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# INSPIRATIONAL FUNDRAISING: IGNITING ACTION

OCTOBER 29, 2019



# SPEAKER INTRODUCTIONS & BIOS



WE'LL BE *better together* AT  
NONPROFIT DAY WITH HELP FROM:

*Jeff Bagel, Ted Wood,  
& Jonathan Rilling*

NONPROFITDAY2019.ORG



*HOW MANY YEARS IN FUNDRAISING  
AND WHAT IS YOUR EXPECTATION AS  
A TAKE AWAY FROM TODAY?*





*WHAT, WHO, WHY INSPIRES YOU TO  
BE A FUNDRAISER?*



# INSPIRATIONAL ASSUMPTIONS

- Ted Wood
- President
- Ted Wood & Associates



# THE CURSE OF THE ETYMOLOGIST

- From the Latin: *inspirare*
- Life & movement
- The question: how to ... inspire ... put-life-into ... start breathing ... get the wind to your back ... in donors, leaders, staff and yourself?

# ASSUMPTIONS EXAMINED

- What inspirational fundraising is not!
  - It's not abracadabra
  - It doesn't begin with action
  - It's not primarily about fundraising
  - It's not primarily about ... programs ... clients ... buildings
  - It's not primarily about doing good or feeling good

# INSPIRATIONAL FUNDRAISING BEGINS WITH TURNING

- It's about changed priorities...what's really important ... a personal conversion
- “Conversion” from the Latin, *convertere*
- That conversion begins with hard questions ... about assumptions and motivations



# HOW DO YOU INSPIRE YOURSELF?

- We leak
- Rehearse the realities:
  - Right timeframe?
  - What's true?
- A lot of grace and serendipity
- The good you've received is for ...?

# HOW TO INSPIRE/BRING LIFE TO OTHERS?

- A beguiling attractiveness
- Competency & Confidence
- Truthfulness
- Joy & Delight
- Transparent & Authentic
- You've paid your dues, but ...
- Communicate the "Big Picture": Aspiration (*aspiratio*) & Possibility

# NOTHING IS *EX NIHILO*

- Looking for warm ... not cold
- *Chairos* not *Kronos*
- Practically speaking ...
  - Clarity
  - Urgency
  - Mirroring others' aspirations
  - Increased risk tolerance
  - Hand-holding

# ARE YOU INSPIRATIONAL OR PROFESSIONAL?

- Going deeper than “professional”
- ... A good thing or an Adventure?

# FUNDRAISING WORK & LIFE BALANCE

- Jonathan Rilling
- VP of Marketing, Advancement, and Communications, Erie Homes for Children and Adults



# “WHO HERE KNOWS THAT EVERYONE KNOWS HOW TO DO OUR JOBS?”

- Everybody you work with thinks that they know how to raise money, take lead on events, raise community awareness, etc.



## BALANCE BETWEEN WORK & LIFE

- It's been reported that nearly 50% of nonprofit fundraisers would like to quit their current role.

# BALANCE BETWEEN WORK & LIFE

- We are known for being some of the busiest folks out there.
- You have to be truly passionate about your cause to help counteract the stress of fundraising.
- Passion won't prevent you from feeling overwhelmed.
- Work toward achieving a healthy balance between work and life.

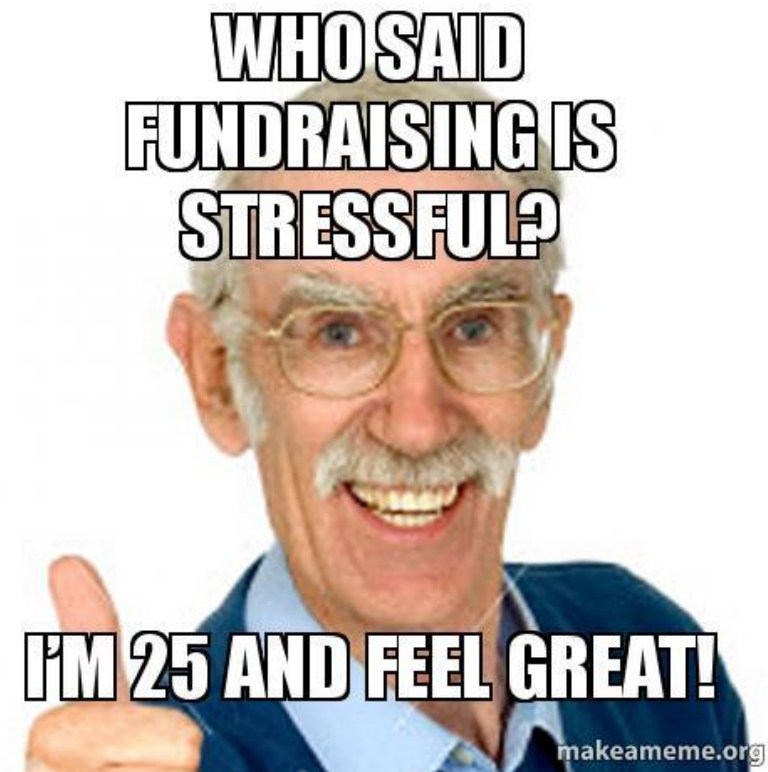




# BALANCE BETWEEN WORK & LIFE

So...what makes a SUCCESSFUL Fundraiser?

- Impeccable integrity
- Good listener
- Ability to motivate
- Hard worker
- Concern for people
- High expectations
- Love the work
- High energy
- Perseverance
- Presence



# BALANCE BETWEEN WORK & LIFE

- *"I'm gonna say it..."* WE CAN'T DO IT ALL!
- The Martyr Complex in the nonprofit community.
  - *Present when a person routinely emphasizes, exaggerates, and creates a negative experience in order to place blame, guilt, and sorrow on another person.*

