



# Healthy for Life<sup>®</sup>

## Educational Experiences



# Funding Toolkit

This Healthy for Life<sup>®</sup> Funding Toolkit was created by Aramark and the American Heart Association as part of our Healthy for Life<sup>®</sup> 20 by 20 Initiative. We are proud to be working together to help improve the health of all Americans.

Healthy for Life<sup>®</sup> is a registered trademark of Aramark



## INTRODUCTION

Healthy for Life® 20 By 20 is a community-based nutrition and well-being program created by Aramark and the American Heart Association to empower people to make healthy food and lifestyle choices. Together, we encourage people to change food and health attitudes and behaviors – equipping them with new skills and habits for healthy living.

The program incorporates interactive components such as demonstrations on healthy cooking, shopping skills, proper nutrition and heart health. Since inception, churches, community centers, schools and health centers nationwide have used the program, resulting in increased:

- Fruit and vegetable consumption
- Frequency of choosing whole grains
- Confidence in ability to improve their health
- Confidence in ability to prepare healthy meals at home

Healthy for Life® improves key health behaviors through various delivery methods and frequency. In particular, the program suggests a minimum of four educational experiences over 2-3 months to ensure behavior change.



## PURPOSE OF THE TOOLKIT

While the expenses to execute the program are minimal, any costs can deter implementation for some community centers or organizations. The Healthy for Life® Funding Toolkit provides the knowledge to **secure funding** to deliver four educational experiences over 2-3 months from funders and local partners (e.g., grocery store, gym, restaurant, etc.). The optimal amount to execute the experiences is \$2,500.



# Fundraising 101



## IDENTIFYING FUNDERS

To get started, identify the businesses you'd like to approach to ask for donations.

**Grocery stores (chain and local)** – Grocery stores are a logical option to promote the program and branding. Chain stores often have budgets for community relations (gift cards, product, etc.), and local stores often like to get their name out in the market to potential customers.

**Chain retailers** – Like chain grocery stores, other “big box” national/regional chain retailers sell food and kitchen utensils. A department store that sells homewares could also be a good prospect.

**Gyms, fitness centers, fitness retailers** – An important part of Healthy for Life® is physical activity. Gyms and exercise equipment/clothing retailers may respond to the opportunity to market to new members/customers. Many of these stores are franchises, so local managers may have more control of philanthropic budgets.

**Volunteer connections** – Think about volunteers you already partner with and where they work or who they know. Fundraising is all about relationships, so the person asking is key.





## Tips

**When talking to potential donors, keep the following tips in mind. These tips can play a major role in securing funds and help the conversation!**

### Name Drop

If a volunteer or someone you know has suggested a business because of a relationship that volunteer has, always start your message with that person's name. Example: "Hi, <store manager>. Joe Smith (your mutual connection) suggested I call you because..." Fundraising is all about relationships, and those first few seconds are key. If the funder hears a name they recognize, they're more likely to listen to what you have to say.

### Credibility is Key

Businesses get asked for donations every day, and they want to know that their contribution is going where you say it is. A business card or a request on your community center's official letterhead can give your request legitimacy. If you're walking in to ask in person, wear a shirt with your community center or organization's logo.

### Be Specific

Funders need to know an amount range or idea of what you need. If you ask for generic support, they might just give you a bag of apples and send you on your way. If you ask for a \$2,500 gift card, the manager has a better understanding of the scope of the project and how their commitment can help.

Please visit [heart.org/HealthyForLife](https://heart.org/HealthyForLife) to access other helpful resources.



## Gatekeeper Tips for Success

As you reach out to connect, you may find that you run into a gatekeeper, or someone who “holds the key” to you connecting with a decision maker. Review these Gatekeeper Tips for Success to learn how to best work with this role.

### Recognize their Value

- Respect their time and be aware of how long you spend with them. They have other callers or visitors as well. Ask a few open ended questions while you have their attention. This helps recognize their position of authority and make them feel appreciated and respected.

### Be Polite and Respectful

- Remember the *Platinum Rule* – treat people how *THEY* want to be treated.
- Demonstrate recognition that they are in charge.
- Ensure your focus is on them if you have to wait in the lobby prior to a meeting.
- Be present and not on your cell phone.
- Use their name when speaking to them, make eye contact, take notice of their surroundings: awards, family photos, college memorabilia and build rapport.

### Give Important Details

- If you’ve reached them by phone: State the reason for your call and briefly explain why you think the decision maker would be interested.
- If you’ve dropped by in person: Focus on meeting the gatekeeper THEN focus on meeting the decision maker you came to see, and why it would be to their benefit. Avoid walking in and asking for the decision maker immediately without engaging the gatekeeper or providing details about why you are there.

