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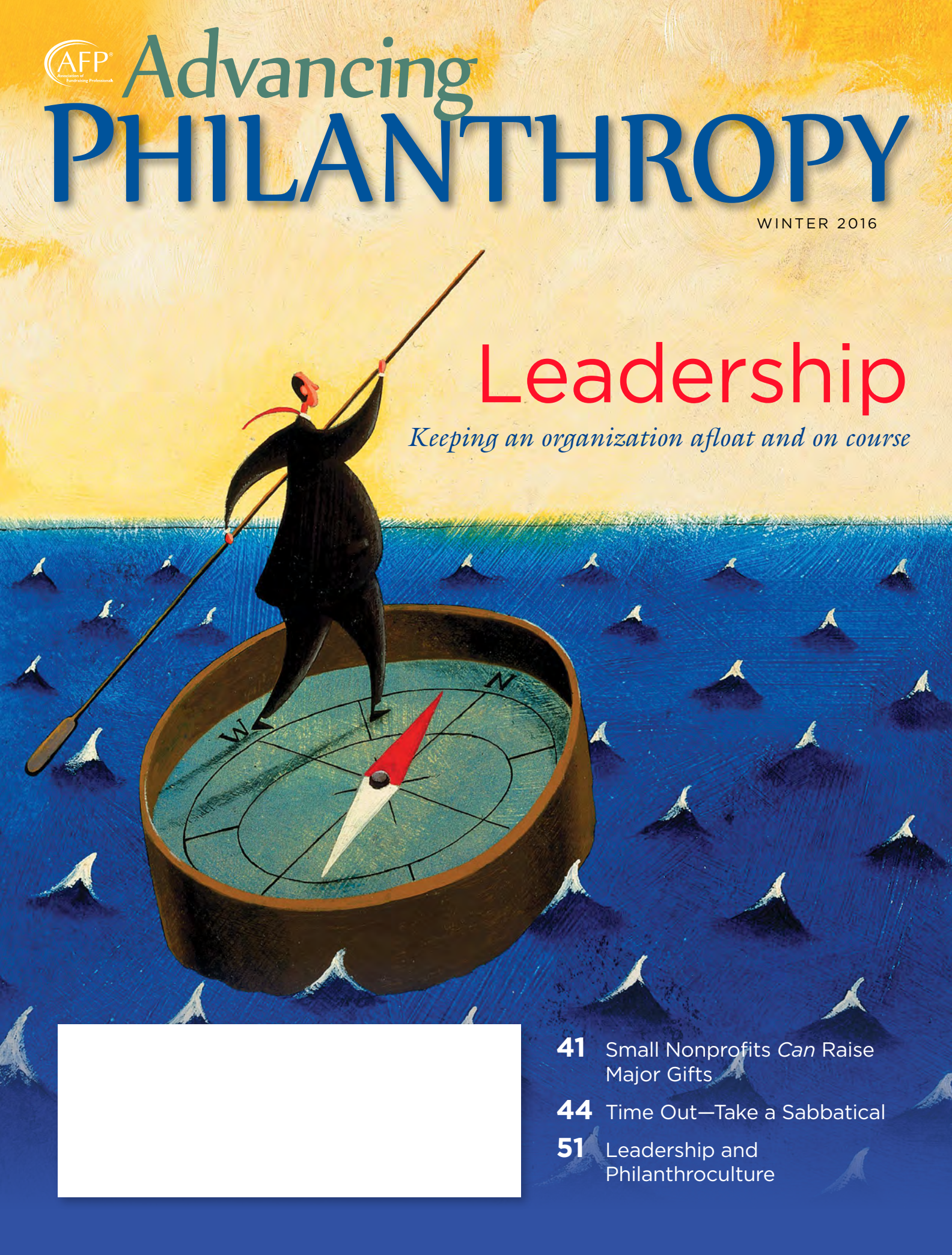
Advancing PHILANTHROPY

WINTER 2016



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PHILANTHROPY

WINTER 2016

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Marathon Methods

By Patrick J. Feeley, MBA, CFRE

Although I've always considered myself a runner, I had never completed a marathon. So, when I registered for the New York City Marathon, it was time to finally achieve a personal goal that had always eluded me.

