Connecticut Philanthropy Day Presentation Outline

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Building Relationships with Donors by Creating Extraordinary Experiences and How To Advance Your Career (Two Part Presentation)

33 minutes (60%)- Donor Return On Investment(ROI)-How to Increase Donor Impact Through Enhanced Communication & Extraordinary Engagement

The best practices to enhance donor retention through extraordinary experiences and includes many Connecticut examples. "Staying in touch with your donors, past and present, and letting them know their support impacts the work they are passionate about will keep them engaged…and receptive to increasing their support as they are able. More than five decades of Giving USA data show that donors want to make a difference. You just have to show them how they can". You'll learn how the best do it.

Brief Overview: Why focus on donors? Because individuals give 80% of philanthropic dollars each year. Giving by individuals rose modestly to an estimated 2.7 % in 2010, representing 73% of the total giving of $290.89 billion in 2010, according to Giving USA 2011. The report also indicates that charitable bequests rose an estimated 18.8 % while foundation giving was essentially flat, falling an estimated 0.2%. It is however a crowded field with the number of non-profits in the U.S, doubling the past 15 years to 1.5 million. In Connecticut there are 25,864 non-profits registered.

Communicating and Connecting-"Staying in touch with your donors, past and present, and letting them know their support impacts the work they are passionate about will keep them engaged…and receptive to increasing their support as they are able. More than five decades of Giving USA data show that donors want to make a difference. You just have to show them how they can" (Foreword, Giving USA 2011 Executive Summary).

Current dichotomy. Public interest in fundraising and philanthropy never higher. "However, can't seem to get this interest to translate into more engagement-the kind of engagement we need if we are to address the issues of the future. I believe the answer lies in how we communicate, connect and inspire people. And how we communicate **impact,** not just our organization's impact but how donors are effecting their communities and the world….our fundamental challenge is that most people simply don't realize they can have…" Andrew Watt, AFP CEO.

Nonprofits Retained More Donors in 2010, Report Shows

Nonprofit organizations in the U.S. were better at retaining donors and shored up their net losses in donations in 2010, according to the Aug. 30, 2011 report of the Fundraising Effectiveness Project (FEP).

The FEP, a report of the Association of Fundraising Professionals (AFP) and the Center on Nonprofits and Philanthropy at the Urban Institute, compares gains and losses of donors and donation amounts. More than just a look at total revenue and the total number of donors to a given organization, the FEP indicates year over year growth by comparing how many new donors are acquired with how many stopped giving, and the donation levels of each.

In a promising trend, nonprofits gained more new or reactivated donors than they lost in lapsed donors in 2010. Organizations saw an average net increase of 1.7 percent in the number of donors. This compares favorably to a -3.2 percent average net loss of donors in 2009.

Other Findings

Growth-in-giving performance varies significantly according to organization size (based on total amount raised), with larger organizations performing much better than smaller ones.

- Organizations raising $500,000 or more had an 8 percent net gain.
- Organizations raising $100,000 to $500,000 had a 2.3 percent net gain.
- Organizations in the under $100,000 groups had a net loss of -12.2 percent.

The largest growth in gift dollars/donors came from new gifts/donors, and the pattern was most pronounced in the organizations with the highest growth-in-giving ratios.

The greatest losses in gift dollars/donors came from lapsed new gifts/donors, particularly in the organizations with the lowest growth-in-giving ratios.

The results are based on 2,377 nonprofit responses comparing 2009 and 2010 data received as of February 2011.

Priority One: Your Existing Donors

Research shows that it usually costs less to retain and motivate an existing donor than attract a new one. Fundraising organizations spend $2 to raise $1 from a new donor. Then 2 times out of 3, that new donor is lost and never makes another gift. Your organization may have raised more money this year, but have you sacrificed larger, exponential growth by constantly churning through donors, losing just as many as you have gained? "Real" fundraising growth comes about by not just raising more money this year than the year before, but rather building and upgrading your donor base in the long term and minimizing your losses from lapsed or downgraded donors.

By focusing on retaining existing donors, there is less money that you have to spend recruiting new donors to replace your losses. Taking positive steps to reduce gift and donor losses is the least expensive strategy for increasing net fundraising gains.

Plus, the longer you keep your donors and cultivate them effectively, the more they will give over time. If people stay for longer they can upgrade their giving, give to a capital campaign, become a regular (sustainer) giver, volunteer, recommend a friend and perhaps even offer a bequest. This is called by Simone Joyaux as raising your DCQ (donor-centered quotient).

Professor Adrian Sargeant. You remember "The Emperor's New Clothes," the Hans Christian Andersen tale?
Two unscrupulous weavers sell the emperor a suit of "invisible" cloth which they claim only the worthy can see. The emperor, unwillingly to admit *he* can't see it, parades through the city "wearing" the magic suit. His subjects dutifully go along with the game. The hero is a child who cries out, "But he's naked!"

Adrian Sargeant is this child. He was a professor of marketing in the UK before he turned his attention to the fundraising world. I think he was shocked to find that many "best practices" of fundraising, an enterprise undertaken internationally by millions of charitable organizations, seem based on little more than accepted wisdom and certainly not on science.

He is trying to change that precarious state of affairs by conducting original, rigorous research. He has unearthed, for instance, the **principles that tend to increase donor loyalty**. He advocates adopting **Lifetime Value (LTV)** as the true measure of donor worth, a concept that, in effect, turns *every* donor into a potential *major* donor.

And he insists that fundraising programs cannot systematically improve their performance without adopting basic feedback mechanisms common in marketing, such as **donor satisfaction surveys**. His three are **Tiny Essentials of Donor Loyalty**, **Fundraising Principles and Practice**, and **Building Donor Loyalty**.

Donor Relations/Stewardship-Relationships are critical in fundraising. The focus of philanthropy must be relationship-building that is customized to the needs and desires of the donor. Individuals have different motivations for and patterns of giving. The more an organization knows about potential donors’ motives and how they like to give, the better positioned it is to make effective solicitations.

Cultivation-essentially, cultivation is what is done to maintain and expand the audience's commitment to the organization and its programs. It's also what is done to encourage donors to give again, and at higher levels.

Participate in moderated discussions with experts in the field
Become a member of the organization
Volunteer for a special project
Participate in an online survey or auction
Take an on-line or in-person course
Purchase items the organization offers for sale

Personal connections with a charity are important to people who offer philanthropy, new research from Univ. of Texas and other universities confirms.

