



FUTURE DHARMA

Report into the 2023 DBC phone appeal

Document scope: Setting out the work involved in managing a telephone appeal for the Dublin Buddhist Centre (DBC) in October and November 2023.

Context: In October 2023 Varabandhu was “seconded” by Future Dharma (FD) to help DBC plan and manage a phone fundraising appeal. This would involve 2 hours a week for the five weeks in the run up to the telephone campaign. The week of the telephone campaign involves approximately six hours work Monday, Wednesday, Thursday and Friday and four/five hours on Saturday. Also 2 hours of post-appeal follow up to write up this report.
Approximate total hours - 42 hours.

Shorthand references used in this report:

DBC Management team:

Sadayasihi - DBC Chair - SS

Prasannadeva - DBC manager - PD

Vajrashura - DBC Finance manager - VS

FD: Varabandhu - Fundraiser - VB

Date of document: January, 2024

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1. Background

In September 2023 it had become clear to the DBC management team that a financial shortfall in the 2023 budget could not be avoided. The shortfall was mainly due to the rise of expenditure due to the cost of living crisis and amounted to approximately €20,000. Budgetary forecasts for 2024 predicted a shortfall of approximately €16,000. While short term deficits could be covered from reserves this was clearly unsustainable.

Sadayasihi sought guidance from Viryanaga who advised DBC to embark on a fundraising telephone appeal. In early October, after consultation with the other FD directors, Nandavajra gave the go-ahead for VB to work with DBC.

DBC also liaised with Birmingham BC and Maitrisara about their successful phone appeal in the summer of 2023 which raised approx £20k from a comparative Sangha base of around 150 to 200 active people. Maitrisara provided fundraising scripts and other helpful documentation.

2. Team and timeline

The appeal was scheduled for the final week in November, with a launch on Sangha Day on Sunday November 26. This timeline meant a very sharp turnaround in terms of preparation, comms etc. As the Centre is always busy with ongoing classes and groups, the appeal would be run from the men's community where there were enough rooms so that fundraisers could have privacy to make calls. **Calling would take place over three nights (Wed, Thurs and Fri, 7pm to 9pm) and Saturday morning (10.45am to 1pm) with an hour for enrichment/training before each calling session.**

Evening sessions - Meet community at 5.30 for dinner (provided), enrichment 6pm, calling 7pm
Sat am session - Meet community at 9.30 for coffee & pastries, enrichment 10pm, calling 10.45

Three training sessions of approx 2 to 3 hours each were scheduled in the weekends running up to the appeal.

VB and the DBC team identified a long list and a short list of mitras who would be potential volunteer fundraisers. VB and SS telephoned four candidates directly to personally ask them to help. All agreed though they all expressed a fear of fundraising (it was useful at this point to be able to reassure them that VB was very experienced in fundraising and would provide ample training and guidance).

VS, SS, PD collated a list of leads from the DBC database of Sangha contacts. This list was then separated into segments and ranked ([see table 1.1](#) in appendix A)

3. Identifying the Case for support

Initially we looked at analysing the cost of keeping the centre running e.g. daily cost, cost of running retreats. VB felt this was not inspiring and didn't get to the real problem i.e. that a running deficit could only really be solved by reducing support/team size.

To more clearly identify this problem VB created a survey for DBC team to complete. The survey questions (see [appendix B](#) below) were designed to

1. Clarify if the DBC believed this financial deficit was temporary or ongoing. This was key to clarifying if it was appropriate to ask the Sangha to fundraise for a one off problem now or to increase regular giving to address an ongoing problem.
2. The perceived consequences of a temporary or ongoing deficit.
3. The emotional response of the team to such consequences.

The survey [responses](#) made it clear that the DBC team truly believed the deficit is an ongoing issue that could result in a reduced ability to support the current team and were very concerned about this. This meant fundraisers could strongly speak to this clear problem and could connect the Sangha to the people affected, i.e. the DBC team.

It was agreed to be bold and ask all current donors to double their current giving and to ask non-donors to begin a regular gift of €50 per month (see [table 1.2](#))

4. Training/fundraising preparation

All four volunteers were completely inexperienced in fundraising. Three sessions of preparation for fundraisers took place in advance of the nights of calling. The first session was fully in person to give volunteers a chance to connect. The other sessions were hybrid/online to accommodate one volunteer living over three hours travel time from the community.