I had trained for two marathons previously but hadn't been able to complete either one. So what was going to be different this time?

First, I broke my goal into the smallest steps possible. I started training by running once a week on Monday evenings for just 20 minutes. That's right. Just 20 minutes a week. It seems inadequate, but it created a strong foundation for what was to come next.

My weekly commitment eventually became routine. Then, I added a very short run each Wednesday followed by a long run on Saturday. I was persistent in getting out on the road to prepare.

However, just as in my previous tries, after one of my long runs, I had a slight injury. This time, I sought professional medical help.

Also, unlike my other attempts at running a marathon, for this race I joined a team in a charity slot and set about to raise $3,500 dollars for drug and alcohol addiction treatment at Caron Treatment Centers.

Now, if you're thinking there are some parallels between my marathon training and fundraising, you're right!

1. Big achievements start with one small step. What would happen if you simply added 20 minutes per week to review your top 10 prospects list for your campaign or fundraiser?

2. Help from others is required. How often do you ask for help? In your campaign, do you reach out to your board chair, your CEO or perhaps a consultant? What professional support can you seek out to keep you on track?

3. Passion is an essential ingredient. You have to believe in the outcome. You have to want this so much that it drives your daily behavior.

4. Commitment and persistence pay off. How can you invest more time in the essential activities that lead to success for your fundraising program? Is it possible for you to dedicate a longer stretch of time for donor cultivation and stewardship?

5. Failures and setbacks are key to success. A good campaign is filled with stretch goals that may cause a strain here or there. Ask for the big gift. Your prospects may need a little time to regroup but also may surprise you when they say "Yes!"

On Nov. 1, I showed up at the starting line for the New York City Marathon. And 26.2 miles and 5 hours and 33 minutes later, I crossed the finish line while helping our "Team Runwell" raise a record-breaking amount for Caron in the marathon. So, the next time you think a big fundraising goal is beyond reach, take one small step—perhaps just 20 minutes per week—to cross the finish line.

Patrick J. Feeley, MBA, CFRE, is executive vice president and chief development officer at Caron Treatment Centers (www.caron.org) in Wernersville, Pa.

AFP, an association of professionals throughout the world, advances philanthropy by enabling people and organizations to practice ethical and effective fundraising. The core activities through which AFP fulfills this mission include education, training, mentoring, research, credentialing and advocacy.

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As the Donors Churn

While gains in giving outpaced losses at charities in 2014, the number of donors fell, with less than half supporting the same organization two years in a row, according to the *2015 Fundraising Effectiveness Project (FEP) Survey Report*.

The FEP, developed by AFP and the Urban Institute (**www.urban.org**) in Washington, D.C., in conjunction with donor software providers, measures gains and losses in gift amounts and in the number of donors among participating charitable organizations.

Just 43 percent of donors who gave to participating survey organizations in 2013 gave to those same organizations in 2014. The average donor-retention figure over the past nine years is just 44 percent, with the highest rate (46 percent) occurring in 2005, before the Great Recession.

Despite donor "churn"—the inconsistency in supporting the same charitable organizations annually—charities saw gains in the levels of funds raised. For every $100 a charity gained over the 2013–2014 period—from new donors, the return of previous donors and increased giving from current donors—it lost $95 from lapsed donors and donors who reduced their prior-year level of giving, for a positive gain of $5.

However, nonprofits continued to lose slightly more donors than they gained. For every 100 new and returning donors, 103 departed without a gift, a net loss of three. Three of the past four years have seen negative donor losses (that is, charities losing more donors than they retained.)

The Great Recession in 2008 and 2009 had a significant impact on giving and donor levels. In 2007, the net giving level was +14—with charities losing just $86 for every $100 they gained—compared with a level of +5 in 2014. Donor levels were stronger before the Great Recession as well, with 2004 being the high mark. In 2004, charities lost 82 donors for every 100 they had or gained, while in 2014, charities lost 103 donors for every 100 they gained.

"In some ways, nonprofits are in a new world when it comes to post-recession giving levels and behavior," says Dr. Elizabeth Boris, founding director of the Center on Nonprofits and Philanthropy at the Urban Institute. "When the economy was strong, they worried less about retaining donors because new donors were easy to find. But it's far less expensive to retain existing donors than it is to identify and find new donors. The search for new donors is a costly burden for many charities."

