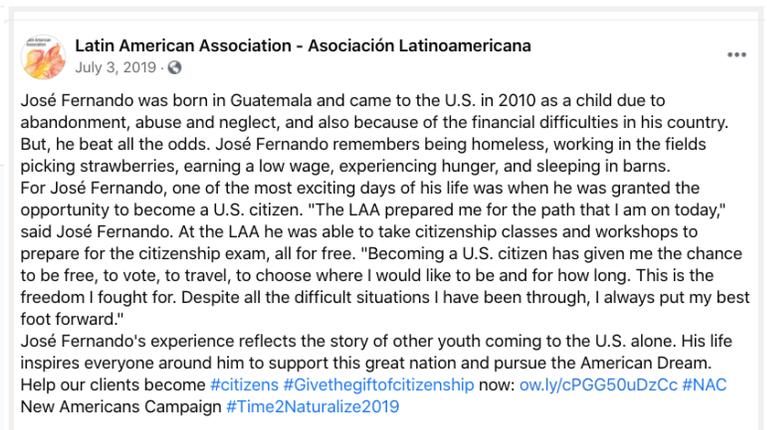
Below is a sample case statement based on information found on the International Institute of Minnesota’s (IIMN) fundraising campaign website.



Additional fundraising material, such as those noted in the matching funds strategy described below, also detail the impact and benefits of naturalization. See IIMN’s full case statement incorporated to their giving page here: <https://iimn.z2systems.com/np/clients/iimn/donation.jsp?campaign=104&>

Use Storytelling to Build Your Case

In many ways, giving is an emotional experience. One of the best ways to appeal to emotions is through storytelling. As such, Campaign partners must be prepared with impactful stories to share with their supporters. For the Latin American Association (LAA) serving lawful permanent residents across North Georgia, a major victory of their EFFORTS grant was the collateral and social media pieces created for their campaign that can also be used well into the future for other campaigns. The LAA's resource development and immigration departments worked together to create powerful email and social media campaign pieces to communicate how significant the impact of becoming a citizen can have on a family and how the LAA helps individuals become citizens. The Latin American Association developed a photomontage and series of individual stories to support their online fundraising campaign around the Fourth of July to inspire individual donors to "give the gift of citizenship" and contribute funds to grow the LAA's naturalization legal services. Also important is for these stories be paired with photos of new Americans and other compelling visual elements such as this photo:



Staff, volunteers, and even clients should be trained on how to share their story. The YMCA-LA recommends developing a script and practicing it so that it sounds natural and authentic. The following storytelling script has been adapted from the YMCA-LA:

STORYTELLING SCRIPT

I've been involved with [organization's name] since [year].
My first experience with [organization's name] was as a [role] when I [describe how you first got involved].
Currently, I am [role] and serve the community by [describe what you do].
The person I am most thankful for meeting at [organization's name] is [first name].
They came to [organization's name] for [program/service].
What inspires me about them is [describe inspiration].
[Organization's name] has helped him/her by [describe impact of service]."

Develop Compelling Images and Video Assets

New Americans Campaign partners repeatedly reported a major benefit of their fundraising activity was the investment in fundraising assets that created an identity for their naturalization program and elevated the visibility of their naturalization fundraising efforts. This included strong photography, videos, and graphic design to include in emails, on social media, and at live events. For example, Chicago partner Hanul Family Alliance (Hanul) used their EFFORTS grant in part to create and develop a promotional video for their naturalization program. Hanul recruited a talented videographer personally committed to their mission, as well as a personable client who had recently passed her citizenship interview. With the naturalization video production in hand, Hanul reached out to potential donors outside of their usual client and donor pool and raised donations specifically for their naturalization program.