These preparatory sessions ([table 1.3](#)) consisted of

1. Dharma enrichment activities to provide a spiritual context for fundraising (e.g. short meditations usually led and focused around some aspect of practice e.g. resistances, metta, bigger vision, dedication ritual)
2. Fundamentals of fundraising as a spiritual practice (e.g. connecting with self, holding the tension, sense of metta for supporters, mandala of aesthetic appreciation).

The four “calling sessions” also contained an element of training/preparation, with the same mix of enrichment and drawing out of the practice of fundraising as a spiritual practice. See [table 1.4](#) for more details.

5. Communications/Marketing and launch

The aim was to build “a buzz” around Sangha in the run up to the launch of the appeal on Sangha Day (DBC president Subhadramati would be visiting and would give a talk connecting Sangha, gratitude and dana). PD recorded interviews with five members of the Sangha and these were posted on social media in the week before Sangha day and during the week of the appeal.

Sadayasihi recorded a video outlining the problem and with call to action being to answer your phone when you see the DBC calling later that week. Video was sent out by email to all Sangha leads with phone numbers on the Tuesday of the appeal.

The previous weekend Sadayasihi launched the appeal at a hybrid Sangha day, again asking people to take call.

During the nights of the appeal photos were taken of the fundraising training and of fundraisers celebrating getting standing orders and these were uploaded to social media on the night or shortly thereafter. Photos of the team with the nightly total were also uploaded to SM.

6. Systems / workflow

A low-cost solution was required to create a telethon-type setup which would allow donor pledges to be followed up and activated asap. This table sets out the workflow needs and the solutions applied.

Challenge / aim	Solution
GDPR issues for donors calling supporters from their own phones and become data holders	Used a number of old smartphone handsets which could still use WhatsApp. These were loaded with 'pay as you go' Tesco SIM cards
Callers need to track calls, responses, schedule callbacks	Spreadsheet created on Google drive with tabs for each caller. Leads were split equally and randomly between callers, with some later finessing and intentional moving of leads to better fundraisers. Calls updated online sheets. On second night call sheets were printed off and callers worked off hard copies and this worked better.
People don't answer calls - especially from numbers they don't recognise	Fundraisers calling from WhatsApp (VS set up WA on the phones so that DBC logo would come up). If no answer, fundraisers send WA message, with link to SS appeal video, flagging 2nd call attempt to come.
Whatsapp blocking fundraising phones as spammer	Callers switched from WA to regular calls and SMS. VS made appeals to WA each time and phones were unblocked and callers reverted to WA. In hindsight it's a good idea to "legitimise" new phones with texts back and forth to DBC team phones in advance of cold-calling/texting.
Processing of pledges & keeping track of funds raised	As each pledge comes in, fundraiser alerts "back-end" team (VS/PD/SS) who then pre-populate a link to a direct debit form on DBC website with donor name & pledged amount. Link is sent over to fundraising phone & then forwarded from by fundraiser to donor. Back end team log pledges to track money raised against target.
Creating sense of ritual and magic	Fundraisers made offerings of filled in pledge slips to "giving shrine" as pledges came in, rang bell to passively share success with other fundraisers in the house.
Thank new donors and donors who increased	Emails sent by supporter care/Sadayasihi

Tracking pledges against donations	Donor care person assigned to update "Post Call Donor Tracking and Care" spreadsheet. Ongoing post appeal.
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7. Post Phone Appeal actions, results and conclusions

Email sent out to everyone in Sangha thanking people for participating, asking to give if they haven't already (so appeal stays open but more passive) and inviting to a Winter Solstice celebration evening in the DBC on Friday December 16th where final results will be announced.

Final figures raised:

Increase in annual donations. (34 new monthly donors and 29 uplift): **€18,418**

With estimated tax back on charitable donations: **€24,496 (51% increase in funding on 2023)**

Life time value of new donations: **€122,480 to €244,960 (based on 5 to 10 years of giving)**

One-off donations **€5,275**

At time of writing 90% of monthly gift pledges had been set up and 75% of single gift pledges had been paid.

On Dec 16th Sadayasihi announced results at Sangha event in the Centre and thanked FDF for their support. A final thank you email sent by Sadayasihi on Dec 21st announcing results to all Sangha, with no ask. Both this email and earlier one thanked FDF for support and provided a link to FDF website.