The FEP also continues to show that larger charities are enjoying more success at their fundraising than their smaller counterparts. Organizations that raised $500,000 or more annually experienced a 10 percent net gain in giving in 2014. Meanwhile, charities raising between $100,000 and $500,000 had a net gain of 3 percent, and the smallest organizations (those raising less than $100,000) saw a net loss of 8 percent.

"The hard truth is that larger organizations find it easier to weather economic bad times and raise more funds than smaller charities," says Wil-

son "Bill" Levis, FEP project manager and affiliated scholar with the Urban Institute's Center on Nonprofits and Philanthropy. "While the difference was actually smaller in 2014 than it was in 2013, this is a trend that has continued for many years. The importance of fundraising staff and a well-known brand cannot be discounted. Smaller organizations can be successful, but it is tougher."

The FEP has developed the downloadable, Excel-based FEP Fundraising Fitness Test that allows nonprofits to measure and evaluate their fundraising programs against a set of more than 100 performance indicators by five donor-giving levels. In addition, seven GiG (Growth in Giving) reports provide concise yet informative pictures of fundraising gains and losses, growth in giving and attrition in a simple, reader-friendly format that executive staff and board members can understand. These tools and resources can be found at **http://afpfep.org**.

In 2006, the Urban Institute, the Association of Fundraising Professionals and a group of donor software providers designed a survey to measure gains and losses in gift amounts and in the number of donors among the firms' clients. The survey is based on a convenience sample of organizations that have given consent for their data to be used for this project.

The *2015 Fundraising Effectiveness Project Survey Report* received data from 8,025 respondents covering year-to-year fundraising results for the 2013–2014 period. Respondents raised more than $6.51 billion from about 6.74 million donors, for an average total annual giving per respondent of more than $833,000 and an average annual giving per donor of $1,151.

The full study, as well as a fact sheet, is available at **http://afpfep.org/reports**.

The Digital Donor

While online donors represent a small group—currently accounting for only about 10 percent of all dollars donated to nonprofit organizations, according to Network for Good's *2014 Digital Giving Index* (**www.networkforgood.com/digitalgivingindex**)—it seems that every nonprofit wants to acquire more of them. At least two beliefs appear to be feeding this collective frenzy: Online givers cost less to acquire than traditional mail donors and they also send larger gifts than traditional mail donors.

Are these individuals different from donors who make gifts in more traditional ways? More specifically, do their demographics and lifestyles differ from those of traditional donors? If so, can fundraisers use these "differences" to design more effective communications with them?

Online giving to Wheeler Mission Ministries (**wheelermission.org**) in Indianapolis had exploded between 2005 and 2014—increasing by more than 13 times. Why? Using behavioral data collected during that 10-year interval, a research firm was asked to develop donor profiles of Wheeler Mission Ministries' supporters who had already made an online gift and those donors who had never made an online gift to the organization. A random sample of 1,250 Web-only donors and 1,250 non-Web donors was generated, and demographic and giving attributes were also appended.

Several differences surfaced in the data when it came to the online group. Web donors are younger, with the median age of online donors being 50, with one-third falling between ages 31 and 45. They also live in more expensive homes, have larger incomes and are more likely to be college-educated (42 percent versus 29 percent for non-Web donors). Furthermore, Web donors' average first gifts ($80) were also twice as large as those from non-Web donors ($41).

Because a donor's first gift is the most predictive single indicator of long-term value, a second study was conducted to determine the long-term value of these new digital donors, which had two notable findings.

1. After five years, donors who gave initial gifts online and then continued to give online as well as by other means showed nearly the same retention rates as traditional direct-mail donors. They also provided the same number of average gifts. However, their lifetime value proved to be anywhere from $86 to $104 greater (per donor).

2. While the number of Web donors who give exclusively online diminished substantially after the first year of giving, their lifetime value was still substantially higher than traditional direct-mail donors, in many cases double or more.