The final production can be found through the link here: <https://vimeo.com/332656041/53fe3de902>

Convert Volunteers to Donors and Donors to Volunteers

While experimenting with various fundraising strategies, Campaign partners also learned that volunteers play a critical role in managing volunteer cultivation strategies, as described later in this toolkit, and that donors can also become volunteers. For example, the YMCA of Metropolitan Los Angeles found that their past client solicitation strategy was also an effective volunteer recruitment tool. They noted that volunteer time also equates to funds saved. The Phoenix office of International Rescue Committee (IRC-Phoenix) discovered that the biggest donor to their volunteer-run crowdsourcing campaign was an immigration attorney. As a result, an IRC-Phoenix staff member reached out to the donor-attorney and successfully recruited her to provide pro bono representation for immigrants who are in removal proceedings or need T or U visas. The International Institute of Minnesota also reports that donors have really enjoyed becoming involved in supporting citizenship classes or volunteering at group processing workshops.

Always Say Thank You

As previously mentioned in the Donor Life Cycle box, thanking donors is part of donation stewardship. Campaign partners repeatedly noted the importance of saying thank you right away, saying thank you regardless of gift amount, and saying thank you in a variety of ways including phone calls, emails, and letters. International Institute of Minnesota shared this Facebook post as one of several ways to say thank you to donors that contributed to their matching gift fundraising campaign.



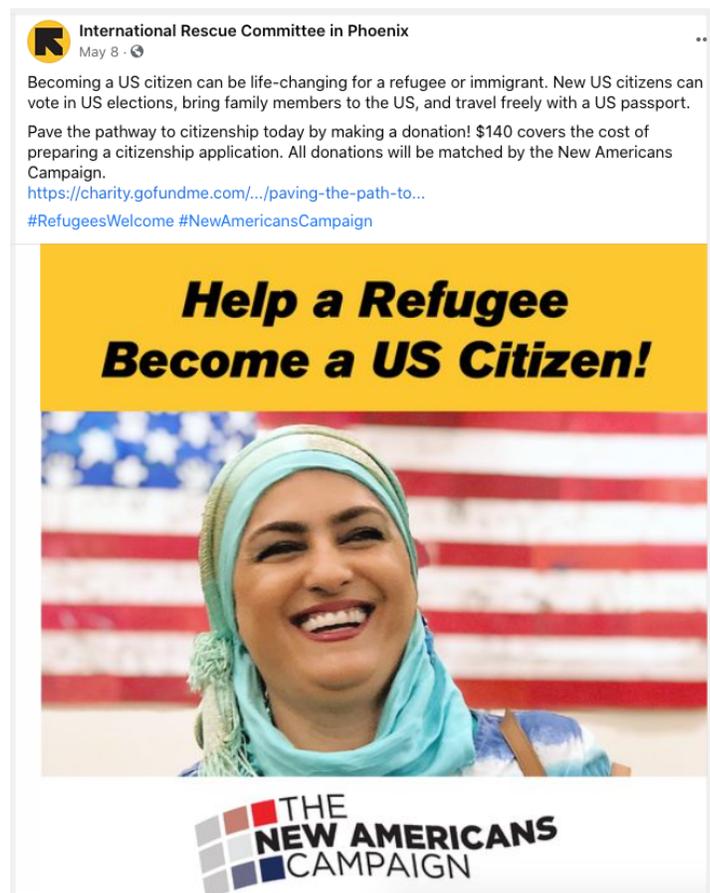
STRATEGY SPOTLIGHT: MATCHING GIFT ONLINE FUNDRAISERS

Matching gift campaigns can be an excellent way to engage new donors and raise more funds from individual donors, according to several Campaign partners that experimented with matching gifts online fundraisers.

The Phoenix office of the International Rescue Committee (IRC-Phoenix), for example, launched a crowdfunding campaign via GoFundMe to encourage business owners to donate and support IRC-Phoenix clients in becoming U.S. citizens. The GoFundMe page highlights that “\$140 helps one person apply for citizenship” by covering the cost of preparing their application and that “when your business donates to this campaign, you gain exposure, promotion, and tax benefits.”

An IRC-Phoenix volunteer led this project and began by developing the content for the GoFundMe page, as well as reaching out to all businesses that had liked or loved IRC-Phoenix on Facebook or Instagram since 2015 to acquire an initial base of outreach.