Trust-is key for Millennial Donors-not self centered, ages 20-35 are in fact, diverse and ready to give, spread over three more organizations. Correlation between giving and engagement-those who donated more gave more of their time. 84% most likely to donate when they fully **trust** organization. 85% motivated by compelling mission and 56% by personal connection or **trust** of leadership.

Accountability, Impact Build Trust in Nonprofits for Wealthy Donors Providing evidence of what their contributions have accomplished and abiding by high levels of accountability are the two critical ways that nonprofits can build trust, especially for wealthy donors, according to a 2006 survey.

Philanthropic Beliefs & Behaviors of the Wealthy, conducted by the New York City-based Wealth Institute in association with Philanthropy Now, queried more than 900 wealthy consumers with a median age of 43, average household income of $330,000 and average net worth of $2.4 million.

When asked what builds trust in nonprofits, respondents showed a strong emphasis on impact and accountability:

- **70 percent say they want disclosure of what their donation accomplishes (engagement)**
- **56 percent want the ability for anyone to review the financial statements of the nonprofit (consider placing on website)**
- **51 percent want independent audits (consider placing on website)**
- **50 percent want disclosure of staff compensation and perks (consider placing on website)**

Violating Trust-Some 9/11 Charities fail to fulfill promises –

Americans eager to give after the 9/11 terrorist attacks poured $1.5 billion into hundreds of charities established to serve the victims, their families and their memories. But a decade later, an Associated Press investigation shows that many of those non-profits have failed miserably.

There are those that spent huge sums on themselves, those that cannot account for the money they received, those that have few results to show for their spending and those that have yet to file required income tax returns. Yet many of the charities continue to raise money in the name of Sept. 11.

One charity raised more than $700,00 for a giant memorial quilt, but there is no quilt. Another raised more than $4 million to help victims, but didn't account publicly for how it spent all of the money. A third helps support a 9/11 flag sold by the founders for-profit company. There are other charities that can account for practically every penny raised - except that all the money went to pay for fundraising, and not the intended mission. To be sure, most of the 325 charities identified by the AP followed the rules, accounted fully for their expenditures and closed after fulfilling identified goals.

More Traditional Donor ROI Communication Tools but with a Donor Focused Approach

But you **do** need a donor newsletter that regularly reports on what you've achieved thanks to philanthropy ... and that lavishly appreciates the donor's involvement (a.k.a., donor-centricity). *That* kind of newsletter is the secret behind great retention and higher lifetime value (so says communication guru Tom Ahern).

Delivering extraordinary experiences to donors

Communications and cultivation strategies, tactics, and tools

"If I become a donor, I, in effect, am adopting that organization as if I worked there or owned it or had a close experience, ties with it. It becomes an investment that I want to follow and see success. My grants are not gifts. They are investments." [Lorry I. Lokey, *The Chronicle of Philanthropy*]

"They get to dream together with us and have the opportunity to join with us in making our shared dream a reality." [Diana Miller, Saint Mary's University Philanthropy and Development Program]

"What is the value of interactions that contain no understanding of us and that contribute nothing to a shared store of human meaning?" [Sherry Turkle]

1. The planning process and your written plan

A. Some things for everyone but not everything for everyone. How do you decide who gets what?
B. Selecting those for deeper relationship building. Who are your target audiences? What are your criteria?
C. Assigning portfolios of work to staff and volunteers
D. Holding people accountable for effort – and results?

2. Delivering exceptional experiences
   A. Help donors dream.
   B. Your organization is the conduit to achieve the donor's desires. Show me, the donor, how I make a difference.
   C. Truly engaging donors – and even creating a tribe.
   D. Offering donor choices – like what?
   E. Being helpful is the new black. "It's simple, descriptive, it inspires action, evokes emotional intelligence and it's sustainable – all in one phrase."
3. Perks that seem to interest donors
   A. Information (insider stuff; proof that their giving matters; knowledge that's not easily found otherwise)
   B. Access (tours, backstage passes, time with your most interesting people)
   C. Gifts from corporate partners (stuff that doesn't cost anything to your organization)
4. Tactics and tools: both communications and cultivation, online and off.
   A. Donor newsletters: Don't dismiss print.
   B. Inside Updates: Special letters. Cultivation Gatherings.
   C. Mingling and Schmoozing at events and programs – Board members and staff do this. And you, too.
   D. Thank-you calls by board members – And thank-you might evolve into a deeper conversation.
   E. Even more personal contact, face-to-face if possible
   F. Regular focus groups – If I ran a development office right now, I'd do focus groups all the time about lots of different things.
   G. <u>Interview donors for their philanthropic stories.</u>

Why the Donor's Story Matters (AFP wWire)

(May 17, 2011) Understanding why a person donates money to any charity will help you understand why they might donate to yours. Here are some ways to take a step back and really understand a prospective major gift donor--their philosophy of giving, their giving priorities and even their views on money itself.

AFP eWire interviewed consultant and strategist Debra Minton, President of Philanthropia Partners in Grand Rapids, Mich. The topic was major gift donors--specifically, asking the right questions and taking the time to really listen.

"I have always counseled volunteers and key staff to try to get to the ‘listening post' whenever possible, and as quickly as possible, when on major gift visits" says Minton. "As fundraisers we will often go in so nervous and structured that we overlook what the donor wants."

If we stop and listen to hear the donor's approach to their giving, why they give and what they dream to achieve, the direction of the call--and ultimately, the relationship--will become apparent, she explains.

Asking Good Questions

A good question goes deeper than simply asking about their giving history.

Ask donors to talk about and identify the history and roots of their giving philosophy, Minton says. "Did your parents participate and engage in civic and community life?" "What did that look like?" "What values have you carried on in your own life?"

Perhaps their approach to money traces back to childhood. "Did you receive any lessons about money as a young person that stick with you today?"

Another good question is, "What keeps you up at night?" In other words, what does the donor really care about? Is it the environment, their community, youth? What is it about those issues that compel them?

As you begin to paint the picture of the donor's giving priorities, ask "How do you see yourself contributing to that issue? Is it with your time, ideas, relationships, voice or money?"

The key here is that you are not telling them why they should give to your organization. You are asking them why they give to any organization, then which ones in particular, and why some concerns stand out as priorities in their minds.