Since the bulk of online gifts come during the fall fundraising season (September through December), it is clear that initial online gifts are heavily influenced by the high volume of direct mail reaching prospective donors during this time.

The research also revealed that those who made donations only through online channels repeated their gifts but at a substantially lower rate. This means organizations must not only bolster their acquisition programs, including email list building, but also their multichannel donor retention and cultivation initiatives.

To read an executive summary of the study, visit **www.brewerdirect.com/online-offline-donor-comparison**.

The Salvation Army and Indiana University Launch Human Needs Index

With more than 45 million Americans living in poverty, according to government measures, the new Human Needs Index (HNI) will serve as a powerful tool to track basic human need, with different indicators and less lag time than conventional government data. This multidimensional measure of human needs is based on objective data from The Salvation Army (**salvationarmyusa.org**) and prepared by the Indiana University Lilly Family School of Philanthropy (**philanthropy.iupui.edu**).

A standardized index, the HNI includes seven types of services representing basic human needs: meals provided, groceries, clothing, housing, furniture, medical assistance and help with energy bills. They were selected from more than 230 service variables consistently tracked across time and regions by The Salvation Army. The HNI aggregates these seven indicators at national and state levels, at monthly intervals, since 2004.

Until now, poverty generally has been tracked in three primary ways:

1. The official U.S. poverty rate is published by the Census Bureau every September. It reports on the previous year and draws on income figures as reported to the government.
2. The official U.S. unemployment rate is published each month by the Department of Labor's Bureau of Labor Statistics and covers the previous month. Its relation to the state of need is indirect, as it does not capture those who may be employed but still in need—the working poor.
3. The federal Supplemental Nutrition Assistance Program reports usage each month, with a three-month lag, but addresses just one aspect of basic human needs.

The HNI is a powerful complementary tool to these government measures because it draws on private, nonprofit data and focuses on the self-identified need for basic human services. It provides timely information such as monthly changes in those needs and reports on them quarterly, delivering immediacy and accessibility that other measurements lack.

The HNI provides both national and state metrics, revealing variances in need at the state level that may be due to factors such as seasonal differences, historical regional discrepancies or the effects of major disasters. For instance, researchers noticed a spike in requests for assistance with energy bills in April. That is because in many communities, it is illegal to shut off electricity during the winter months, so overdue energy bills come due in April. The data also show that natural disasters have an impact on needs in neighboring communities in addition to communities that are directly affected.

"Since the Great Recession, there is growing attention to poverty and vulnerability in the United States, which is still at high levels in some areas," says Una Osili, director of research for the Lilly Family School of Philanthropy. "The Salvation Army has a presence in communities across the country, urban and rural, and has historically collected very timely information on the provision of housing, food and many other aspects of human need, allowing the HNI to draw on data that has not previously been available."

For more information about the Human Needs Index and its methodology or to download the full report, please visit **HumanNeedsIndex.org**.

The 2015 AFP *State of the Sector*

What trends have affected fundraising and philanthropy over the past couple of years, and what should charities be focused on in 2016? AFP's first *State of the Sector* identifies key issues, provides insight from practitioners and nonprofit leaders and identifies important challenges for next year.

After providing a general overview of the nonprofit sector and the state of giving, the document looks at trends in five areas derived from a variety of studies, surveys and other research:

- Internal focus to find external success
- Fundraising: finding the right balance
- Retention through engagement and community
- Online communications and fundraising
- Public trust

At the end of the document, there is a checklist that suggests key goals and activities for the next 12 months, along with a list of the studies and surveys mentioned in the report so members can find more detailed information if they wish.

While the *State of the Sector* is meant to be comprehensive, it is also meant as a conversation starter for practitioners to talk about what they're seeing in their regions and what trends are affecting their organizations. The first version is mostly U.S.-based, though many of the strategies the document refers to are applicable in different communities. AFP will be creating a document emphasizing Canada, as well as a global fundraising piece, in the near future.

To read the full 2015 AFP *State of the Sector* report, visit **www.afpnet.org/files/AFPStateoftheSector2015.pdf**.

Nonprofits Failing to Engage Donors and Other Constituents Through Social Media

Most U.S. nonprofits fail to maximize the use of social media to build relationships with their donors and other constituents, according to the *Nonprofit Social Media Scorecard,* a national study (conducted Sept. 20–Oct. 15, 2014) by Dunham+Company and Marketing Support Network.