The person who  
tries to keep  
everyone happy  
often ends up  
feeling  
the loneliest.  
curiano.com

we  
~~don't~~  
**can't**  
~~have to~~  
do it  
all

# BALANCE BETWEEN WORK & LIFE

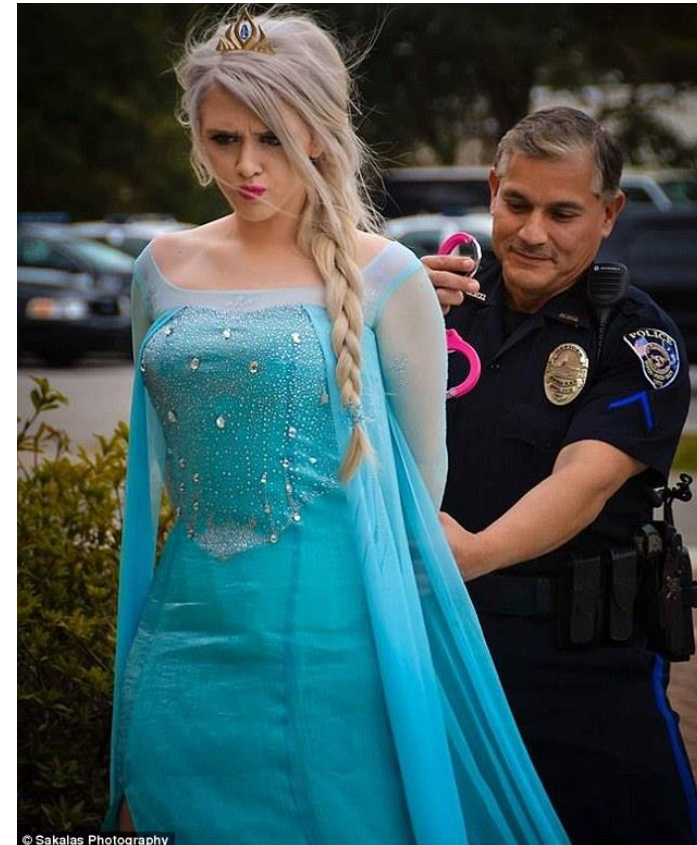
- The work we do directly makes the world a better place!
- We take all of that on our shoulders.
- We have to preserve ourselves.

This stress you've  
placed on your  
shoulders is going to  
crush you.  
Give yourself a break.  
You don't need to be  
perfect. You don't need  
to have it all together all  
the time. You don't need  
to please everyone.

*Don't  
Worry  
About  
It*

# BALANCE BETWEEN WORK & LIFE

- Compassion fatigue
  - *The physical and mental exhaustion and emotional withdrawal experienced by those who care for sick or traumatized people over an extended period of time.*
  - *Apathy or indifference toward the suffering of others as the result of overexposure to tragic news stories and images and the subsequent appeals for*



# BALANCE BETWEEN WORK & LIFE

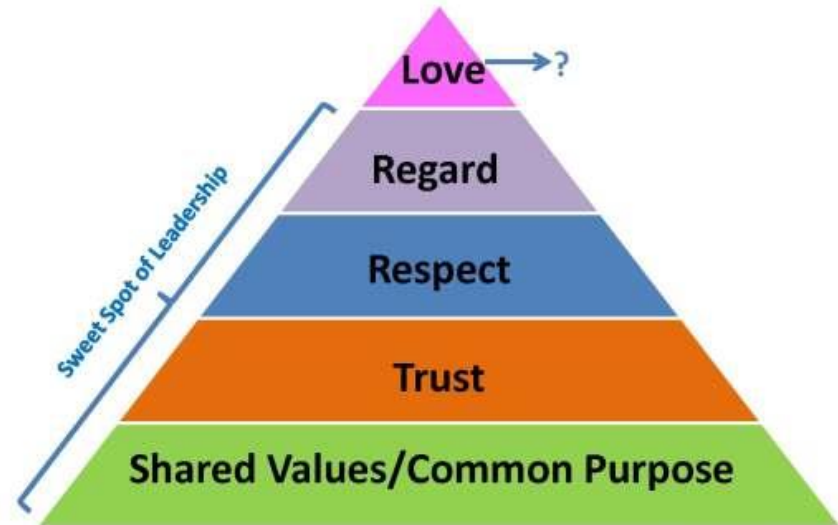
- For those of us in this profession, we realize that the line between our work and personal lives can be easily blurred.
- In many cases, our work is our life's mission.
- Think of yourself as a market niche. There will be many people that like that niche, but there will be individuals who do not, and no matter what you do, you will not be able to make an entire market like you. This is entirely natural, and there's no need to do anything to justify yourself.
- The only thing you can do is continue being authentic, and know that a growing number of "haters" means that you are doing important things

You will never be criticized by someone who is doing more than you. You will only be criticized by someone doing less.

Read that again.

# BALANCE BETWEEN WORK AND LIFE

- We as individuals are walking PR campaigns, *however good or bad that may be.*
- Good PR causes people to like you.
- We all do business and build relationships with people we like.
- Likeability powers everything from whom we believe to what we buy.





# TIPS YOU CAN PUT INTO PLAY TOMORROW



# BALANCE BETWEEN WORK & LIFE

## Structure Your Day

- Stress can be derived from not having any structure.
- Stress can be derived from distractions.
- Stress can be derived from taking on tasks outside the scope of your work.
- Focus on what you were hired for - cultivating and stewarding donors.





# BALANCE BETWEEN WORK & LIFE

## Create boundaries

- I know you have other responsibilities other than donor cultivation and donor stewarding.
- If you are faced with additional responsibilities, you can't cultivate 200 donors.
- Bearer of bad news – ***YOU CAN'T DO THIS!***
- Think about this... If you can only commit 25% of your time to donor cultivation, I would say that you can only cultivate 30-35 donors. *And of that group, you are going to spend the majority of your time with 5 of them.*



# BALANCE BETWEEN WORK & LIFE



## DOB Effect

We're aren't necessarily efficient or effective,  
we settle for just

**Doing  
Our  
Best**

# BALANCE BETWEEN WORK & LIFE

## Live gratefully

- Take time every day to focus on being grateful for the work you get to do and the life you have.
- When we're stressed out, we lose perspective.
- Busiest time(s) of the year.



# BALANCE BETWEEN WORK & LIFE

## Retrospective

- Assess you and your department's efforts/data from the previous year.
- List the things that worked and did not.
- If certain things were a hindrance to you, your team, your agency, TOSS THEM!!!
- Your "to do list" will most likely still be packed with priorities, but knowing that what you are doing is leading you, your team, and your mission in the right direction will keep everyone



# BALANCE BETWEEN WORK & LIFE

- Learn to say “no” & delegate
  - This goes for the office and at home.
  - Establish boundaries and make it clear to colleagues, family, and friends that you can’t and shouldn’t be expected to do everything.
- Learning when to say “no”
  - Doesn’t diminish your character
  - Won’t cause your organization to collapse
  - Minimizes distractions



# BALANCE BETWEEN WORK & LIFE

- Your relationship and communication with leadership
  - Agreeing on a development plan (nobody likes to write the plan down...)
  - Prioritizing development at your shop
  - Investing in “overhead”
  - Where is YOUR TIME best invested?