### Cultivate

- Drop by, introduce yourself to the gatekeeper with a business card/leave behind information, and explain your purpose.
- If you can’t see the decision maker at that time, ask to make an appointment. Send their boss a thank you note citing how polite and helpful they are.
- Send them a thank you note for helping you.

### Be Honest

- Make sure to be honest with the gatekeeper if you do or do not have an existing relationship with the decision maker.



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# The Ask

Now that you've compiled your list of businesses to reach out to, and have some tips to help your ask, draft a succinct "pitch." Your contacts will want to know what the program is, its impact and what's in it for them. Craft your message based on whether you're asking over the phone, in person or via voice mail.

## PHONE

If you're cold calling a business, you won't have much time to state your case. Ask to speak to the manager, because he or she will most likely oversee their donation budget. If you have time, research that person's name and ask for him or her specifically. Many grocery stores list their managers' names on their website.

Name drop here if applicable.

Once he or she answers, frame your request like this:



*Hi, < manager name >. My name is < \_\_\_ >, and I'm calling to ask you to support a local program that < your community center/organization name > is implementing.*



*It's called Healthy for Life®, and we work right here in < your city > to inspire people and families to make healthy food choices part of their everyday lives.*



*Research shows almost half of our participants increased their confidence to prepare meals at home and keep their pantry well-stocked.*



*We thought < business name > would be a perfect fit for this program. Will you consider donating < specific ask > to help our cause?*

Your maximum ask should be **no more than \$2,500** to sufficiently fund four Healthy for Life® classes.

After the initial ask, be prepared to provide additional information about the program, as you have a great opportunity to explain how their business can benefit and impact the community. Be prepared with specific suggestions, but be open to other recommendations because each business will likely see value and partnership as unique to their needs and resources.





## VOICEMAIL

Most likely, you'll get the manager's voicemail when you call the store. The message will sound similar to the phone call, but with a few tweaks to hook them to call you back.

For example, research shows that sharing your name towards the end of the voicemail increases the likelihood of the manager to listen to the voicemail all the way through.

Name drop here if applicable.

Additionally, a specific ask isn't suggested with this approach.



*Hi, < manager name >. I'm calling to ask you to support a local program that < your community center/organization name > is implementing.*



*It's called Healthy for Life®, and we work right here in < your city > to inspire people and families to make healthy food choices part of their everyday lives.*



*My name is < \_\_\_ >, and we'd like to count on < business name > to support our participants and the community.*



*Will you please call me back at < xxx-xxx-xxxx > to discuss an opportunity to partner with us?*

## IN-PERSON

Stopping by a business can be a great way to create an immediate rapport with a manager because your presence can reinforce your authenticity. But beware that many managers deal with angry customers and might be on guard when you approach them.

Since you'll have a conversation, you don't have to squeeze as much into your first few words. Name drop here if applicable.



*Hi, < manager name >. My name is < \_\_\_ >, and I'm the < title > at < your community center/organization name >.*



*We're implementing a program called Healthy for Life® that inspires people and families to make healthy food choices part of their everyday lives.*



*Research show almost half of the participants increased their confidence to prepare meals at home and keep their pantry well-stocked.*



*We'd like to promote < business name > as a supporter of the program. Will you consider donating < specific ask > to help?*



## EMAIL

Individuals are constantly checking their email. With the ability to check and reply to emails anywhere, anytime, it may be more comfortable for people to interact via email. Name drop here if applicable.



*Hi < manager name >.*



*I'm reaching out to you about a program called **Healthy for Life®** that inspires people and families to make healthy food choices part of their everyday lives.*



*As the < title > at < your community center/organization name >, we'd like to promote < business name > as a supporter of the program. Will you consider donating < specific ask > to help?*



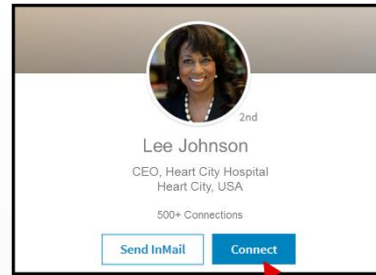


## Social Media

You can also use LinkedIn or your preferred social media outlet to make the ask!

Use the format from the email example and put that into the message box for LinkedIn, or your chosen social media preference.

Broaden your reach by utilizing your social media channels!



Click here

Type message

You can customize this invitation

Include a personal message (optional):

Greetings Ms. Johnson,

Your name came across my LinkedIn page and I see you too are connected with Anne Smith. With our mutual connection in mind, I thought we might also connect here on LinkedIn.

Have a great week,  
Sally Swansong

Cancel Send invitation



Connect with potential donors on [LinkedIn](#).

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Share fundraising goals on [Facebook](#).

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Advertise your program on [Twitter](#) and create your own hashtags.

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## You've Made the Initial Ask... Now What?