All of the 161 nonprofits studied were on Facebook. Eighty-five percent of them were on Twitter, but only 58 percent of them linked to Facebook and 55 percent linked to Twitter from their home page. The 161 nonprofits selected for the study were chosen with an emphasis on variety in type, size and religious ties.

"While the overwhelming majority of organizations are on social media and do a good job of posting regularly, very few use these channels to genuinely engage with their constituents," says Rick Dunham, president and CEO of Dunham+Company. "Charities generally use social media channels to advertise events or as a 'billboard,' but rarely do they use them as a way to engage donors in conversation."

Each organization was studied in the following areas:

- Response time to general inquiries over social media channels
- Integration between website and social channels for sharing

- Response time to posts about donations over social media channels

Nonprofits lagged significantly behind for-profit organizations in responding to general inquiries. Of the nonprofits surveyed, only 51 percent took the time to respond to questions on Facebook, and only 45 percent responded on Twitter. A 2013 survey by Conversocial found that 81 percent of for-profit organizations responded on Twitter and 80 percent responded on Facebook. And on Twitter, for example, businesses responded to questions in an average of 11 hours, 15 minutes, compared with 15 hours, 12 minutes for nonprofits.

Surprisingly, nonprofits are better at responding to general questions than they are to questions after donations. Only 9 percent of those studied responded to post-donation questions on Facebook, and only 29 percent responded on Twitter.

In addition, only 24 percent of the nonprofits studied have links set up to give donors an opportunity to share their good feelings about the organization via social media channels, even though a study by the Red Cross has shown that 40 percent of donors would share or would be likely to share on social media about a donation they made.

For more information on the study, visit **www.dunhamandcompany.com/social-media-scorecard**.

Fundraising and Finance—Worlds Apart?

Finance and accounting at a nonprofit organization have many different layers of complexity and nuance not often found in the for-profit world. Many of the finance and accounting professionals at nonprofits face some unique challenges and are very involved across the board in their respective organizations. At the same time, there is a concerted move to small, lean finance teams across organizations of all sizes. In other words, there is significant expectation to do more with less without a drop in quality when it comes to reporting on and managing multiple funding sources.

Those are just some of the trends found in the *Nonprofit Finance & Accounting Study: Trends and Challenges Facing Nonprofit Finance Professionals*. Other findings include:

Interruptions are common. The No. 1 most common challenge finance/accounting professionals say they face on a daily basis is interruption from other departments (nearly half of all respondents), followed by reporting challenges and training new employees.

Nobody is above the basics. While many of the respondents hold senior-level positions, nearly all of them continue to be involved in the day-to-day activities of the organization. This is reflective of a trend found in the data that nonprofits (both large and small) are moving to smaller, leaner finance teams.

Funding is (obviously) critical. Organizationally, finance/accounting professionals identify long-term sustainability and finding new funding sources as the biggest challenges. (This is true for both

small and large organizations.) Most organizations are looking to increase funding sources in the next three years.

Embracing the cloud. Larger organizations are moving to the cloud faster and see greater value and benefit to cloud-based software. Overall, most of the respondents see the cloud as beneficial, although security is the greatest area of concern.

Finance/accounting professionals want to focus more on strategy. By and large, respondents spend much of their time focused on either running reports or preparing for monthly presentations (regardless of role, age or organization size) and would like to spend more time on strategic and budget planning.

Involvement across the organization. Overall, respondents say they are actively involved in decision making across the entire organization, not just within the finance department. Many play active roles in operations and human resources as well. However, the department with which they are the second-least involved is fundraising/development.

"There appears to be a missed opportunity or missed connection between the finance and fundraising departments," says Erika McNichol, director of product marketing at Abila and co-author of the study. "Closer collaboration between the two departments will likely increase finance's strategic involvement in the organization, as well as a clearer vision of how, when and where dollars are used to fulfill the mission."

To download the full report, visit **www.abila.com/financestudy**. And to learn more about the connection between the finance and fundraising departments, plan to attend the next AFP/Rice University Development and Finance Symposium in Houston. Watch for details soon!