# BALANCE BETWEEN WORK & LIFE

- Liking what *YOU* do (uplifting / making a difference)
- Looking for or appreciating the best fit (money isn't everything)
- The grass is always greener
- Development personnel and our community





*BREAK TIME*





# WHY YOU NEED A PLAN

- Jeff Bagel, Principal,  
eAdvancement Consulting



# UNDERSTANDING THE NEED FOR A FUNDRAISING PLAN

Mission driven

Ties into  
strategic plan

Goal oriented &  
metrics focused

Clearly defines  
roles and  
responsibilities

Sets expectations

Provides a board  
management tool

Strong institutional  
knowledge

Effective for time  
management &  
prioritization

Relationship  
builder for internal  
& external  
stakeholders

Proper execution  
& follow up

Creates a culture  
of giving

# TODAY'S TAKEAWAY

**ANNUAL FUNDRAISING PLAN TEMPLATE**

To be completed by supervisor and staff members who are responsible for action items.  
Board input and college leadership input is also appropriate.

2020/21 Budgeted Goal: _____	2020/21 Budget: _____
Number of Donors: _____	2020/21 Actual: _____
	Number of Donors: _____

**Synopsis:** \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Challenges:**  
•  
•  
•

**Strengths:**  
•  
•  
•

**Outcomes:**  
•  
•  
•

**Tactics:**  
•  
•  
•

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- Easy to use templates that you can use to create your own fundraising plans.

# TEMPLATES

- To be used by supervisor and staff members responsible for action items.
- Board input and leadership input is also appropriate.

# UNDERSTANDING THE NEED FOR A FUNDRAISING PLAN

Mission  
driven

- Opportunity to explain mission to key stakeholders
- Opportunity to get and keep stakeholders focused on results

# UNDERSTANDING THE NEED FOR A FUNDRAISING PLAN

Ties into  
strategic  
plan

- Important for accreditations
- Makes a strategic plan “real”; gets it off the shelf
- Use strategic plan in fundraising plan
- Can provide components to create or enhance strategic plan

# UNDERSTANDING THE NEED FOR A FUNDRAISING PLAN

Goal oriented  
& metrics  
focused

- Provides opportunity to rate quality of staff's work
- Provides opportunity for your work to be appraised by president and board of directors
- Becomes real

# UNDERSTANDING THE NEED FOR A FUNDRAISING PLAN

Clearly defines  
roles and  
responsibilities

- Cross-training
- Ability to manage staff and volunteers



# UNDERSTANDING THE NEED FOR A FUNDRAISING PLAN

Sets  
expectations

- It becomes real
- Strive for same goals
- Work smarter instead of just hard

# UNDERSTANDING THE NEED FOR A FUNDRAISING PLAN

Provides  
a board  
management  
tool

- Shows competence and vision
- Makes life easier
- Key for recruiting

# UNDERSTANDING THE NEED FOR A FUNDRAISING PLAN

Strong  
institutional  
knowledge

- Increases staff interaction
- Share and increase knowledge base
- Educate key stakeholders

# UNDERSTANDING THE NEED FOR A FUNDRAISING PLAN

Effective  
for time  
management  
& prioritization

- Makes it easier to take on new projects
- Effective management tool for staff
- Increases supervisor-employee communication

# UNDERSTANDING THE NEED FOR A FUNDRAISING PLAN

Relationship  
builder for  
internal &  
external  
stakeholders

- Sets example for other leadership to follow
- Great for accreditation reviews
- Creates a culture of giving