Lessons learned:

1. Plan was to email those without phone numbers the appeal video. This was scrapped at the last minute because the call to action in the video was "our volunteers will be calling you, please take the call". In hindsight two preferable solutions would be
 - a. Record/edit alternative video version for contacts with no numbers - call to action then being to set up a direct debit now for xx amount (ideally €50pm).
 - b. Send out email without video with call to action as in (a).
2. Course bookings leads needed more refinement as it included people who were still in the middle of their first ever intro course so very unlikely to give

Possible follow up actions by DBC specifically and/or general follow ups:

- Email all leads without phone numbers and ask them to complete a form which captures their number.
- Email survey all Sangha seeking feedback on phone appeal. This is all likely to be positive so very good to generate goodwill, sense of joy and pleasure and good for comms quotes.

- Video recording why people gave - no asks, for comms, again creates positive connection, goodwill.
- Adding to the current DBC giving page to include details of costing of running the centre alongside suggested gifts i.e. “50e a month will fund the Centre for a day”.
- Put in place donor care strategy to follow up
 - pledges not paid
 - regular payments that drop off (could be cancellation or technical reasons).
 - Personally thank major donors
- Put in place ongoing fundraising strategy to ensure new Sangha members get an effective and compelling invitation to support DBC (e.g. via Mitra convenors/study groups).



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Appendix A: Tables referenced above

Table 1.1 - DBC segmentation of leads

Segment name	Size	Further breakdown	Good leads with numbers
Existing donors	90		90
Previous donors	12		12
Non donors, Mitra/OMs	114	Mitras: 31 active, 14 abroad, 51 non-active. 17 OMs (including 10 living abroad)	31
Friends	2,338	840 ranked as not worth calling 1,517 no phone number (some good leads)	28
Course bookings	93	55 - no phone numbers	39
		TOTAL GOOD LEADS WITH NUMBERS	200

Table 1.2 Analysis of existing DBC fundraising in 2023

Total dana in 2023	€48,025
The average monthly amount that people give	€48 per month (pm)
Number giving €20 to €30 pm	30
Number giving €30 to €50 pm	16
Number giving €50 to €100 pm	17
Number giving over €100 pm	11

Table 1.3 Pre-appeal programme for preparing volunteers

	Meeting 1	Meeting 2	Meeting 3
Location	In person in men's community	Hybrid - In DBC, with Subhadramati (SBD)	Online - Monday night of "calling week"
Aim / learning objective	Connect fundraisers emotionally with the problem, vision and solution.	Become comfortable with asking for money, rejection etc.	Importance of using script to keep to the arc of vision /problem/solution
Meditation activity?	5/10 mins silent sit to arrive	Gratitude Bhavana & ritual with SBD evoking Ratnasambhava	Short sit
Tune In?	3 words to describe mental state/experience right now	No	No
Fundraising Training and / or Enrichment	Fundraisers read out DBC team responses to survey and then shared their own emotional responses to same. Introduced scripts and did some role plays of script.	Role playing of scripts.	Role playing of scripts

Table 1.4 Outline of enrichment/training during appeal calling sessions

	Wed 29	Thurs 28	Fri 30	Dec 1st (AM)
Focus	Re-connect with vision & problem	Staying open to possibility & feeling the difficulty, tension	Entering mandala of appreciation, letting go of goal orientation	Sense of urgency
Enrichment	Read over DBC survey responses again and connect with why we are doing this. Dedication ritual.	Role playing difficult scenarios	Led meditation to visualise the connections made across Sangha by fundraisers.	Role play emphasising the end of appeal, sharing how well it's going with supporters

Appendix B: Survey to DBC to draw out responses to problem

- How do you feel your role with the DBC is a manifestation of your Buddhist Practice (or of your Effective Going for Refuge)?
- Can you say how does the support from the DBC help you in the above (previous question/answer)?
- The Centre has a deficit of approx €20,000 this year. What is your emotional response to this?
- In the absence of an increase in financial support from the Sangha (via fundraising or otherwise), how confident are you that the Centre will be financially stable and sustainable next year - i.e. that we will at least break even (Scale of 1 to 5 provided)
- In relation to the previous questions can you give reasons for your answer. Please try to provide reasons which are as objective as is possible
- In a hypothetical scenario where the DBC does face another deficit of €20,000 this time next year (e.g. in the absence of fundraising and no increase in income etc..) - what do you believe the consequences of this would be? (answered by multiple tick boxes):
 - A reduction in support levels for each of the members of the team
 - A reduction in the hours/time the Centre can provide support
 - A reduction in the amount the Centre can do wrt visiting teachers, retreats.
 - A re-evaluation of the Centre's finances and the need to source an outside loan
 - I believe a rolling deficit like this could adversely affect the project to fund and build a new retreat centre here
 - Everything will be fine and we will manage somehow - we've come through worse
 - Other
- In relation to your answers to the previous questions, can you say what emotional response is to the scenario outlined.
- Finally - can you say how not being on support - or on reduced support - would affect you personally (obviously we hope it never comes to this but please be forthright so our fundraisers can have a sense of what is at stake).