With the "listening post" approach you can determine the direction of your conversation based on the answers you receive, rather than the points you feel you need to make, Minton says. It is a win-win situation because you will only deepen the relationship you have with the donor, who is often excited to discuss her dreams. You are also more likely to have a future meeting because she enjoyed the conversation so much.

How Do You Fit In?

Once you have a better grasp of the donor's story, you can begin to explore how their story might weave together with your organization's--or more importantly--to the story of those you serve. "Figure out how you can run up alongside a donor and help them as they focus their efforts to make a difference," Minton says. In other words, make it a partnership. "The gifts I have seen that have been the most satisfying is when the donor and the organization actualized a new vision that they co-created for the organization," Minton says. "When a relationship becomes that rich, it is the most powerful work a fundraiser can do."

Add this to your major gifts program to-do list: Have a dialogue with a donor about why they give. You'll hear some great stories. And you'll write new ones with the people you serve in leading roles.

Examples of Outstanding Donor Centered ROI

Turning Point Case For Support

This case for support has a divinely realized “browser level.” Just read the headlines.

Mayo donor newsletter

Mayo is known for the world-class quality of its health care. And its twice-yearly donor newsletter is no slouch, either: it makes donor-centricity a core value. See how they handle the job of making the donor feel a part of the team.

United Way(Rich VA) quarterly news 2011

Ladies and gentlemen, we have a winner! This fast and just plain inspiring United Way quarterly newsletter does what so many other so-called “donor” newsletters oddly fail to do: put the donor in the center, as the hero. It goes to “Leadership Donors,” who give $1,000 or more annually. It does not include a gift envelope (for now). Read it. Copy it. My promise to you: when you go donor-centric like this, you will have far happier (and far more loyal) donors… and you know what that leads to.

Rowan Regional Hospice Christmas Appeal

Diane Dillon Hooper, director of the Foundation, proved that personalization can make “a huge difference” to charitable income. The old Christmas appeal was a printed card without personalization. It netted a mere $1,000. The new, personalized letter, sent to “a list of families served by our Hospice, anyone who had donated to Hospice during the past two years, and other ‘special friends’ (board members, staff, churches, etc.)” netted $17,454.65 in gifts in 2010. It was mailed to 2,000 addresses and garnered 191 gifts, averaging $92.96. (not attached)

Pat Smithwick at the Bethel (CT) Visiting Nurse Association got lots more right than wrong in her appeal letter. This is an outst

Royal Children's Hospital Foundation donor newsletter- This wonderful donor newsletter from Oz has 99% right. There are a couple of minor questions, but, wow, this is donor-centered material, filled with stories and charm

Women's Center of Southeastern Ct-first person stories of victims of domestic violence and the impact on the family and the community and how the donor's contribution has made a difference to that family. It is a $1million operation based in New London, CT serving New London County. Two men on staff in 1999 and several on the Board of Directors.

> Men Against Domestic Violence (MADV) -1999-begqan a campaign targeted to men, a largely untapped different audience of support for the agency. Led by men-honorary chair-Dick Blumenthal and now lists the men on the Board of Directors. Names appear in the Norwich Bulletin and The Day newspapers on Father's Day in a large print ad donated by the newspapers. Can opt out of publishing name. "Help Wanted for 1,000 " ad as flyer for solicitation.
>
> Impact ROI-clearly presented in "Last Year, the Women's Center…"
>
> Dec. 10, 2010 Christmas Solicitation-'You' focus. Your gift. Actual story of mom and child with some impact indicators and P.S. of a young child crayon client drawing and Thank You Flyer with client thank you quotes.
>
> July15, 2011 Direct mail with client Mary's Story in her own words-'A Journey from Darkness to a New Life'.
>
> Charlene is not alone-Phoebe-includes handwritten note from a domestic violence client with actual child drawing and what the gift can provide….

The Fidelco Guide Dog Foundation invites donors who make a specific level gift to have a Puppy Socialization Experience. A donor can invite family, friends or co-workers to the Fidelco campus where they have lunch hosted by Fidelco staff and learn about Fidelco's program and some of the people who have partnered with Fidelco German Shepherd Guide Dogs. After lunch, it is off to the Norma Pfriem Puphouse where they will participate in socializing and training young puppies under the guidance of Sally Keating, Director of Volunteer Puppy Raiser Program. After tiring out the pups, the group meets a Fidelco Trainer/Instructor to hear about Fidelco's guide dog training process. For a short time, they will experience what our clients feel when holding the guide dog harness and giving the "Forward" command as they take a blindfold walk with Fidelco Guide Dog in training. It is an excellent opportunity to experience the Fidelco program from Pup to Partner. (not attached)

Trust House Family Learning Center, Hartford, 2007 (now merged with another organization)- operating a literacy program in Hartford. One of their tutors (who was also a board member) was so moved by helping his student to read that we created a scholarship program with his kick off gift and provided support for two years at Capital Community College. That same Board Member then encouraged other board members to match his gift. It snowballed from there.(not attached)

Women: Taking the Lead in Charitable Giving

http://www.afpnet.org/newsletters/k/summer2010/women.html Women donors have emerged as a power in charitable giving, and their growing economic status greatly affects their participation in philanthropy. Grant Thornton, a global audit, tax and advisory organization headquartered in Chicago reported that gifts from women topped those from men by almost $5 billion in 2005, the last year for which the IRS included gender information in its publicly available gift tax return data. For a nonprofit organization seeking to cultivate women donors, understanding how women's philanthropic objectives differ from those of men is of utmost importance. According to Nicky McIntyre, executive director of Mama Cash in The Netherlands, the oldest international women's fund, men tend to be driven to philanthropy by the desire for influence and recognition, whereas women are typically more emotionally attached to the missions of the organizations they fund. Women also tend to be more relationship-oriented and seek to form collaborative networks with other like-minded people, becoming "partners" with the organizations they support. They strive to do more than simply give money; they also want to offer their time and expertise and learn in the process

One prominent way that women engage in charitable giving is through giving circles—philanthropic vehicles in which individual donors pool their money and other resources and decide together where to donate them. Giving circles include social, educational and engagement components that connect participants to their communities, while increasing their understanding of philanthropy and community issues. A 2007 study, More Giving Together, from the Forum of Regional Associations of Grantmakers in Arlington, Va. (**www.givingforum.org**), identified more than 400 circles, engaging more than 12,000 donors and giving close to $100 million over the course of their existence.