# UNDERSTANDING THE NEED FOR A FUNDRAISING PLAN

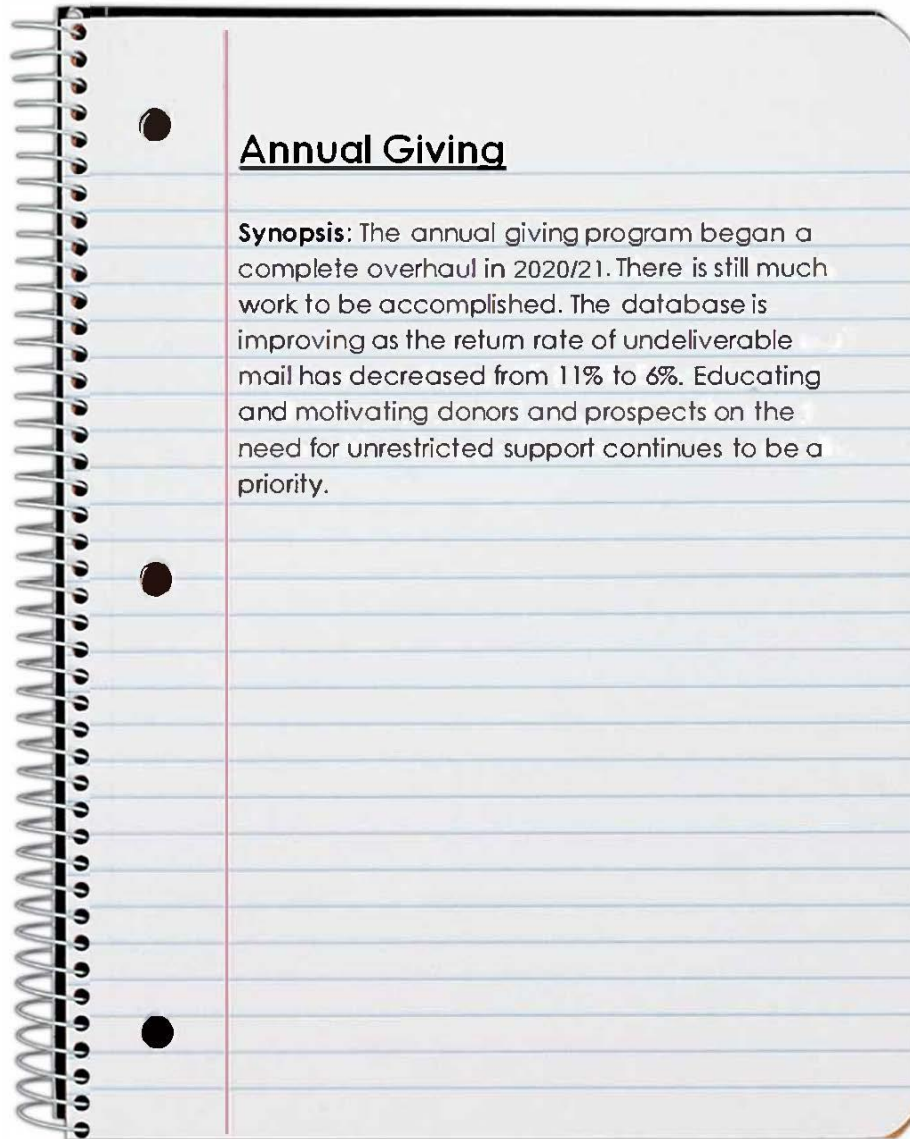
Proper  
execution  
& follow up

- Outcome-based
- Provides framework for success
- Sets expectations

# UNDERSTANDING THE NEED FOR A FUNDRAISING PLAN

Creates a  
culture  
of giving

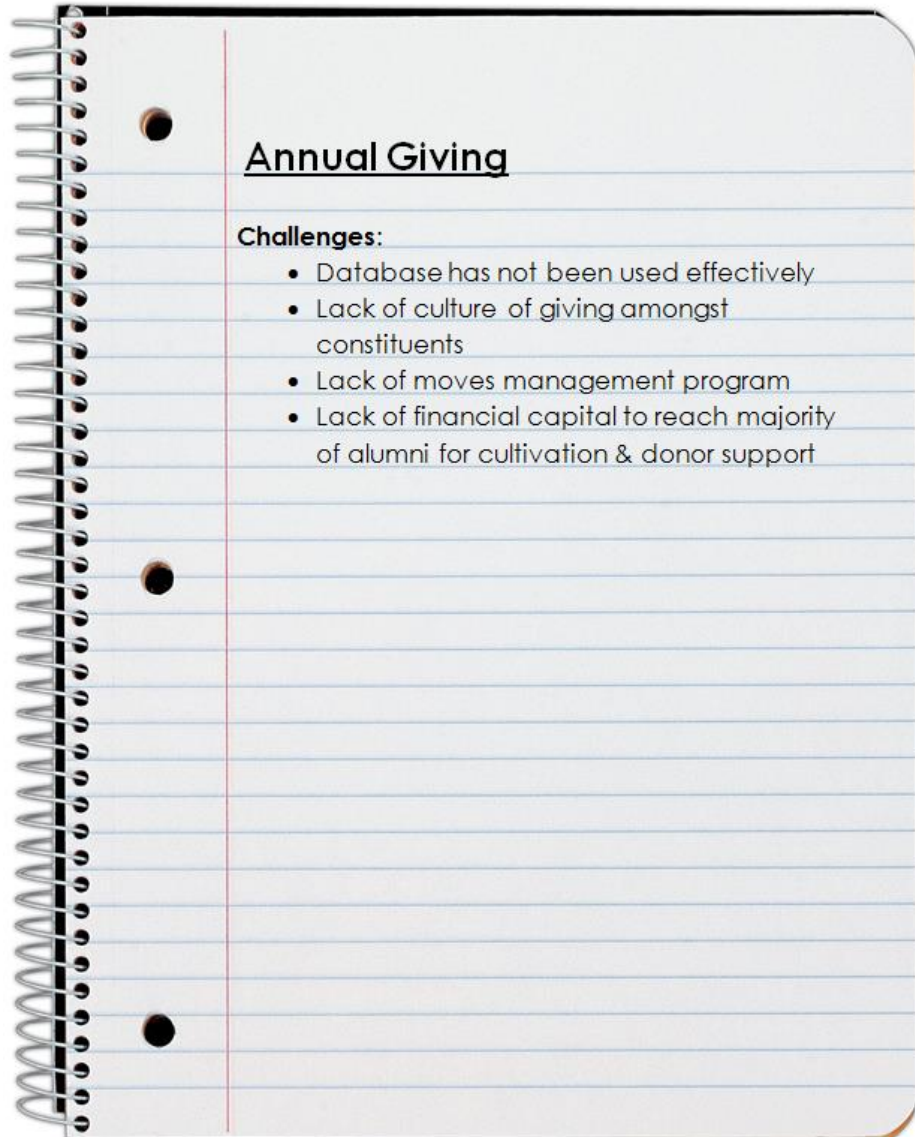
- Helps maximize fundraising efforts



## Annual Giving Plan Synopsis Section

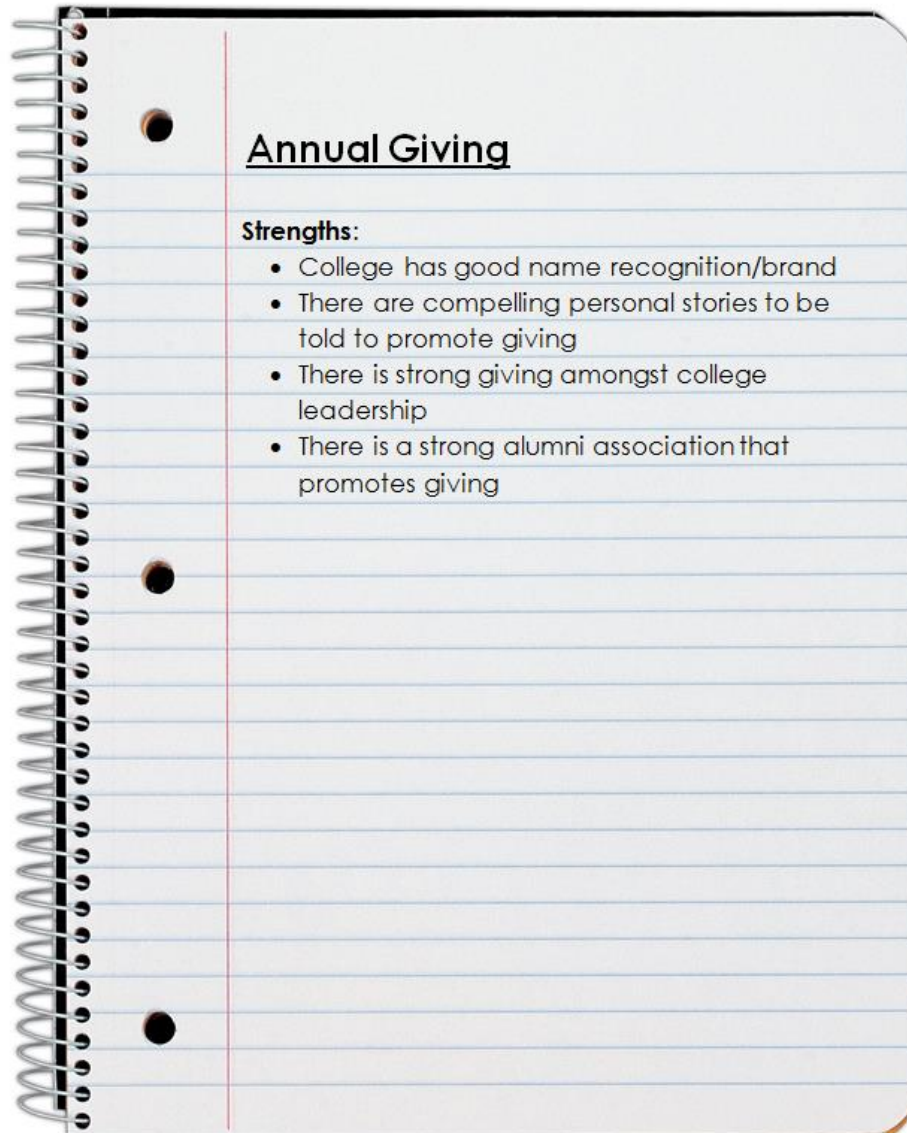
- Your overall assessment
- Maximum one paragraph