Appendix C: Responses from DBC to above survey

Q - How do you feel your role with the DBC is a manifestation of your Buddhist Practice (or of your Effective Going for Refuge)?

‘It is the most cutting edge aspect of my practice. Work as practice is the most transformative and challenging element of my practice”

“It’s an expression of wanting to bring the Dharma into the world. It’s a way of responding to suffering in the world, and to help people realise a path to joy, friendship, connection, and meaning”

“It enables me to live a life of service to the Three Jewels”

“For me it’s the 1000 armed Avalokiteshvara in action”

Q - Can you say how does the support from the DBC help you in your Buddhist practice through your role in the DBC?

“I can work with other Buddhists full time and not have to work other jobs to support myself”

“I simply wouldn’t be able to do the work in the same way otherwise as I’d have to go and find a job somewhere. It’d still give of my time in the evenings (work permitted) and I’d certainly give a recurring donation with the likely higher amount of money I’d be earning. But it wouldn’t be the same - there wouldn’t be a team, and I wouldn’t be able to pour my energy into it in the same way.”

“It enables me to pay the bills which means that I’m freed up to focus on my activities for the DBC”

“I would have to get another job and then I wouldn’t have the time or probably energy to do the various things I do otherwise”

Q - The Centre has a deficit of approx €20,000 this year. What is your emotional response to this?

“I desire to step up and ensure I do all I possibly can to ensure the survival of the DBC. If the centre closes, while sad, I can accept but only if I feel I have given all I reasonably can to let others know the situation and the value of what we are doing here”

“Worry, anxiety, concern...”

“Deep concern”

“Concern, sadness.”

“Immediate response: anxiety. But I'm trying not to go down that rabbit hole and embrace the opportunity that's also there.”

Q - In the absence of an increase in financial support from the Sangha (via fundraising or otherwise), how confident are you that the Centre will be financially stable and sustainable next year - i.e. that we will at least break even - please give reasons.

“Even with a successful fundraise we need to adapt as a centre in order to survive”

“Well, it's hard to see how things will break even, given how the course income has been down quite a bit for the last while, especially with the strain of having to repay loans on Shubha Vihara”

“There are too many variables - some beyond our control causing this financial crisis.. The increase in income needed to effect the deficit is too large to realistically reduce the deficit in the short term.”

“Expenditure is increasing e.g. bills etc”

“I'm not an optimist. It will be hard work to break even. There's no magic bullet - it's a complex set of conditions we are operating in - post-covid, localism, safety concerns, cost of living crisis...I think asking the sangha to support us more is our best hope. Not that I think this will solve our deficit for this year but a greater sense of ownership would be good - and even an awareness of how the team operates would be no bad thing as I imagine most people aren't really aware that we work on support or what that even means”

Q - In a hypothetical scenario where the DBC does face another deficit of €20,000 this time next year (e.g. in the absence of fundraising and no increase in income etc..) - what do you believe the consequences of this would be?

A reduction in support levels for each of the members of the team

A reduction in the hours/time the Centre can provide support

A reduction in the amount the Centre can do with respect to visiting teachers, retreats

I believe a rolling deficit like this could adversely affect the project to fund and build a new retreat centre here

Q: What is your emotional response to such scenarios?

“Sadness, a sense of loss, a missed opportunity...”

“Sadness that it might come to this when people have put so much energy into their roles on the team”

“Sadness”

“Anxiety. This has definitely made me feel anxious thinking about it”

Q: Finally, can you say how not being on support - or on reduced support - would affect you personally?

“It would mean not being able to support myself in the job and having to find other options. I love month by month often going into the minus as is, I cannot survive on less while living in Dublin”

“It would really affect how I can give to the DBC - I would be able to give much less. Being locked into a regular job (that I'd need to get) would stop me being able to go away on DBC retreats which I lead, or doing projects for Triratna and the DBC that need extra time away”

“I won't be able to get on retreat and this is so important for anyone giving the gift of the Dharma to feed ones inspiration”

“I would have to review what I do at the centre and may no longer be able to commit to all I currently do”

“Well, depends on how reduced it would be. And for how long. Long-term it wouldn't be sustainable to work for the DBC as it's a demanding role and I couldn't take responsibility if I don't know if I can pay my rent”



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