The Fellowship in Inclusion and Philanthropy Program

By Sahar Vermezyari

A few months ago, the AFP Foundation for Philanthropy–Canada launched a first-of-its-kind program in Ontario, the Fellowship in Inclusion and Philanthropy Program (**www.afpinclusivegiving.ca**). This program was developed as a result of some pointed questions being asked in regard to the fundraising profession and cultural diversity: Who is missing from the picture? What would enrich the work further?

A series of conferences held with several communities told AFP that the fundraising profession needs to better reflect the communities we serve, to create more opportunities for underrepresented groups and to expand our understanding of fundraising best practices.

These principles have formed the cornerstones of the new fellowship program. With funding from the Ministry of Citizenship and Immigration's Partnership Project Office (**www.citizenship.gov.on.ca/english/pp/grants.shtml**), the fellowship program offers inclusion-oriented education, specialized training, networking activities and one-on-one mentorship for 35 Ontario-based emerging and mid-level nonprofit professionals representing a wide range of diverse identities and interests.

A Team Effort

I am very proud to be the program manager for this new, groundbreaking program. I work with a group of dedicated senior volunteers as well as a supportive AFP staff team to lead this exciting program: Hamlin Grange; Victoria Grant; Lori Gusdorf, CAE; Nancy Horvath; Emma Lewzey, CFRE, co-chair; Tania Little, CFRE; and Krishan Mehta, co-chair.

The response we have received from our funding supporter, Ontario chapters, senior AFP volunteers and the general fundraising sector has been incredible.

When I attended Fundraising Day in Toronto last May, I was lucky enough to meet many people who shared their experiences with me and echoed what we had been thinking and hearing all along: A program such as the Fellowship in Inclusion and Philanthropy is greatly needed and will make a considerable impact in the social profit sector.

Meet the Fellows

Throughout the spring of 2015, we were able to widely promote the program, and we received an incredible 48 applications. The applicants came from diverse backgrounds, but they all shared a passion for philanthropy and a desire to further their understanding of diversity and gain strategies for improving inclusion. Through a very competitive process and with the help of a volunteer selection committee, we selected more than 30 fellows and have extended the fellowship to those individuals (see sidebar).

The program offers many opportunities to which the fellows otherwise might not have access. Over the course of eight months, each fellow receives the following:

- Complimentary one-year membership from AFP
- Full scholarships to six AFP professional development and education opportunities, including the Fundraising Day conference, the three-day Fundraising Congress, the Fundamentals of Fundraising course and three webinars
- Full scholarship to customized diversity and inclusion sessions
- One-on-one, senior-level mentorship
- Opportunity to develop organizational policies and practices on diversity and inclusion
- Support from the program manager throughout the fellowship
- A Certificate of Inclusive Leadership from AFP upon completion of the program

The Fellowship in Inclusion and Philanthropy Program is the AFP Foundation for Philanthropy–Canada's leadership initiative, and it will further develop the fundraising landscape by building a pipeline of leaders that reflects the diversity of our communities in Ontario.

LEON ZEMITSKY/ILLUSTRATION SOURCE

We are excited to see where this program takes us, the lessons we will learn and the impact it will have on the social profit sector. We are pleased to be able to run this program for two consecutive years and will give other 30-plus fellows this same opportunity. For the next cohort, the deadline for completed applications is **5 p.m. on Friday, March 4, 2016**. Please follow our journey and become a part of the program by visiting our Web page and signing up for our email updates. You also can read guest blog posts by our current fellows at Stories from the Field (**www.afpinclusivegiving.ca/stories-from-the-field**). Follow us on social media: Like us (Inclusive Giving) on Facebook, and follow us on Twitter @InclusiveGiving.

If you would like to become a mentor to a program fellow or have any additional information, please contact me at **diversityfellowship@afpnet.org**.

Sahar Vermezyari oversees the development and execution of all aspects of the Fellowship in Inclusion and Philanthropy Program.