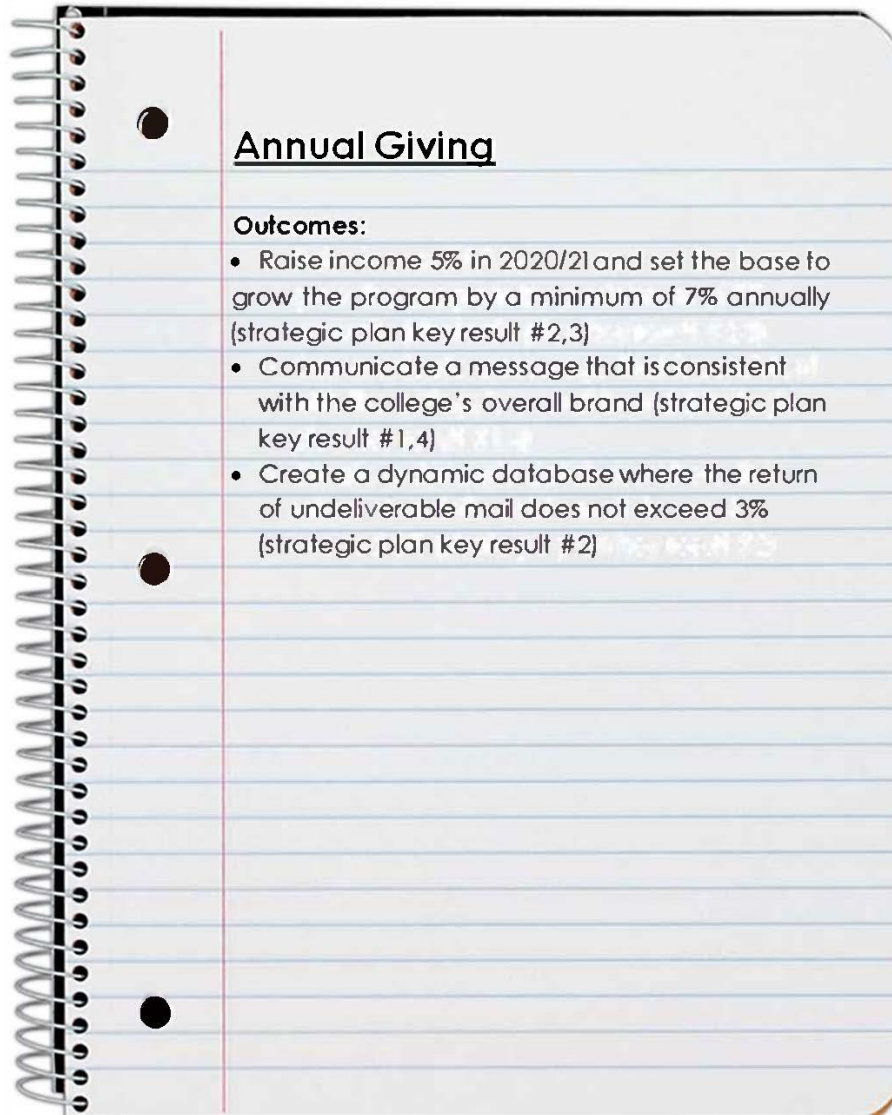
## Annual Giving Plan Challenges Section

- List in bullet points
- You are listing potential obstacles or stumbling blocks
- Always be positive. Never use the word “problem”



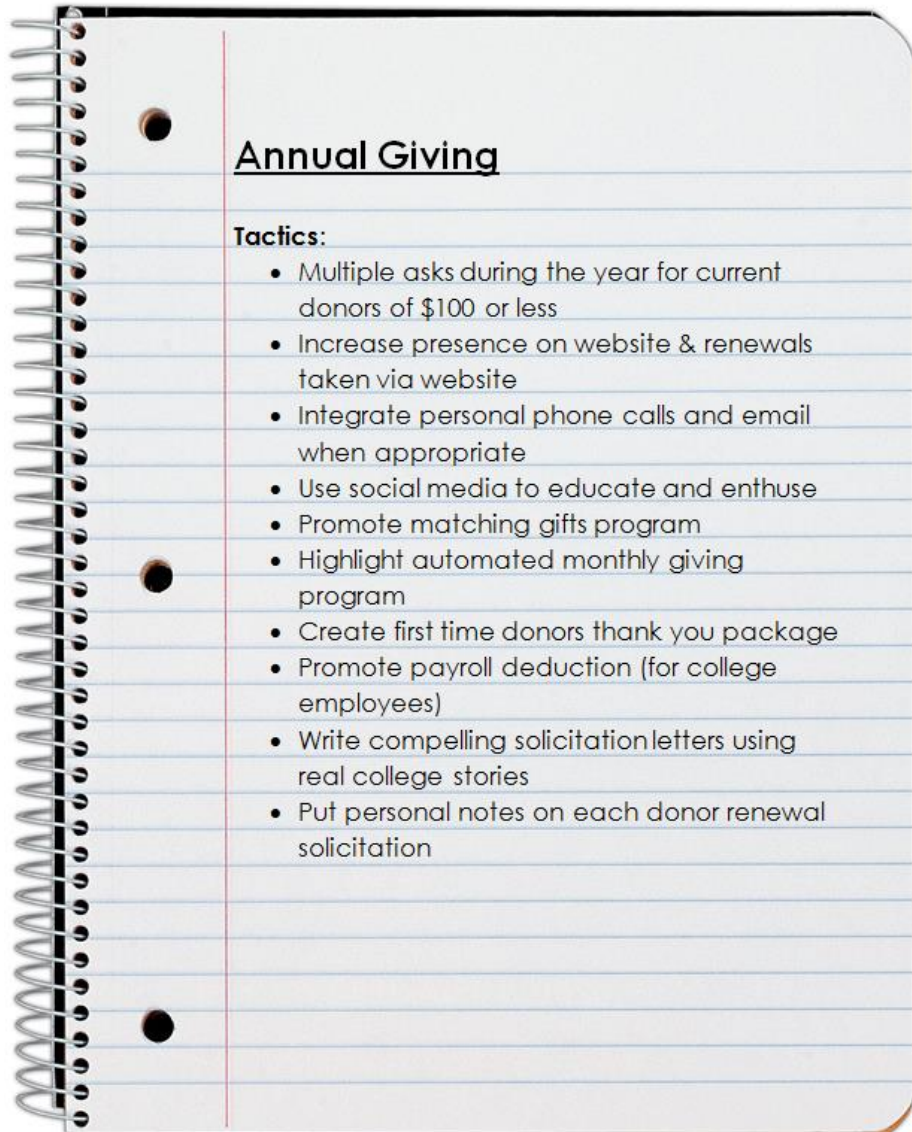
## Annual Giving Plan Strengths Section

- List in bullet points
- The power of the program/event to build on.