Additionally, the volunteer compiled a list of over 80 personal contacts who are also local business owners to engage as potential donors. IRC-Phoenix used email, social media, texting, and phone calls to outreach to potential donors. The volunteer also provided education to donors and other stakeholders about IRC-Phoenix’s citizenship activities and services. IRC-Phoenix notes that timing the donations is crucial with a crowdsourcing fundraising campaign. They requested donors make their contributions by noon on the first day the campaign went live to demonstrate the fundraiser was legitimate, well-supported, and built momentum to attract even more donors.

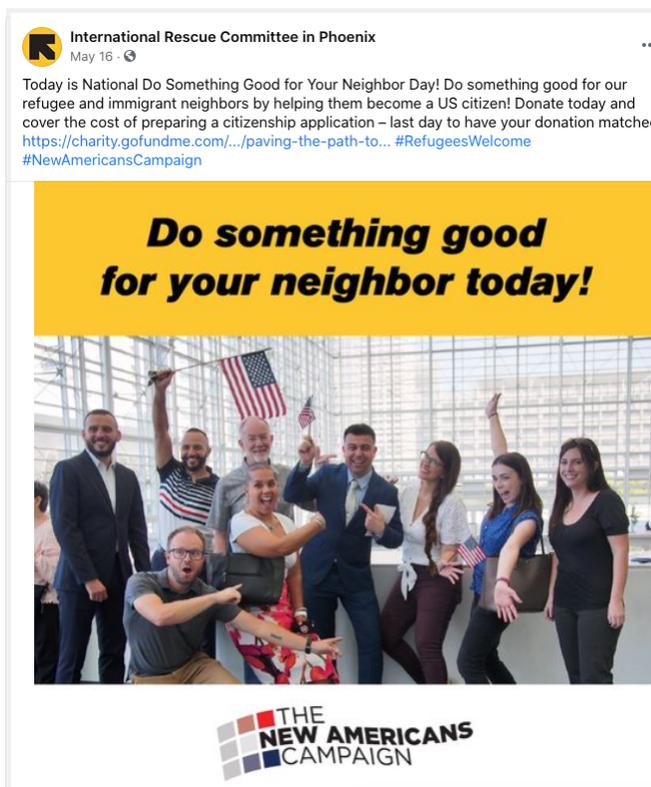


TIP

Asking for a specific dollar amount or dollar range is more effective than not specifying a dollar amount. IRC-Phoenix, for example, specifically noted that by covering the cost of preparing an application, “\$140 helps one person apply for citizenship.” And the International Institute of Minnesota states that “\$50 helps one person apply for citizenship because every gift in the month of July will be matched.” For an email campaign, you may also consider asking people who have made gifts before to increase their support. For example, “Thank you so much for your gift of \$25 last year. Would you consider a gift of \$50 this year?”

The Latin American Association experimented with a Give the Gift of Citizenship matching fund campaign launched on Fourth of July, but found more success fundraising during #GivingTuesdayNow, an international day of giving in response to increased community needs due to COVID-19. Led and shepherded by LAA staff and board members, this campaign was also run as a matching gift campaign. It was promoted more heavily than previous summer campaigns had been, assisted by the software offered through the #GivingTuesdayNow organizers. Because of this, it resulted in a more compelling case to donors than before.

Catholic Charities of Orange County, who also experimented with a Go Fund Me Campaign recommends having flexibility around the timing of a matching gift online fundraiser. For example, if the public’s attention is focused on another immigration or humanitarian crisis, consider launching the campaign at a later time. Catholic Charities of Orange County launched their citizenship crowd funding campaign at the same time as the family separation crisis, and believes that the national and local spotlight on that pressing issue was not a good time to launch this type of fundraising campaign.



How to Raise the Match

With their EFFORTS grant, New Americans Campaign partner CASA set out to raise matching funds for their AmeriCorps naturalization program in York, Pennsylvania. Their first step was to create a video to tell their story and deepen existing relationships. This relationship-building work began with pitching the idea of a match to local government officials, which was secured after several month of cultivation. Building off this initial success, CASA successfully asked three financial institutions with a local presence, and whose business philosophy aligned with the goals of the naturalization program, to join the local government entity by contributing matching funds. Next, CASA approached foundations and organizational partners focused on citizenship and naturalization services and succeeded in securing two additional grants supporting the matching funds for their first year of the AmeriCorps program. In addition to securing financial commitments for matching funds from these diverse sources, CASA also made connections with important community partners to secure in-kind support such as co-hosting future events and fundraising efforts.