Some Tips for Building a Successful Women's Initiative at Your Organization
Offered by Andrea Pactor, program manager for Philanthropic Services at the Center on Philanthropy at Indiana University

• **Make the connection between women who volunteer for or are otherwise active in your organization and their giving potential.** Even if you don't have a women's alliance, you do have a database. How do you list your donors? Who pays attention to the name on the check? Who follows up with the consistent annual women donors in the $100 to $250 range? Take the time to identify 100 in that group, assess their capacity, invite them to learn more about your organization and engage them.

• **Consider generational differences.** Develop targeted mailings, programs and events to engage women from different generations. Baby boomer women might have different expectations of your agency than older or younger women.

• **Engage women donors.** Women's giving circles have proliferated and achieved considerable success around the country, in part because they offer opportunities for networking, socializing and engagement. As fundraisers seek to move women donors up the giving ladder, they might offer a variety of programs and events to better connect donors to the organization.

Example: Project Based-Museum with an exhibit by young women artists that may highlight the exhibit on its website to attract supporters specifically interested in the work of young women artists.

Some Tips for Retaining Women Donors

• **Stay connected** through newsletters, the Internet or personal contact. It is crucial to be transparent in your communications.• **Provide opportunities for involvement.** Involve and recruit women in decision-making roles, such as board and committee members, foundation executives, development officers and volunteer fundraisers. • **Offer networking options and workshops** focusing on topics such as money management, investing and philanthropy.

Ways of Asking for the Gift

"Last year you generously contributed $25 to support our Annual Fund. This year, I hope you'll consider a gift of $50 to help us reach our more ambitious goal."

What you see above is the usual way fund raisers try to encourage donors to give more. It works. Sure. But there are more imaginative ways to ask – *much* more imaginative ways – and experience shows that they often work better. The ones you see below have brought in direct mail gifts of $100, $1,000, and even $5,000.

So, how do you increase giving? Here are six ways to do it:

1) Ask for just one amount – and make it significantly more than the donor's highest previous gift. This may startle the donor, but it will also challenge her to rethink your cause and her giving patterns.

2) Describe BIG projects – projects with high status and significant impact.

"Our delegation will include members of Congress, business persons and journalists. I hope you will support this dramatic private initiative with a special gift of $1,000"

3) Invite the prospect to be part of a more exclusive group of supporters.

"I am turning to you, and to 25 other special friends of the Center, to ask that you provide leadership gifts of $5,000."

4) Change your language when asking for larger gifts.

"Your gift of $500 will be an investment that will underwrite this project."

5) Offer your donor publicity – recognition for his or her larger contribution. (But be sure to give the donor a chance on the gift card or reply device to make the contribution anonymously. Not everyone likes publicity.)

"When you underwrite this venture with a gift of $1,000, you will be joining others in the film industry as well as leading private citizens. Your name as an Associate Producer will be listed on the credits of this powerful video, as it is distributed across the country!"

6) Take a different tack. Don't ask for a bigger gift. Ask for *more gifts*. For example: increase the number of gifts by using monthly giving options: $20 a month equals $240 a year. Requests for monthly pledges work well in thank-you letters and in appeals to donors who've given you more than one gift.

Only a small number of donors will make monthly pledges. You'll have to wait a few years before there's a meaningful number of monthly donors. But eventually these monthly pledgers will provide a significant portion of your cause's annual income.

"Your generous gift of $20 arrived yesterday, and I'm writing to say how much the Center appreciates it and to assure you that it will have an immediate, positive impact on the children here. But this letter has another purpose, too: To invite you to join the 'Partners in Caring,' a group of donors much like yourself who support the Center with regular monthly gifts. If you could do what you did this month, every month, the impact of your support will be tremendously amplified."

Donor Centered Relationships and Strategies: Building Relationships with Donors by Creating Extraordinary Experiences

Example: Asking the donor why do you give the gift-What did it mean to you? Interviewing the significant donors and developing an interview that could be captured on video and/or developed into their Philanthropic Story, also written, that can then be given to their family including children to understand the importance of giving and to continue the legacy. This creates a meaningful experience for the donor and the development staff preparing such a "tool". This is then utilized, with permission by the organization.

Example: Rhode Island Zoo –donors invited to actually feed the animals and use photo and video.

Example: International Institute of Rhode Island-org. involved in helping immigrants. Donors invited to meet new immigrant children at the airport and bring a teddy bear to the young child. Priceless opportunity.

Example: "Tom and I knew that Equity Action, the LGBTQ (the lesbian, gay, bisexual, transgender, queer, and questioning) fund at the Rhode Island Foundation, would ask us for a gift. We told them to ask us, and we planned to give. There were only two questions left really: Would Equity Action follow the tips we had shared with them as volunteers? How much would we pledge?

Here's what happened:

One morning a representative from Equity Action called to set up an appointment. The caller thanked me for our volunteer support and requested a time to meet with Tom and me. The called also asked, "Since you are our friends, can we send someone who is inexperienced in soliciting, because you are safe and will give?"

My response: "Yes, that is fine. But send the right person, and we will give a larger gift." I figured it was their job to figure out who the right person was.

We met up for the solicitation. In the room: Simone; Tom wasn't able to join us. Kris and Peter from Equity Action. Peter was the co-chair of the fund's advisory council at that time. Kris was a program officer from the Rhode Island Foundation.

I'd never met Peter. But given the request they made, he was an appropriate person by virtue of position.

And then there was Kris: the right person.

I'd met Kris a couple years earlier when I founded the Women's Fund. The Rhode Island Foundation assigned Kris as one of two program officers to help with the Women's Fund, then a field-of-interest fund within the foundation.

Kris and I worked together for several years. Oh, how angry we both were—and still are—about the social injustice in Rhode Island, in the United States, and worldwide. Sexism. Racism. Homophobia. Classism. Kris and I got to know each other's interests and values. During meals to raise charitable contributions. Kris even asked me, as a volunteer, to help draft the values and mission of Equity Action. I was elated. (See Appendix 4A for the Equity Action materials)

So Kris was absolutely the right person to make this ask. Remember those seven emotions from the direct mail industry? Remember Mal Warwick's five emotions? Remember Tom's twinsets? Kris knew my feelings, and she honored those in the solicitation.

In fact, it was the best solicitation I've ever experienced as a donor.

Kris and Peter acknowledged my **anger** about social justice. They complimented me for my work as the founder of the Women's Fund. The three of us shared stories about social justice, and you could hear the anger vibrating in the room.