## Annual Giving Plan Outcomes Section

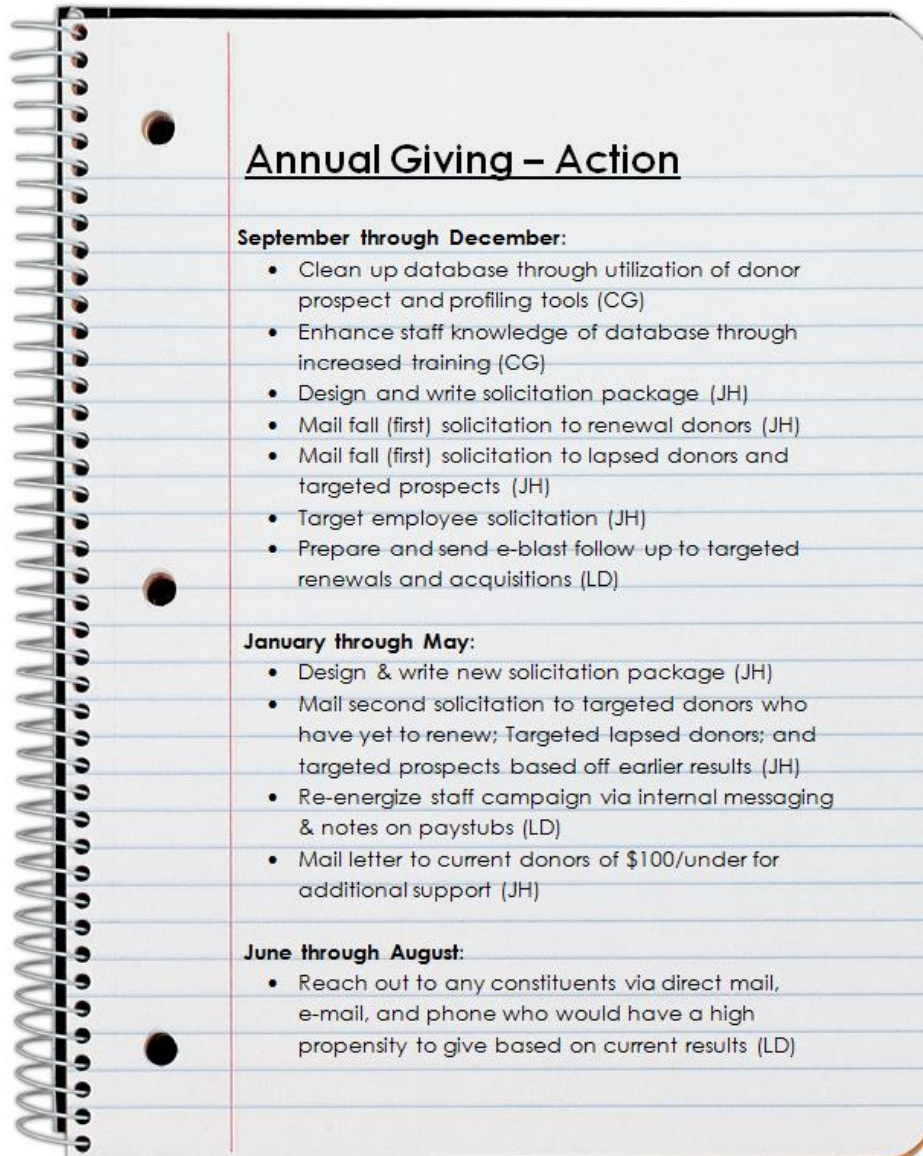
- List in bullet points
- What you plan to achieve
- Each program/event should have 2-5 outcomes
- Be specific
- Tie into strategic plan outcomes



## Annual Giving Plan Tactics Section

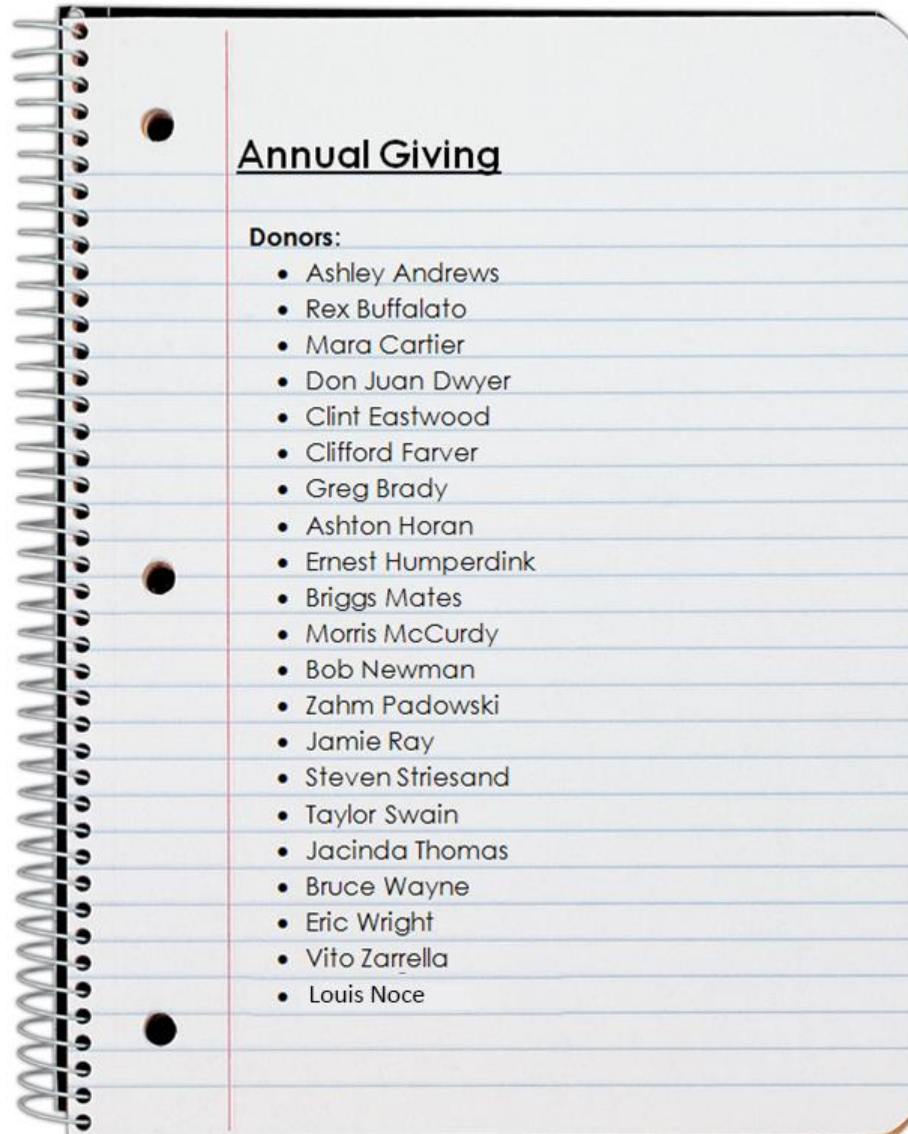
- List in bullet points
- How you are going to achieve your outcomes
- Be specific