The International Institute of Minnesota also notes that while a matching gift fund is a particularly successful strategy in attracting new donors, fundraising for a matching gift pool can generate even more fundraising opportunities including targeting major donors. Building off their Facebook fundraiser (described in more detail in the Peer-to-Peer Solicitation strategy below), IIMN sought to secure major donors for their naturalization program by creating a matching gift pool they called the Challenge Fund. IIMN found that fundraising for the match is an incentive for existing donors to increase their current giving and an incentive for new donors to give for the first time. Key to their success was developing marketing collateral and utilizing organizational staff, rather than an outside consultant, to prospect, call, and send inquiries to prospective community supporters and foundations. This way, staff can develop and foster these relationships year over year. IIMN notes that with each year, their organization grows overall donations to the citizenship program, awareness by donors and prospective donors about the importance of access to citizenship, and the total number of donors that can be solicited again for support.



IIMN sample Challenge Fund Pledge marketing collateral and form that IIMN developed.

<p>International Institute of Minnesota</p> <p>The International Institute of Minnesota empowers immigrants and refugees to achieve full membership in American life through refugee resettlement, immigration services, career development and English language learning.</p> <p>The New Americans Campaign</p> <p>With your help, the International Institute of Minnesota can bring the power of citizenship to more New Americans. The Institute's citizenship program helps New Americans navigate some of the most cited barriers to applying for citizenship, including the cost of legal representation. We also help low income people apply for fee waivers and offer free classes to prepare for the exam and interview.</p>	<p>Benefits of U.S. Citizenship</p> <ul style="list-style-type: none"> • The Right to Vote • Priority in petitioning to bring family members to the U.S. • Obtaining citizenship for children born abroad • Becoming an elected official • Access to higher paying jobs • Increasing homeownership 	
<p>1184 New Americans applied for citizenship with Institute assistance last year.</p>	<p>94% of applicants who apply through the Institute become U.S. Citizens.</p>	<p>70% receive fee waivers, to eliminate, or reduce the \$725 application fee paid to USCIS.</p>



"Citizenship is very important. We became citizens so we can work and travel...and it can protect us."

Nang became a U.S. Citizen with the Institute's support. Now she volunteers her time to help others apply.

You Make It Possible

When you give, you make it possible for New Americans to achieve U.S. Citizenship. Your donation invests in a proven program: nearly 13,000 New Americans have achieved Citizenship with the help of the Institute. From eligibility screening, preparing an application and studying for the interview, our accredited representatives are a trusted resource, supporting clients every step of the way.

Ensure Your Impact Goes Further: Support the Challenge Fund by June 30

Gifts pledged by June 30 will be combined to create a matching gift pool to fund Citizenship services through the New Americans Campaign, beginning July 2019.

Challenge Fund Gift Levels:

 Champion	 Leader	 Investor
\$5,000 or more annually	\$4,999 – 2,500 annually	\$2,499 – 1,000 annually

To support the Challenge Fund complete the enclosed gift form or visit iimn.org/NewAmericansFund

Helping New Americans achieve self-sufficiency and full membership in American life.

iimn.org

The New Americans Campaign Challenge Fund Pledge Form

Yes, please utilize my contribution to challenge others to give during the Institute's July 2019 New Americans Matching Gift Challenge. My gift will be combined with others to create a matching gift challenge, making citizenship possible for even more New Americans. Your pledge or financial gift must be received no later than June 30, 2019 to participate.

Gifts of any amount can make an impact. Donors contributing \$1,000 or more will be recognized as contributors in Institute publications and online.