You could hear the **fear** we shared, that so many people are excluded – women, our friends who are not white, gays and lesbians, those who are not affluent. We talked about how each community is less than it could be because the playing fields aren't even close to level.

And then Kris said: "You and Tom are the first straight people we are asking to give to Equity Action. We ask you first because we know you two care so much and fight hard for justice."

I was **flattered.**

Then she said, "We ask you first because you are well known in several circles in this community. And people know you are straight. Your support will show that heterosexuals care about social justice for the LBGTQ community. Your gift will help leverage gifts from others."

I was even more **flattered**. I felt part of an **exclusive** group of people who care about social justice. And if a gift from Tom and me will help others to give, I'm thrilled. (I'm **greedy** for more donors to social justice.)

And of course, the whole conversation was about **salvation** – what Tom and I believe is our life's work and our salvation as human beings. And the commitment of Kris and Peter and everyone involved in Equity Action and the Women's Fund and social justice.

Then Kris said, "We're asking you and Tom to become founders to Equity Action. You will be recognized in perpetuity as a founding donor."

Okay. The money piece. Tom and I had already decided to give about $2,500. (A note to Kris when you read this book: Did I tell you that Tom and I had already picked a figure?)

Then I think Peter may have said, "Being a founder of Equity Action, recognized in perpetuity, is a minimum gift of $5,000."

And I responded, "This gift will be from Tom and me together. He wants to help make the decision. I will speak with him and let you know"

As I left the building, I called Tom on my cell phone. I told him every single detail. He kept saying "Yes, Kris heard all the things we told her about fund development. Good for her!"

Of course we became founders, giving twice as much as we expected to give. And two years later, when George W. Bush was reelected President of the United States – and states around the country adopted antigay legislation – we sent another gift (large for us) to the Equity Action endowment fund.

What did this mean for us? A gift for all our friends gay and straight, women and men, of different ethnicities and cultures, poor or affluent. For social justice. For our own salvation."

Example: Conversation with Donors At The Rhode Island Foundation

"'This story aptly demonstrates two steps in the relationship-building process, specifically gaining deeper understanding (Step #3) and nurturing the relationship (Step #5). Ten years ago, Carol Golden and Rick Schwartz began interviewing endowment donors to The Rhode Island Foundation, because legacy is implicit in their gifts. Carol is executive vice president and chief philanthropy officer at the foundation. Rick was the vice president for communications.

These interviews reflected their deeply held belief that the act of giving and the ultimate power/use of that gift should never be separate. For example, when scholarships are given, both the recipient and the media receive background about why the donor established the scholarship fund. The foundation's newsletters and annual reports regularly feature donor stories. And donors give testimonials at the annual donor thank-you party.

But these interviews . . . wow. Donors responded incredibly well. As Rick noted, "Most people even if they deny it, really would like to believe that their gift lives. It's the salvation thing, just like Tom [Ahern] always says! . . . I've seen in their faces their joy that some – usually the first time ever – is sitting down and asking about their lives!"

What was the benefit to The Rhode Island Foundation? "We learned a lot about charitable giving from these interviews: why people give, the effect of their parents' model, and what happened to them personally that led to a desire to give."

But most important, "the interview has immediately catapulted our relationship to individuals to a very personal space. That distinguishes us in their minds (and ours) from every other 'financial' relationship, and often even their relationships with their favorite nonprofits."

Think about the transforming power of conversation.

Rick and Carol found that their donors share remarkable amounts of information during the interviews. Rick said, "I am continually surprised when I bump into folks I've interviewed at other venues, and they greet me like an old friend. For many, I am their emotional connection to the foundation. And a lot of our repeat business has come from our using the interview to move the relationship deeper and faster."

Rick shared the basic outline of these interviews—but reminds us all: "I listen for unexpected answers, lines of questioning that I should follow instead of marching along with my list of questions."

Interview Outline:

1. **Early chronological questions.** Finding out whether parents were a major factor in the interviewee's decision to "give back." Also finding out if there is a connection to "place," for example, Rhode Island.
   a. Asking about their parents. Their names, what kind of work they did, and how they came to be in Rhode Island
   b. Asking about their parents' charitable inclinations. Did they volunteer a lot? Was their faith important to them? Did they give money? Did they "model" charitable behavior for the interviewee? What would they think about the interviewee's decision to create an endowment?
   c. Asking about the interviewee's childhood. Was it happy or unhappy? Where did they grow up, and what was it like? If it was Rhode Island, what has changed since they were kids? Where did they attend school and how did that impact their life?
   d. Asking about first jobs or further education. Why did they choose a particular type of work or a particular major in school? How has their work impacted their life and why?
2. **Learning about their adult lives, work, and family and how they are intertwined.** If Rick is interviewing a couple, he interviews one person first up to the marriage, then he interviews the other person up to the marriage. Then he asks the couple about their life together. If there is a mate, Rick asks how the two met. He notes that this "usually lightens up the conversation since it's almost always a sweet story."
3. **Talking about charity.** When did you decide to make this gift and why? Why did you select the Rhode Island Foundation? What are the particular issues that you care about and why?
4. **And then Carol Asks, "How do you want to be remembered?**"

Envision the power of that question: How do you want to be remembered? Ask yourself: "I lived. I will die. In the interval, what difference did I make?"

Rick noted that most of his colleagues who conduct interviews just ask question #3, about the donor's charity. That's probably what most of us do. After all, the questions in this story take a lot of time to ask. And so do so many of the questions throughout this book.

But what a shame to ask only one question. What a loss to cut short the conversation.

That's fine for a testimonial quote or a brief story in a newsletter. But short conversations don't teach you the most. But the charity question alone will not strengthen the relationship between your donors and your organization.

Without the great background questions that Rick and Carol ask, you will not gain any real understanding about the motivations of a donor. Your organization will not understand the donor's emotions, interests, and aspirations.

Pay particular attention to this last thought that Rick shared:

These questions feel rather cool and superficial. I can only assure you that the interviewer's real curiosity, the sincerity with which Carol and I ask the questions, our sincere interest in the answers, our willingness to listen hard so that we follow strands of thoughts to their logical conclusions, are all essential to the interview and turn this into a fairly emotional experience. I'm always pretty drained by the end, and I think they are too. But it almost always ends with great appreciation on both sides and real warmth. So odd, yet so gratifying.