## Annual Giving Plan Action Section

- Divide either monthly or quarterly
- Be specific with who is responsible to complete action item



## Annual Giving Plan Donors Section

- List your top 20-50 annual donors
- Keep close
- Top of mind awareness

Here is what  
an Annual  
Fundraising  
Plan  
might look  
like when  
completed:

### ANNUAL FUNDRAISING PLAN EXAMPLE

To be completed by supervisor and staff members who are responsible for action items.  
Board input and college leadership input is also appropriate.

2020/21 Budgeted Goal: <u>\$50,000</u>	2019/20 Budget: <u>\$45,000</u>
Number of Donors: <u>1,500</u>	2019/20 Actual: <u>\$47,250</u>
	2019/20 Number of Donors: <u>1,455</u>

**Synopsis:** The Annual Giving program began a complete overhaul in 2015/16. There is still much work to be accomplished. The data base is an ongoing challenge, as is educating and motivating prospects on the need for unrestricted support.

#### **Challenges:**

- DonorPerfect data base has not been used effectively
- Incomplete/outdated addresses and e-mails persist
- Improper and incomplete coding in data base persist

#### **Strengths:**

- College has good name recognition/brand
- There are compelling personal stories to be told to promote giving
- The return of undeliverable mail continues to trend downward

#### **Outcomes:**

- Raise income in 2018 and set the base to grow the program by a minimum of 5 percent annually in future years (strategic plan key result #2,3)
- Communicate a message that is consistent with ECC's overall brand (strategic plan key result #1)
- Create a dynamic data base (strategic plan key result #2)
- Use social media to the fullest extent possible (strategic plan key result #4)

#### **Tactics:**

- Offer automated monthly giving
- Create a dynamic data base through donor research and prospecting tools
- Multiple asks during the year for current donors of \$100 or less
- Integrate personal phone calls and e-mails when appropriate
- Use social media to educate and enthruse

### ANNUAL FUNDRAISING PLAN TEMPLATE EXAMPLE ACTION PLAN

#### **September through December:**

- ☐ Clean up DonorPerfect data (CG)
- ☐ Enhance staff knowledge on DonorPerfect through increased training (CG)
- ☐ Design and write solicitation package (JB)
- ☐ Utilize social media networks (JB, JH)
- ☐ Mail fall (first) solicitation to renewal donors (JB)
- ☐ Mail fall (first) solicitation to lapsed donors and targeted prospects (JB)
- ☐ Target employee solicitation (JB)
- ☐ Prepare and send e-blast follow-up to targeted renewals and acquisitions (JB)
- ☐ Implement solicitation into new employee orientation (JB)

#### **January through May:**

- ☐ Design and write new solicitation package (JB)
- ☐ Ramp up social media networks with targeted messages (JB, JH)
- ☐ Mail second solicitation to targeted donors who have yet to renew, targeted lapsed donors and targeted prospects based off earlier results (JB)
- ☐ Re-energize staff campaign via ECC today and message in pay packets (JB)
- ☐ Follow up e-blasts and phone calls to targeted donors, lapsed donors and prospects (JB)
- ☐ Mail letter to current donors of \$100/under for additional support (JB)

#### **June through September:**

- ☐ Reach out to any constituents via direct mail, e-mail and phone who would have a high propensity to give based on current results (JB)
- ☐ Analyze results and prepare for 2014/15 campaign (JB)

# SPECIAL EVENT TEMPLATE

- Be specific
- Include a detailed budget
- Assign staff roles and responsibilities
- Outline the chairperson(s) role and responsibilities
- Outline the committee members roles and responsibilities
- Determine a timeline for the roles and responsibilities of staff, chair(s), and committee members



DATE: \_\_\_\_\_  
LOCATION: \_\_\_\_\_  
TIME: \_\_\_\_\_

2020 Actual: \_\_\_\_\_

2020 Actual Attended: \_\_\_\_\_

Synopsis: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Revenue	2019 Budget		Expenses	2019 Budget
	\$0.00			\$0.00
	\$0.00			\$0.00
	\$0.00			\$0.00
	\$0.00			\$0.00
	\$0.00			\$0.00
	\$0.00			\$0.00
	\$0.00			\$0.00
	\$0.00			\$0.00
	\$0.00			\$0.00
	\$0.00			\$0.00
	\$0.00			\$0.00
	\$0.00			\$0.00
	\$0.00			\$0.00
	\$0.00			\$0.00
	\$0.00			\$0.00
	\$0.00			\$0.00
Total Revenue	\$0.00		Total Expenses	\$0.00
Net Revenue: \$0.00				

- Beware of plug and play budget
- Determine ROI
- Volunteer deployment

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<b><u>SPECIAL EVENT PLAN TEMPLATE</u></b>			
		DATE _____	
		LOCATION _____	
		TIME: _____	
Budgeted Net: _____ Number Attending: _____		2020 Actual: _____ 2020 Actual Attended: _____	
Synopsis: _____ _____ _____			
<b>Budget</b>			
Revenue	2019 Budget	Expenses	2019 Budget
	\$0.00		\$0.00
	\$0.00		\$0.00
	\$0.00		\$0.00
	\$0.00		\$0.00
	\$0.00		\$0.00
	\$0.00		\$0.00
	\$0.00		\$0.00
	\$0.00		\$0.00
	\$0.00		\$0.00
	\$0.00		\$0.00
	\$0.00		\$0.00
	\$0.00		\$0.00
	\$0.00		\$0.00
	\$0.00		\$0.00
	\$0.00		\$0.00
<b>Total Revenue</b>	<b>\$0.00</b>	<b>Total Expenses</b>	<b>\$0.00</b>
<b>Net Revenue: \$0.00</b>			

## SPECIAL EVENT PLAN TEMPLATE CON'T

**Committee:**

- Chair:
- Co-Chair:
- Volunteer Chair:
- Members:

**Chairperson's Role/Responsibility:**

- 
- 

**Committee Member's Role/Responsibility:**

- 
- 

**Staff Roles:**

Supervisor:

- 
- 
- 

Event Planner Role:

- 
- 
- 

**Challenges:**

- 
- 
- 

**Strengths:**

- 
- 
- 

**Outcomes:**

- 
- 
- 

**Tactics:**

- 
- 
- 

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# MILESTONES

## September - December



- ☐ Obtain a minimum of 100 donors through direct mail.
- ☐ Acquire a minimum of 500 new e-mail addresses.
- ☐ Select six Distinguished Alumni award winners
- ☐ Secure and confirm 4 major sponsors for keystone events.