Name _____

Check here if gift is to remain anonymous

Billing Address _____

City, State, Zip _____

Contact name (if different from donor name) _____

Phone _____ Email _____

Direct gift \$ _____

Please make checks payable to: International Institute of Minnesota EIN: 41-0693912
Or complete the credit card information below:

Card Number _____

Expiration Date _____ Security Code _____

Pledge \$ _____ paid in (circle one) 1 2 3 installments by September 30, 2019

Return form to:
International Institute of MN
attn: Cori Ertz
1694 Como Avenue
Saint Paul, MN 55108

Please contact Cori Ertz with questions: 651-647-0191x366 or Certz@iimn.org



www.iimn.org | 651-647-0191

STRATEGY SPOTLIGHT: PEER-TO-PEER SOLICITATION

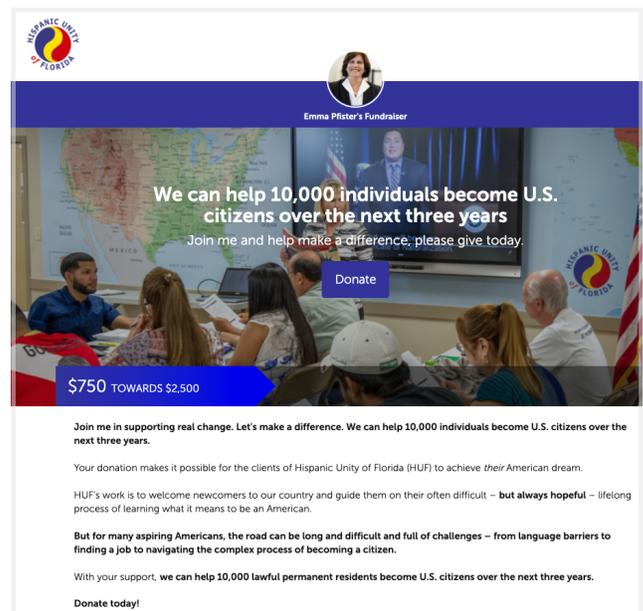
People give to people. Peer-to-peer or ambassador fundraising enables a donor to fundraise from their peers and network. Leveraging these peer relationships can be an effective fundraising strategy. International Institute of Minnesota enabled their supporters to set up individual fundraising pages on Facebook to solicit donations from their friends for IIMN's citizenship program. To start, IIMN created materials to inspire supporters to launch independent fundraising pages, and personally recruited individual ambassadors well in advance of their campaign. These ambassadors included staff members, board members, and other engaged supporters. IIMN found this diverse cross section of ambassadors a promising way to reach a broader audience, but cautions staff to work closely with these ambassadors to obtain full contact information for donors contributing via a Facebook campaign.

Hispanic Unity of Florida launched an ambassador giving program for board members where board members created peer-to-peer donation pages. To the right is an example of one such page.

Other partners such as Los Angeles partner PARS Equality Center (PARS) also experimented with an ambassador giving model as part of their EFFORTS grant. For example, a former client organized a naturalization information session and fundraiser at her local mosque where PARS staff presented about the benefits of naturalization. Then, the former client reached out to her circle of friends for donations to PARS' naturalization program.

TIP

When a supporter of an organization runs a Facebook fundraiser, the benefiting organization receives the names of donors, but no additional contact information for the individuals giving through the ambassador's fundraiser. It is therefore impossible to resolicit past donors or steward those donors individually without the cooperation of the individual ambassadors that hosted the fundraisers. As a result, the organization must work closely with their ambassadors to obtain this critical information.



STRATEGY SPOTLIGHT: GIVEAWAYS

Campaign partners also experimented with the use of incentives such as giveaways. Hispanic Unity of Florida found that selling or giving away items like T-Shirts and hats and related fulfillment activities were not effective fundraising tools or incentives to attract donations. They suggest Campaign partners who are considering incorporating a premium item, such as a shirt or hat, to first test the idea to determine if it will actually motivate new donors to give and to remain engaged with your organization. Remember that by giving a premium to a donor, the value of that gift must be deducted from the tax-deductibility of any contribution made to your organization because it is considered a good received in exchange for a donation. For example, if a donor gives \$25 and received a hat valued at \$10, the tax-deductible portion of their \$25 gift is \$15 (\$25 less the value of the hat.)