Trailblazers

The individuals who will blaze a trail in the Fellowship in Inclusion and Philanthropy Program are passionate, thoughtful, determined and community-minded. I want to take this opportunity to once again congratulate the 2015 Inclusion and Philanthropy Fellows:

Alana Liberman
Alisha Pawa
Andrea Thompson
Angela Severight
Charlie Andrews
Cheryl Blackman
Deona D'Sa
Dolly Singh
Dulaa Osman
Elizabeta Liguric
Eugenia Duodu
Frankie Chow
Hope Lovell
Irshad Osman
Jacqui Terry
Lorena Munez
Lucia Ly
Mam Joof
Melodie Gabriel
Mimosa Kabir
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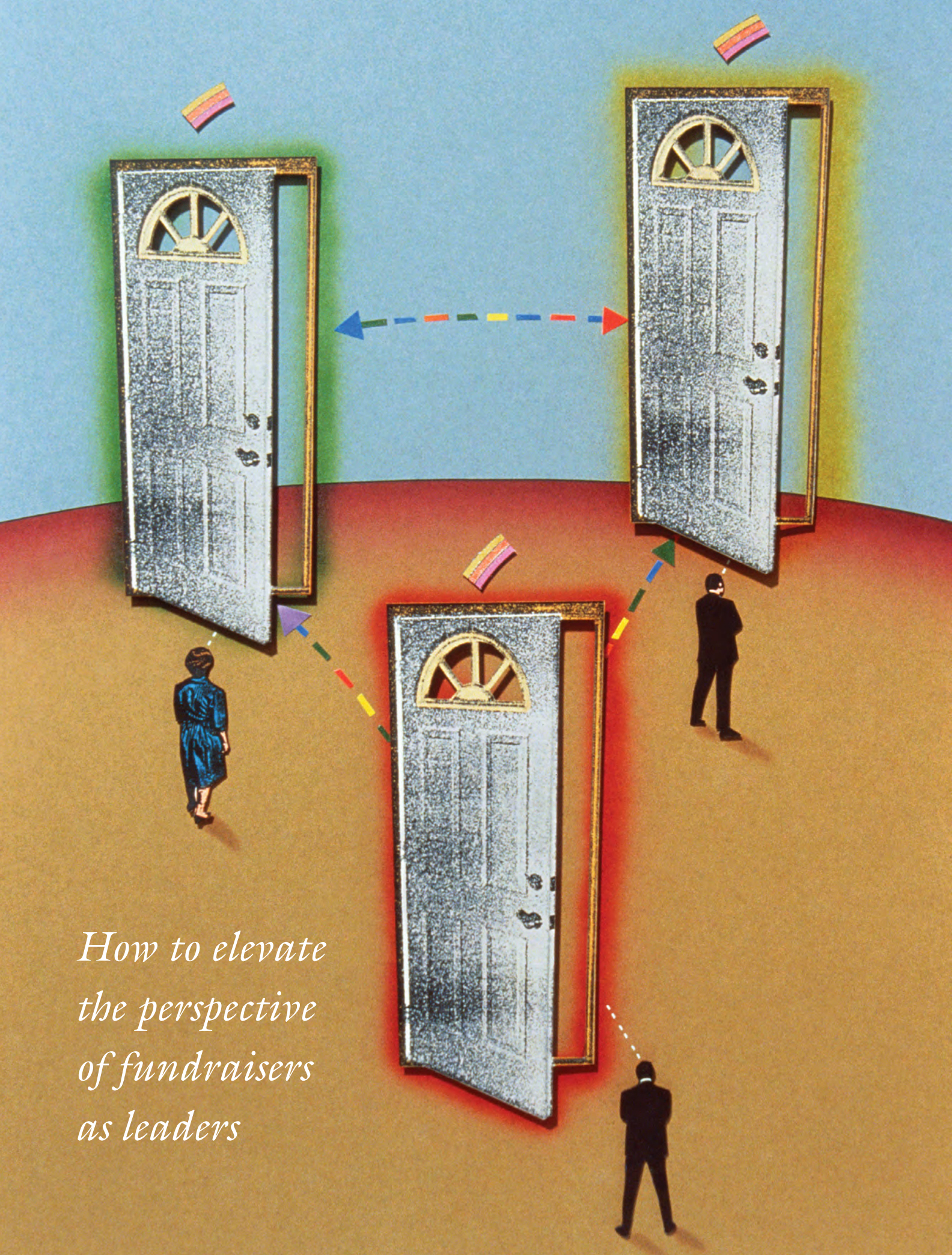
Salomeh Ahmadi
Sara Lebensold
Sarah Midanik
Shehzad Qureshi
Tania Cheng
Tania Hossain
Toni Francis
Uma Venkataramaiah
Winsome Smith

Also visit **www.afpinclusivegiving.ca/meet-the-fellows**.