## January - April



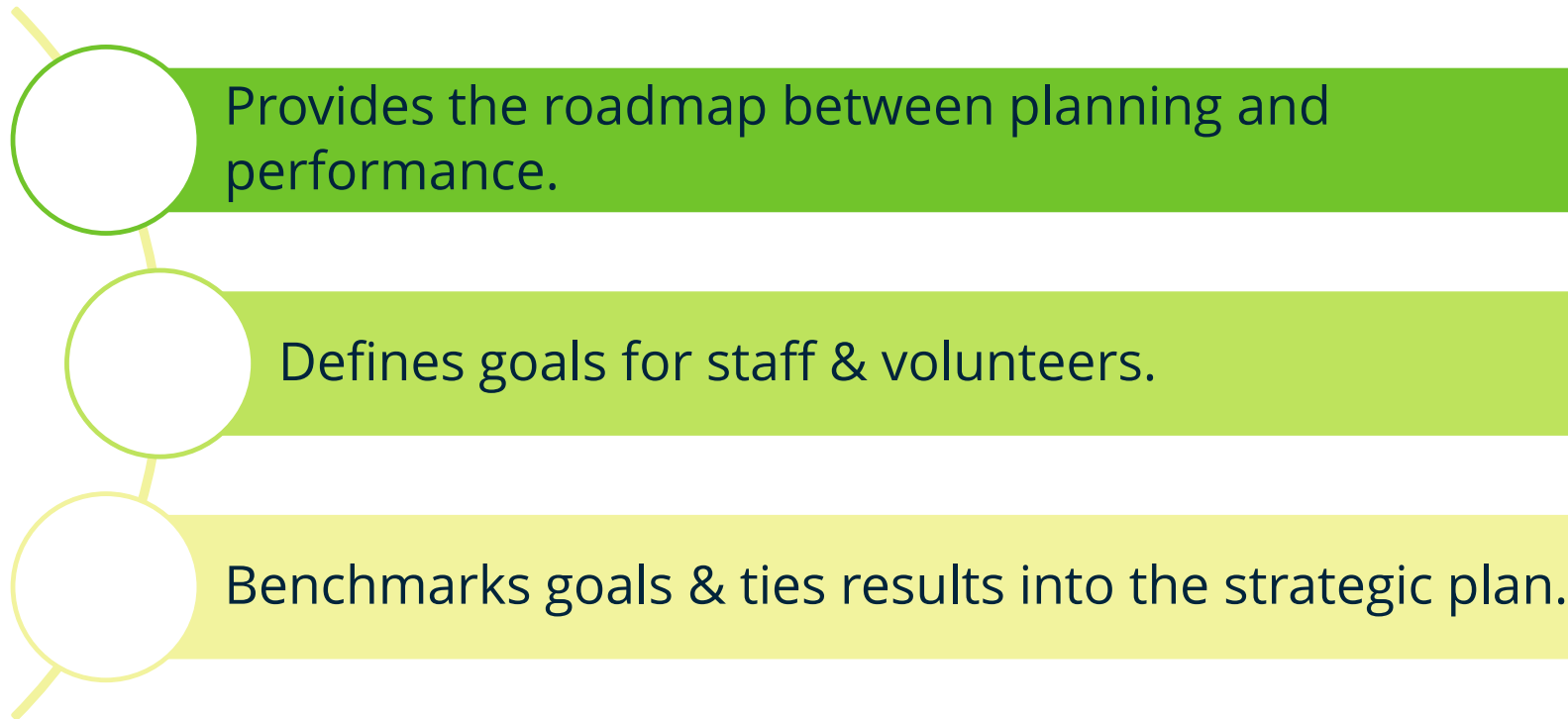
- ☐ Implement opt-in e-mail program for alumni with a minimum of 500 alumni.
- ☐ Complete first alumni magazine.
- ☐ Have a minimum of 800 friends on Facebook.

## May - August



- ☐ Secure new funding for 10 new two-year scholarships.
- ☐ Have a minimum of 1,400 friends on Facebook.
- ☐ Have a minimum of 1,000 new alumni on opt-in e-mail program
- ☐ Secure a minimum of 10 new corporate gifts of \$1,000 or more.

# BENEFITS





Gratitude

+

Impact

=



# KEEP GIVING. CURRENT DONOR RETENTION

- The Fundraising Effectiveness Project (FEP) *2019 First Quarter Report* found that the total number of donors decreased by 5.7 percent in the first quarter of 2019 compared to the first quarter of 2018, while overall revenue dropped 2.2 percent.

# KEEP GIVING: CURRENT DONOR RETENTION

- The overall retention rate, a critical metric for charities as it measures the number of donors who continue to give to the same organization from one year to the next, also decreased by 0.9 percent.

# KEEP GIVING: CURRENT DONOR RETENTION

- Perhaps the most troubling figure is the number of new donors, which dropped by 10.5 percent for the quarter.



# KEEP GIVING. CURRENT DONOR RETENTION

- “Fundraising is about creating relationships with donors, so that the individual who starts with a \$50 contribution makes increasingly larger and larger gifts throughout the years and ends up being a major donor.  
- Ben Miller, Chief Analytic Officer at DonorTrends

# KEEP GIVING. CURRENT DONOR RETENTION

- “But if charities are not attracting new donors in sufficient numbers—creating a pipeline of future funders and supporters—then their ability to accomplish their missions and provide services are put into real jeopardy.”

- Ben Miller

# KEEP GIVING: CURRENT DONOR RETENTION

- “Charities are neither attracting new donors effectively, nor are they keeping them effectively, judging by the continued drop in retention rates shown in our quarterly reports,”
  - Elizabeth Boris, Chair of the Growth in Giving Initiative.

# KEEP GIVING: CURRENT DONOR RETENTION

- “All the signs point to charities focusing more and more on larger donors—but there are only so many donors of wealth who can continue to support so many charities and causes. This situation isn’t tenable in the long-term for a healthy and vibrant charitable sector.”

- Elizabeth Boros

# INSPIRATIONAL FUNDRAISING: IGNITING ACTION



WE'LL BE *better together* AT  
NONPROFIT DAY WITH HELP FROM:

*Jeff Bagel, Ted Wood,  
& Jonathan Rilling*

NONPROFITDAY2019.ORG



Thank you for attending  
Inspirational Fundraising:  
Igniting Action!