STRATEGY SPOTLIGHT: FUNDRAISING EVENT

Several Campaign partners used their EFFORTS grant to host fundraising events. During their annual benefit dinner event, Hanul Family Alliance created a separate station with a “Giving Board” activity solely focused on raising donations for their naturalization program, linking it with the video referenced earlier in this toolkit.

The South Asian Network (SAN) hosted a Citizenship Celebration luncheon to honor and celebrate naturalization clients SAN assisted in becoming citizens, highlight the stories of pioneering South Asian immigrants, and inspire individual donors to give. Adapting a citizenship celebration into a fundraiser helped SAN home in on donors specifically interested in citizenship and to secure sponsorship from a local law firm. SAN recommends beginning the planning process as much as a year in advance in order to secure venue locations and sponsorships.

In an effort to raise funds specifically for their citizenship work, PARS Equality Center created a Naturalization and Immigration Assistance Fund giving category as part their annual fundraising gala. Prior to the gala, staff successfully reached out to potential donors and invited them to attend the fundraising gala as an honorary guest if they donated specifically to the naturalization program.

Akron Campaign affiliate Asian Services in Action (ASIA) planned and implemented an online pledge drive culminating in a Speaker Series. The Speaker Series was marketed as a campaign to support new Americans during Asian heritage month and to introduce ASIA's new CEO to the community. New supporters contributed to the fundraising campaign and existing donors increased their donations multiple-fold to support ASIA's naturalization application services and in recognition of ASIA's new CEO.

STRATEGY SPOTLIGHT: SOLICIT FROM PAST CLIENTS

In addition to being ideal outreach ambassadors and peer-to-peer fundraisers, past clients also have the potential to become meaningful donors themselves. As part of their EFFORTS grant, the YMCA of Metropolitan Los Angeles sought to specifically convert clients to donors. They had success in doing so by revising their exit survey to include questions regarding donating funds or volunteering time to support their naturalization services. The YMCA-LA decided to ask clients if they would like to support their citizenship efforts during the exit process, rather than during the intake process, because they found that clients arrive to appointments stressed and eager to complete their naturalization applications quickly. They offered multiple ways the applicants could support the program, including by becoming members, by giving a donation, or by volunteering time to support client naturalization application assistance. The YMCA-LA found that after the naturalization application is complete, clients feel relieved and appreciative of the service. They bring a unique understanding having gone through the process and can serve as excellent ambassadors.



SAN created this invitation for their citizenship celebration.

STRATEGY SPOTLIGHT: FUNDERS BRIEFING

A funders briefing is an event or meeting that convenes a group of representatives from any type of foundation with the purpose of raising awareness about and/or funds for an organization's or Campaign site's services. New Americans Campaign partners such as Florida Immigrant Coalition (FLIC) and the YMCA of Metropolitan Los Angeles found that funders briefings are a great way to gather partners, subject matter experts, and funders to learn and share new ideas, and, most importantly, highlight their naturalization work to secure funds.

How to Plan a Funders Briefing

YMCA of Metropolitan Los Angeles recommends the following process when planning a funders briefing:

1. Specify the purpose of your convening or funders briefing

Figure out the purpose of your convening and define what your idea of "success" will be. Is it to raise funds? Is it to highlight your work? Is it to plan for the future? This will set the framework for your event planning and inform which speakers, panelists, moderators, and attendees to invite who will make the event successful.
2. Gather a diverse and resourceful team of staff and volunteers to plan and execute the funders briefing
 - **Visionary** – will set the overarching ideas relating to the purpose of your convening
 - **Organizer** – will keep the team on track and ensure that timeline and deliverables are met on time
 - **Connector** – will be tapped into the community and will know who to invite as speakers, panelists, moderators, and attendees to ensure a meaningful event
 - **Designer** – will create visual representations of what the team has in mind to help the convening move along, for attendees to bring something back to their organizations, and to ensure a fun and energetic theme
 - **Decision-Maker** – will make executive calls and be your executive sponsor when you might need higher-level buy-in or final calls
 - **Partners** – the most important part of this work, since we cannot do it all alone, are our partners who will collaborate with us in providing ideas, reviewing content, and providing suggestions. Celebrate and recognize all partners in this work. Relationships will be what sets your organization's success apart from others.
3. Plan an actionable and unique experience
 - Meet frequently to plan the event
 - Utilize the expertise of your speakers, panelists, moderators, and attendees to craft the event's content, acknowledging that we do not work in siloes
4. Promote and grow your event
 - Gather video or visual highlights
 - Share broadly
 - Continue convening a smaller select group of volunteer-driven experts
 - Collaborate with others in subject areas that overlap
 - Plan for sustainability by building a case for support (funds, volunteers, resources)

FLIC invited 80 key stakeholders to join their funders briefing titled “Passport to America: Journey to Citizenship,” including major donors, and representatives of foundations, government, and partner organizations. This funders briefing was a brunch hosted in FLIC’s office. Participants had the opportunity to tour the facilities where naturalization clinics take place, and to meet citizenship staff, volunteers, and attorneys. The program featured naturalized individuals who shared their citizenship journey and FLIC’s impact. Sharing the stories of volunteers and applicants at the briefing is a great and meaningful way to connect funders to an organization’s mission. FLIC also suggests making a concrete ask of attendees during the presentation.

FLIC recommends starting planning for the funders briefing about three months in advance. They suggest starting with research on the interests and funding history of funders and donors to make sure that the event matches their current priorities. This also helps organizations know that they have the right people in the room. Based on this research and experience, FLIC recommends initiating direct conversations with funders before sending the invitations, beginning with those with whom an organization has an existing relationship. Then, organizations should ask current funders to introduce them to other funders to grow the guest list. FLIC followed up the briefing with a thank you note within ten days of the event to thank attendees, remind them of the experience, and to make a follow up ask for support.



FLIC created this invitation for their funder's briefing.



Manuel Pastor
Director of the Program for Regional Equity, University of Southern California

The YMCA of Metropolitan LA recommends inviting local subject matter experts to speak about pressing naturalization issues.

STRATEGY SPOTLIGHT: ANNUAL CAMPAIGN

FLIC also implemented an annual appeal campaign for the Florida New Americans program. During the campaign, FLIC encouraged community members to make both one-time and monthly/recurring contributions to the Florida New Americans program. Donors were engaged directly via email and phone calls. FLIC also utilized social media posts to drive donors to their membership page.

The YMCA of Metropolitan Los Angeles also hosts an annual, volunteer-led campaign over four to six weeks. The YMCA-LA recommends training volunteers, focusing on building relationships, asking for meaningful gifts, saying thank you right away, and reporting back to donors and campaign volunteers on the impact of their gifts of time and treasure.

Tips For A Successful Ask

Based on their extensive experience with annual campaigns, the YMCA-LA suggests that the most effective ask is made (1) in-person; (2) in a peer/network relationship; (3) asking for a specific dollar amount; (4) to a prospect that has had involvement in your specific cause—naturalization, in this case. If it is not feasible to make the ask in-person, then they recommend a combination of email and live contact by phone. Examples for incorporating elements of this ask can be found throughout this toolkit, including peer-to-peer solicitation, asking for a specific donation amount, and fundraising for a specific program. The YMCA-LA also suggests to always say thank you regardless of whether a gift was made. Other Campaign partners echo this sentiment.

STRATEGY SPOTLIGHT: FEE-FOR-SERVICE

Several Campaign partners utilize a fee-based model to sustain their naturalization services. Drawing from the experience of other New Americans Campaign partners, Florida Immigrant Coalition successfully developed a scaled fee service for their in-office monthly clinics. These office appointments serve as an additional revenue stream for FLIC and as an alternative for applicants who cannot attend the free citizenship workshops or who prefer a different service model. Applicants and their families are also actively encouraged to support the program through donations.