Surely this is a transformational experience. The donor is transformed by making his or her gift. The recipient organization is transformed by the donor's personal story.

But there was another transformation. We—Tom and Simone—were in that room being interviewed by Carol and Rick. It wasn't an interview. Not really. It was an authentic conversation. We were deepening the relationship between donor and organization and between genuinely caring individuals in the relationship. We disclosed the undisclosed. We shared emotions. It was draining. Tom and Simone were transformed again. We would like to think that Carol and Rick were, too."

In Conclusion

When Rick reviewed this chapter prior to publication, he sent me an e-mail responding to the implied question in my last sentence: "We would like to think that Carol and Rick were, too."

Rick said: "Yes, I was transformed. We had been colleagues until then; now we had shared."

Through authentic questioning and genuine curiosity, we create conversation. With candor and honest disclosure, we create intimacy in a relationship. By careful probing, we demonstrate caring for the interests and aspirations of others.'"(263-265)

Example: Online Engagement Creating Donor Impact-The CARE Package-Updated with a modern twist, the campaign demonstrates the future of online giving by offering significant donor choice and maximum transparency. Recycling and rebranding to strengthen a cause and appeal. "Virtual box" with shopping list of projects-partial gift-inviting family and friends and colleagues to add another virtual box. Donors can track progress online. Donor choice and remarkable transparency-donors are easily able to track the progress of the appeal and see how their gifts have helped to make a difference.

High Hopes Therapeutic Riding

"Adopt a Horse", $500-2,500 in annual appeal/unrestricted. Many individuals can adopt the same horse.

Five Note cards-donated by volunteers per adoption of this horse.

Personalized newsletter.

100 volunteers assist development director with cultivation and donor relations.

$1 Million approximate annual budget with 625 active volunteers and 25-50% of volunteers are donors.

Traditional New England Lobster Dinner Thank You Event-mainly volunteer driven, all components donated, with a vendor table option. l

The Donor Centric Pledge-We [fill in the name of your nonprofit organization here} believe…(1-23) 22. That the donor's perspective defines what is a "major gift". (A repeat donor of $25 annual gifts who suddenly increases her gift ten-fold to $250, for instance, is making a major commitment that deserves special acknowledgement.

It's time to tell loyal donors how much you appreciate them

The "recession that never ends" will celebrate its fourth birthday in December. And some of those donors have stuck by you the entire time. They kept giving, even when their income was uncertain, shrinking or stagnant. They mailed in their checks despite runaway gas prices and soaring grocery prices. They clicked to give online despite being bombarded with bad news day after day. You've been sending them receipts, annual reports and newsletters. But let's be honest — these people have shown an extraordinary level of commitment to your organization. How can you send a very special "thank you" to these incredibly loyal donors?

A letter 'just because'

A club that honors longevity-graduated levels and membership card
An invitation to a private phone interview

Something in the mail that matters

Don't Forget Your Board- Testimonials are one of the best types of stories for a nonprofit. For maximum donor impact, the board members should be telling the inspiring stories to donors. A woman, terrified of divorce, afraid and insecure, participates in a nonprofit's counseling, attends a few sessions through the organization's outreach sources and gains the knowledge, strength and perspective to undertake the often scary, unpleasant and serious business of ending a marriage. Because of the counseling she has received, she is ultimately able to begin a new and improved life. If she can attend a board meeting, or even write about her experience of how the organization made a direct improvement in her quality of life, the board hearing this story will be all the stronger for it. The, if all board members can relate this inspiring story to their own circle if friends and colleagues, they will indeed have a compelling story to tell. You give because of personal connections and stories you hear firsthand. Don't intimidate board members to ask for money but rather inspire and transform them into good storytellers with a wide audience **. (Board Members as StoryTellers by Susan Woodhall, July/August 2011 Advancing Philanthropy).**

23 min (40%) Career Professional Development

Career Advancement includes AFP benefits, professional development opportunities, the Fundamentals Course, CFRE, and asking the right questions at the interview.

Benefits of AFP and Chapter membership-3,000 members, 212 Chapters Worldwide

Cost: $300 annual fee, $250 + $50 Chapter Fee.

AFP Website

AFP Chapter Website
Action University, a new online professional development tool for AFP members. You can watch a 10-15 minute video summary of a best-selling business book or nonprofit book, accompanied by a workbook, a PDF summary, and in most cases a 45 minute webinar with the author where participants get to ask specific questions.

Monthly Breakfasts or Luncheon Speakers Cost: Annual prepaid Cost Discount
Chapter Scholarship Assistance, Chapter Mentor, Job Bank

2011 AFP Webinars/Audioconferences (Handout)

AFP Fundamentals of Fundraising Course

Annual AFP International Conference on Fundraising

AFP Leadership Academy

BoardSource membership provides you with the information you need to build a strong board and healthy organization. Members use our resources and services to find solutions, leadership tips, and knowledge about board-related issues. Individual Membership One Year $99.

The Fundraising School-The Center on Philanthropy at Indiana University: Principles and Techniques of Fundraising (five days and online) plus other courses, scholarships available, **www.philanthropy.iupi.edu**. Cost:

The Foundation Center Full-Day Classroom Training Courses : Foundation Funding Research: Strategies for Finding and Evaluating Prospects Learn to chart your organization's needs and find funders using *The Foundation Directory Online Professional,* the Foundation Center's top-tier online database of grantmakers. (1½ days) $295 **Grantseeker Training Institute** Five days of comprehensive training from the Foundation Center's experts. $795.

Basic Classroom Training Courses Free-**Guide to Resources on the Foundation Center's Web Site** Introduces the wide range of resources available on the Foundation Center's Web site and teaches how to navigate the site efficiently. **Introduction to *The Foundation Directory Online*** A hands-on introduction to the basics of searching the databases of *The Foundation Directory Online.* **Getting Started with *Foundation Grants to Individuals Online*** A hands-on introduction to effective use of the Center's online funding research tool for individual grant seekers. Also provides a weekly RFP update for free.

The Grant Professionals Association (formerly American Association of Grant Professionals-AAGP), a nonprofit membership association with about 1,600 members. Membership is open to any individual with an interest in and commitment to the grants profession. **Grant Professional Certification Institute** (GPCI) was formed as an affiliate organization to GPA for the purpose of overseeing the development of formal credentialing. Regular annual membership $175.

