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
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.
It’s been reported that nearly 50% on nonprofit fundraisers would like to quit their current role.
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.
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
“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.
We have to preserve ourselves.

The work we do directly makes the world a better place!

We take all of that on our shoulders.
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 assistance.
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.
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
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.
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.
DOB Effect

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

Doing
Our
Best
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 motivated.
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**

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

- 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 its 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

- Cross-training
- Ability to manage staff and volunteers

Clearly defines roles and responsibilities
UNDERSTANDING THE NEED FOR A FUNDRAISING PLAN

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

Sets expectations
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

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

Strong institutional knowledge
UNDERSTANDING THE NEED FOR A FUNDRAISING PLAN

- 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

- Helps maximize fundraising efforts

Creates a culture of giving
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

Donors:
- Ashley Andrews
- Rex Buffalo
to Maru Cartier
- Don Juan Dwyer
- Clint Eastwood
- Clifford Farrell
- Greg Brady
- Ashton Horan
- Ernest Humperdink
- Briggs Matos
- Morris McCurdy
- Bob Newman
- Zahm Padowski
- Jamie Ray
- Steven Striesand
- Taylor Swain
- Jacinda Thomas
- Bruce Wayne
- Eric Wright
- Vito Zarella
- Louis Noce
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.

<table>
<thead>
<tr>
<th>Year</th>
<th>Budgeted Goal</th>
<th>Achieved Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td>2020/21</td>
<td>$580,000</td>
<td>$45,000</td>
</tr>
<tr>
<td>2019/20</td>
<td>$580,000</td>
<td>$47,250</td>
</tr>
<tr>
<td>2019/20</td>
<td>Number of Donors: 1,193</td>
<td></td>
</tr>
<tr>
<td>2019/20</td>
<td>Number of Donors: 1,455</td>
<td></td>
</tr>
</tbody>
</table>

**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 on-line/year-end 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)
- 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 where appropriate
- Use social media to educate and enthuse

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**ANNUAL FUNDRAISING PLAN TEMPLATE EXAMPLE ACTION PLAN**

**September through December:**
- Clean up DonorPerfect data (CO)
- Enhance staff knowledge on DonorPerfect through increased training (CS)
- 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 on earlier results (JB)
- Re-energize staff campaign via EEC today and message in pay packets (JB)
- Follow up e-mails and phone calls to targeted donors, lapsed donors and prospects (JB)
- Mail letter to current donors of $100+ to show appreciation, 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
Special Events Plan Basics Section

- Beware of plug and play budget
- Determine ROI
- Volunteer deployment
Here is what the Special Events Plan template/download will look like:

**SPECIAL EVENT PLAN TEMPLATE**

**DATE:__________**
**LOCATION:__________**
**TIME:__________**

Budgeted Net: ____________
Number Attending: ____________

[Template details continued]
<table>
<thead>
<tr>
<th>MILESTONES</th>
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<tbody>
<tr>
<td><strong>September - December</strong></td>
</tr>
<tr>
<td>- Obtain a minimum of 100 donors through direct mail.</td>
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<tr>
<td>- Acquire a minimum of 500 new e-mail addresses.</td>
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<tr>
<td>- Select six Distinguished Alumni award winners</td>
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<tr>
<td>- Secure and confirm 4 major sponsors for keystone events.</td>
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</tbody>
</table>

| **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. |
Provides the roadmap between planning and performance.

Defines goals for staff & volunteers.

Benchmarks goals & ties results into the strategic plan.
Gratitude + Impact = Results
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.
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.
Perhaps the most troubling figure is the number of new donors, which dropped by 10.5 percent for the quarter.
“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
“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
“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.
“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!