In their manual *Managing an Immigration Program: Steps for Creating and Increasing Legal Capacity*, NAC National Partner Catholic Legal Immigration Network, Inc. (CLINIC), describes best practices in the use of fee income as a funding source. Here is a portion reproduced:

Fee Income

Managing an Immigration Program: Steps for Creating and Increasing Legal Capacity A Manual by Catholic Legal Immigration Network, Inc.

Some programs have a mission that precludes them from charging fees, but for other organizations charging fees makes good business sense. First, fees are a steady and reliable source of income. Fee revenue protects the agency from the ups and downs of other income sources. Second, anecdotal evidence suggests that clients value services they pay for more than services they receive for free. Program managers have reported that when they charge fees, clients more reliably show up for appointments and follow legal advice.

Determining a fee schedule will depend on several factors, such as the fees charged by other legal service providers, the economic profile of the client base, and the desired percentage of reduced or waived fees.

As stated earlier, flat fees and sliding scales of payment are both allowable methods of payment for a 501(c)3 organization. The IRS does allow fees to be increased when deemed necessary. Fee increases should be based on a measurable factor, such as rise in cost of living or inflation. Fee increases can also be made in an effort to match fees charged by other local 501(c)3 organizations. Finally, fees can be increased as long as they remain lower than those charged by non-tax-exempt organizations or if the fees charged remain lower than the cost to the organization to provide the service.

What the Market is Like: What Other Local Programs Charge

If your program operates in an area with other immigration legal service providers, you should learn what those agencies are charging. If your agency charges significantly more, you may find that clients take their business to the agency with lower fees. Note, however, that if these other agencies are engaged in unauthorized practice of law (e.g., they lack DOJ recognition and accreditation or an attorney on staff), and they charge extremely low fees, you may be able to educate potential clients about the superior services your recognized and accredited or attorney-staffed agency is able to provide. See Chapter Five for a discussion of the benefits your recognized and accredited or attorney-staffed agency may provide to clients.

Cost to Provide the Services

Fees should reflect the cost to the agency of providing the services. The more time-intensive the service, the more you should charge for it. Use the following formula to determine what it costs the agency to deliver a particular service: [see page 113 for visual]

1. Determine the cost to run the program per year: caseworker salaries, plus benefits, plus agency overhead. Divide that by the number of hours per year your caseworkers work on immigration services. This number is the cost per caseworker hour of providing immigration legal services.
2. Multiply the cost per caseworker hour by the amount of time it typically takes a caseworker to deliver a particular service. This number represents the cost to the agency of providing the service. When determining how long it takes a typical caseworker to deliver a particular service, be sure to factor in the scope of the service: if you will be providing representation at a naturalization interview, for instance, the time to complete the service will be a lot greater than if you were merely helping the client fill out the application. Remember to add in an appropriate amount of caseworker time for managing the case. In general, this includes notifying the client when a benefit matures and monitoring the case until such time. Many program managers are surprised when they add up all the time that goes into this on one case and realize that it is multiplied by hundreds of cases their agency is handling.

Also, remember that you may need to account for the fact that in a certain percentage of cases there will be Requests for Evidence, denials, and USCIS errors that will require additional time. If you can use your case management software to track the frequency of such events, you can factor a percentage of this number into the cost of every service. Some programs, however, would treat such events as new cases and would charge clients a new fee. When you are calculating the cost to the agency of providing services, make sure to take account of how your program will handle such additional work.

Having ready access to data from your immigration program is essential to carrying out such calculations. Good case management software, used well, can quickly provide this information.

Knowing what it costs the agency to provide a particular service can serve as a guide to what fee to charge for that service. The fee for a naturalization application, for instance, should be higher than the fee for applying to replace a green card, since the naturalization application takes more time and thus costs the agency more to process. Your fees may not always reflect the actual cost to the agency of providing the service, but should reflect how much time the service takes.

CLINICS manual and the full fee income section is available here: <https://cliniclegal.org/resources/program-management/managing-immigration-program-steps-creating-and-increasing-legal>



BEST PRACTICES TOOLKIT

Fundraising for Non-Profit Naturalization Programs

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