The Essentials of Fundraising Certificate Program

CT Association of AFP and Connecticut Association Non Profits Partnership

2010 Handout and Update for Offerings In CT For 2011

Consultant Websites

Why CFRE and Benefits-About 5,322 worldwide, average number of new CFRE's increased 18% and rate of recertification increased 10% on average. 68% female 92% Caucasian.

CFRE Review Course: AFP CT Chapter & Fairfield Chapter offered in 2008, 2009, 2010. Cancelled in 2010 but will be offered again in 2011. Two day session, $390 for members, $490 for non-members. Chapter scholarships available.

CFRE Certification Process: 225 questions, 200 scored, allowed four hours at test center to complete. 800 point maximum, 500 to pass. Fundamental baseline knowledge: Current &

Prospective Donor Research, Securing the Gift, Relationship Building, Volunteer Involvement, Management, Accountability. Cost $618 for participating organizations.

Continuing Education Credit and Approved Providers

ACFRE-lifetime certification.

Tips for Really Advancing Your Fundraising Career

Are you adequately compensated? 2011 AFP Compensation and Benefits Study-2010 average salary $76,193. Same in 2010 as in 2009. Top 255 of U.S. fundraisers $88,000 or more. Men continue to earn more than women despite 74% women in AFP vs. 26% men. Gap of about $20,000. The possession of a certification credential correlates with salary. In the U.S. CFRE's reported average salaries more than $25,000 higher than the average respondents with no certification. Those with ACFRE or FAHP reported salaries more than $50,000 higher than noncredentialed individuals.

Look Before You Leap

Asking the Right Questions During Your Interview about Support for Professional Development

Donor Bill of Rights, AFP Membership, PD activities, Certification, Board Minutes and Development Committee Minutes, Endowment size and growth, Annual Budgets, 990's, Donor Database size and Software.

Your Employer and Commitment to Professional Development and Certification

Job Security vs. Career Security

Recent years have seen an explosive growth in the number of fundraisers, with formal education, training and certification opportunities for people who enter the field. Professionals in fundraising do more than just raise money. They build institutions, nurture ideals, and improve and enrich the world. And fundraisers are increasingly in demand. According to U.S. News and World Report, fundraising is one of the top 25 hottest jobs for the future.

Reasons for Career Choice and Factors in Job Satisfaction

According to the *AFP Compensation and Benefits Report*, the top four fields or backgrounds from which fundraisers come to the profession are business, public relations/marketing, school/student, and education.

What makes people stay in their fundraising positions? A research study of turnover in the fundraising profession by Aleah Horstman found that the average length of tenure for participants in the study was 3.6 years. The study found seven key variables that can help predict fundraisers' intent to stay at their current jobs:

- Job satisfaction
- Commitment to mission
- Distributive justice, equity (i.e., rewards and promotions are perceived as equal for all employees)
- Promotional chances
- Job involvement
- Support of supervisor
- Search behavior (time spent looking for another job)

Respondents to *AFP's Compensation and Benefits Survey* cite the following factors that affect their job satisfaction:

- Alignment of their interests with the mission of the organization
- Relations with coworkers
- Variety of work
- Opportunities to apply one's skills and expertise
- Respect from community members
- Relations with volunteers
- Autonomy in doing their work

Asked about reasons for thinking about leaving their jobs, respondents to *AFP's Salary and Benefits Survey* say:

- They want to earn a higher salary.
- Their values and those of the organization are not the same.
- They are frustrated with the work environment.
- They want to engage in more interesting or challenging work.
- They have personality conflicts with their coworkers or manager.
- They want to more time to spend on personal/family activities.
- They want to move closer to family members.
- The work environment is not supportive.

Fundraising is definitely a transferable skill, if you're willing to learn the buzzwords and unique skill sets required for a particular nonprofit field or fundraising specialization.

You might begin your career working as a hospital development professional and then find a wonderful opportunity in a similar position in an arts agency. Or you might start your career as a prospect researcher and later find that you want to develop a specialization in planned giving. There are endless possibilities.

Education/Training

There are many ways to prepare yourself for a fundraising career, including higher education degree programs, certificate programs, professional workshops and conferences, and on-the-job training.

Degree programs in nonprofit management have proliferated in the last decade. Two professors from the Center for Public Service at Seton Hall University have compiled a web site that lists all the offerings in nonprofit management education at university-based programs. This is a great resource for locating a program near you. The web URL is **http://tltc.shu.edu/npo/**.

Continuing education programs provide excellent training in a more streamlined format. Examples are conferences and workshops provided by professional associations such as AFP, AHP, CASE and others. **AFP Professional Development Plan for Fundraisers** (available as printable **pdf** or interactive **word doc**) is a comprehensive map that details your career needs based on years of experience. The Plan is interactive - simply click on a product or course in the guide to learn more. The Fund Raising School at the Center on Philanthropy at Indiana University is another example of a continuing education program. Technical assistance and support centers, consulting firms, certificate programs at universities, and fellowships and internships are other ways to acquire non degree education and training. And web conferences and other online formats are becoming more commonplace.

In-house training may also be offered, especially if you work for a large, well-established nonprofit.

Questions to Ask Yourself in Planning Your Fundraising Career

Gail Freeman, a professional recruiter, suggests asking yourself 10 questions in planning for your career:

1. What are my accomplishments?

2. What do I like to do?

3. What do I do best?

4. What kind of fundraiser do I want to be? Researcher? Managing people? Special events planner? Planned giving? Major giving? Capital campaigns?

5. Where do I want to work? City/rural? Geographic area?

6. What size organization do I want to work for?

7. What type of organization do I want to work for? Cultural? Social services? What makes me passionate/motivated?

8. What are my personal considerations? Salary? Hours? Spouse's career? Do I want to travel?

9. What skills do I need to meet my career plan? Public speaking, writing, being with older people, supervising people?

10. What is my timetable for achieving my career goal?

Conducting an Annual Career Checkup

Some experts recommend conducting an annual career checkup. Ask yourself:

- Am I achieving my objectives?
- Have my objectives changed?
- Is this job meeting my expectations?
- Am I doing what I'm good at and enjoy doing?
- Is this job worth keeping?
- How can I best achieve career satisfaction either on this job or in another job or career?
- What other opportunities elsewhere might be better than this job?

Advancing in Your Fundraising Career: Advice from the Experts

1. It's critically important to develop and adhere to a **personal mission**. Successful fundraisers have in common a passion for their cause, a belief in the values of their organizations, a sense that it is the outcomes of fundraising that count, not the activity of fundraising. What are your motives and values? Do you find your work fulfilling?