Once you've made the initial ask, a dialogue is likely to proceed and you'll have to be prepared on the fly to flow where the conversation takes you. Use these tips to produce additional details, answer questions, and overcome objections.

## Demographics and Outcomes

As a facilitator, you can talk about details of the program and how it has helped community members. To ensure the donor is supporting a successful program that reaches its target audience, they might want more information about the overall participants and outcomes.

### Demographics

Here is some data from a national sample of Healthy for Life® participants that may compel a business to support your program.

- African-American (74 percent), Hispanic (18 percent), white (7 percent)
- Female (79 percent)
- ≥One child under 18 years at home (34 percent)
- Completed high school or more (80 percent)
- Receive SNAP (food stamp) benefits (19.2 percent)
- Fifty percent of participants are the only person making meal preparation decisions or share responsibility in the home.

### Know Your 501c(3) Number

To contribute dollars or in-kind gifts, many businesses need your 501c(3) number for tax purposes.

### Results

- Forty-three percent have increased their confidence in improving their health.
- More than one-third now substitute healthier cooking and preparation methods and make food more flavorful with herbs or seasonings instead of salt.
- More than half now seek lower-sodium options when they eat out.
- Forty-seven percent of participants lowered their weekly consumption of sugar-sweetened beverages by one or more cans.





## What's in It for Me?

Businesses get approached from many groups for contributions and donations, so it is helpful to make a case of how supporting your program can benefit their business.

### **Their business will be promoted to all program participants.**

If they donate money, you can recognize them with signage at the community center or organization, table tents in the program room, etc. See signage template on pg. 15 as an example. If they donate in-kind, their store label may be visible on the products they donate, or you can verbally recognize them at the beginning of the class. Some stores have branded giveaways such as coolers, tote bags, etc.; these could be used as incentives to encourage participants' attendance. Here is sample statement to use "We would like to thank [company name] for their support of Healthy for Life® Educational Experiences at [organization's name]. We're very appreciative of their support!"

### **Their business will be promoted to all community center members.**

If they donate a sizeable amount, consider writing a story for your newsletter or bulletin board in the community center or organization, or sharing via social media or blog posts.

### **Allow the local store to promote the program.**

The business may want to promote their involvement, so consider using testimonials from Healthy for Life participants that the manager could post with a display about Healthy for Life.





## Follow-Up

Don't be discouraged if you don't get a call back or you feel like you're getting the runaround. Persistence is key. If you commit to following up, do it – it sounds simple, but so many people don't do what they say they will. If the business commits to following up and doesn't, check back in.

On average, it takes 5-8 contacts before you receive a contribution. Don't be a pest if they outright decline, but don't be scared to reach out multiple times until the manager is available to talk to you. Be sure to vary your communication style. If they aren't calling you back, try an email. If you can't get them on the phone, try connecting and messaging on LinkedIn.

## Post Meeting Follow-Up

When you are able to connect with a potential funder, make sure to follow-up:

- Within 24 Hours: Email recap with next steps
- Within 48 Hours: Handwritten thank you note mailed

## Keep In Mind

**Best times to follow-up:**

- Calls: 3 pm and later
- Emails: 5 minutes before and after the hour
- Days of Week: Thursday and Friday

**Key Tips:**

- Timely
- Vary forms of communication
- Be persistent not pesky: add value to decision-making process
- End interactions with clearly defined next steps
- Summarize conversations and get written confirmation



Please visit [heart.org/HealthyForLife](https://heart.org/HealthyForLife) to access other helpful resources.

## Stewardship

A handwritten note or personal thank-you email can go a long way to building a relationship and setting you apart from other groups asking them for donations. Even if they don't contribute immediately, they may in the future. So nurture the relationship and always thank them, even if they say no.

## Get Creative

Hand written notes, phone calls and thank you emails sent within 48 hours of a commitment are a best practice. Additionally, there are opportunities to get creative when stewarding your partners to really make an impact. Check out these memorable stewardship Ideas:

"What you eat can determine how long you live. Thank you for supporting our efforts to promote the power of healthy eating in our community." (drop off with a heart healthy recipe or piece of fruit-apple, banana, or orange).





## Stewardship Conversations

At the close of your program, it's a great idea to set up some time to debrief with your partner. Getting feedback and having an intentional stewardship conversation can set you up for success if at a later date you would like to work with that partner again. Integrate some of the below questions into your debrief:

- What inspired you to partner with me/us?
- How does our organization compare to other organizations you choose to support?
- What do you like that we are doing?
- How could we improve?
- How do you measure success when partnering with an organization?
- How would you grade your experience with us on a scale of A to F?
- Are you likely to partner with us again? Why or why not?
- How do you like to be thanked/recognized?







# We would like to thank

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for their support of  
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We're very appreciative of their support!

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