2. When you're thinking about your career, don't think about the next job **but where you want to be in 10 years and how you are going to get there**. One of challenges you face as a development officer is to free yourself from draining day-to-day pressure and schedule some time for thinking and reflection. Develop a mini-strategic plan for yourself, including your vision

for your career, your personal mission, and objectives and action plans for achieving your personal career goals. What job experiences will you need? How will you get them? Starting now, what are the 3 most important things you can do this year to implement your plan? Talk with a personal mentor about your plans and how to achieve them.

3. **Take part in the CFRE and ACFRE credentialing process**. For starters, it forces you to be systematic about acquiring skills, and secondly, the credential demonstrates to potential employers your commitment to achieving the skills of the profession. The possession of a certification credential correlates positively with salary. The *AFP Compensation and Benefits Report* consistently indicates that CFREs and ACFREs report higher average salaries than respondents with no certification.

4. **Learn as much as you can from as many sources as possible**, including on-the-job training, courses, books, periodicals, and working with a mentor.

5. **Develop your own market niche.** What skills set you apart? Here are some examples:

Brings projects in on time and under budget; Communicates exceptionally with volunteers and board members ; Great command of new technologies; Good knowledge of planned giving; Team player .

Use self-tests such as Myers-Briggs to help you identify your skill sets and then cultivate these skills. Generalists are best equipped to move to another job, but it helps to have a specialty.

6. **Keep a file documenting your accomplishments**, including thank you notes you've received from people. This is critically important when it's time to search for your next position. It's also helpful when you complete the application for the CFRE or the ACFRE. Update your written resume twice a year - to help you think about what you've been doing and where you're going from here. Keep it simple. Name, rank, serial number - one page. This should be a chronological resume of where you've been and what you've done. Don't try to put all accomplishments in it.

Studies show that each resume gets reader time of about three seconds. Include your name and address, work and home phone numbers, college degrees. Save accomplishments for a separate page. The second page may not get read, and you stand the risk of your accomplishments being missed unless you emphasize them in some other way, such as in the cover letter.

7. **Network** -- even when you're not actively looking for a job. It's estimated that 50 percent of jobs are found through personal connections. Networking is the process of developing and maintaining quality relationships than enrich our lives and empower us to achieve our goals. It's about giving first and realizing that we can learn from everyone we meet. Andrea Nierenberg, in her book *Million Dollar Networking* recommends five simple steps for reaching out to people:

Meet new people and nurture your current network.

Listen and learn from everyone with whom you connect.

Make quality connections for others.

Follow up.

Stay in touch creatively. Andrea makes it a point to contact 9 people a day in her personal network, either by phone, email or a personal note.

8. **Practice interviewing**. It may not feel natural to brag about your professional accomplishments, but in an interview you will need to convey your strengths by providing specific examples. Develop a list of possible questions you might be asked and ask a friend or family member to do a practice interview and critique your responses. Prepare brief scripted answers to questions you may find difficult. Answer in a thoughtful, natural way - not defensively.

9. **Learn to negotiate**. Research compensation for similar positions in your field of work or community. Review salary surveys such as the annual *AFP Compensation and Benefits Report.* Know what you need (vacation, benefits, salary, training opportunities, consulting time 2-3 days a month) and practice asking for it with confidence and comfort. If salary requirements can't be met, be ready to substitute benefits. Be firm, but pleasant and professional.

Negotiating and Job Search

The annual *AFP Compensation and Benefits Report* consistently shows that women in fundraising are paid significantly lower salaries and bonuses than men. Typically, about 70 percent of male respondents in the United States say they negotiated successfully for their salaries, while only 60 percent of female respondents say they negotiated successfully. Taking time off to stay home and raise children or take care of family members or leaving a position to follow a spouse's relocated career are cited as contributing factors to lower earnings potential.

One individual observed, "Life is a long equation. Sometimes we must sacrifice in one area to get a benefit in another."

Authors of the book *Women Don't Ask* state that women do not negotiate their salaries when they start their careers, and the consequences last throughout their working lives.

According to professional recruiter Steve Ast, generally it's unrealistic to expect more than a 30 percent increase in salary when you move to a new position. There may be alternatives to salary in negotiating - vacation time, for example.

Another rule of thumb is that for every $10,000 in salary you can generally expect to search for one month. Thus, if you're looking for a high-paying position you should plan early and try to conduct the search while you're still employed.

Sticking Around for a While-Fundraisers apparently stay in post (on the job) just 18 months on average before moving on. “The secret of fundraising success is, you have to invest enough and you have to stick around long enough to ensure that your investment can reap its potential rewards”

Can’t implement major campaigns and help transformation and reward if you are only around for 18 months. Ex. Movie ‘Groundhog Day’-if after a short while, you are always returning to zero, there is never any real opportunity to properly get going, to find out what your day really could be.

Fund Development Success-brings you to Decision Making Table- that leads to prep for Executive Director-More than half of nonprofit executive directors will be leaving or retiring in the next decade.

My top four experts on topics for Professional Development: Burke, Hart, Ahern, Joyeaux

Leadership Opportunities

Paying Back

AFP Resources

AFP **Job Seeker's Toolkit**:
http://www.afpnet.org/ResourceCenter/content.cfm?ItemNumber=2908.

The **AFP Consultants and Resource Directory** contains executive search and recruitment agencies that can help you find a job that is just the right fit. **Click here to search the directory.**

The AFP Toolkit for New Fundraisers offers a broad overview of fundraising and puts the essential tools for getting started right at your fingertips. Whether you are new to the profession or just want to brush up on the basics, use this resource to get full benefit from AFP and start on the right foot in your new career!
http://www.afpnet.org/ResourceCenter/ArticleDetail.cfm?ItemNumber=4655.

The **AFP Virtual New Member Kit** lists online resources for new members:
http://www.afpnet.org/Audiences/MemberNewsDetail.cfm?ItemNumber=3326.

A Real Life Recent Job Search Experience by Holly Doherty-Lemoine, CFRE, Director of Development at Arts For Healing, New Canaan, CT. Arts for Healing is dedicated to providing creative arts therapy services and programs for people with special needs in Fairfield County, Connecticut. She is also the past president of the AFP Fairfield County Chapter.

5-10 minutes Questions and Answers

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