How to elevate the perspective of fundraisers as leaders

LEADERSHIP

A Position or Proposition?

By Karla A. Williams, M.A., ACFRE

The best fundraisers are leaders in the truest sense. Their leadership does not come from a position of power, however. It comes from a value proposition that their missions matter and merit investment.

The Concept of Leadership

- **Position:** the place where someone is in relation to other people
- **Proposition:** something that someone intends to do or deal with

The concept of leadership has evolved and matured over time. Today, there is general consensus that iconic leadership is out and participative leadership is in. This means more people will share in the work of leadership: leadership per se is no longer the sole purview of the person at the top. In essence, leadership is not just positional; it is propositional. Finally, it is possible to say with some authority that leadership is a behavior, not a title.

Leveling the hierarchical structure of organizational dynamics is beneficial to all nonprofit professionals, but it is especially fortuitous for fundraisers who have struggled for decades to be leaders when their job description does not say so. Fundraisers have always asked, "How can I be a leader when I am not in a leadership position?"

The good news is, when organizations hire fundraising professionals today, they expect them to act like leaders on behalf of their organizations. Permission given, at least figuratively.

Fundraising professionals do have the opportunity to be leaders in their own right and in their own way. Their leadership *space* is contextually "within," and their leadership stance is directionally "for" their organizations.

Within: Fundraisers lead from within the organization.

- Fundraisers do not lead from the top or the bottom. They lead from the middle, or *within*. The very nature of their work takes them into the nooks and crannies of their organizations as they uncover mission moments, messages and elements so they can construct the "why" for philanthropic support. This internal kind of leadership is almost without space limitations. It forges tactical connections and stimulates strategic discussions with administrative leaders, program experts, frontline staff and clients.

RICHARD SCHNEIDER/GETTY IMAGES

For: Fundraisers lead for the organization.

- A fundraiser's job does not stop in the middle or stay within. It extends upward and outward *for* the organization. As leaders, fundraisers take the "why" they uncovered from inside the organization to build out the "how" outside their organizations. By engaging board members, high-level donors, community leaders and a diverse group of supporters, fundraisers inspire others to be advocates and ambassadors for the cause. This external work requires tactical communications and strategic relations, tailored for each and every situation.

In essence, fundraisers lead by navigating a complex landscape, replete with twists and turns, intentionally and artfully creating a community of followers and contributors of time, talent and treasure. Some would say that fundraisers have one of the most important "positions" within their organizations because they are the connectors with virtually everyone, everywhere and in every way. I like to think of fundraising as an opportunity to weave the threads in the fabric of what we call community, from within to for.

Looking at fundraising this way, it becomes obvious that fundraising is not really a job or a position. It is an auspicious calling or proposition. Fundraisers lead by inspiring followers for their missions, not themselves.

Defining the Role of Fundraiser as Leader

Exploring the subject of leadership is really quite daunting. Talking about leadership feels endlessly circular. Thinking about becoming a leader can be rather

THE SIX LEADERSHIP VALUE PROPOSITIONS FOR FUNDRAISING PROFESSIONALS

intimidating. If you are a fundraiser, however, your role as leader is downright exhilarating and exhausting.

Leadership is dynamic, not didactic. Even leaders in the field have trouble making a definitive list of the desired characteristics of leaders. Thus, it may be easier to wrap your heads around how a fundraiser leader behaves rather than listing characteristics and attributes. They say leaders are ultimately judged by what they do, not by what they say or propose to do. In essence, a leader is measured by what was left behind. However, leadership starts with what someone brings to the table. The best fundraising leaders come with a certain attitude, a set of values, a life perspective and a moral compass that naturally puts them on a leadership journey.

Fundraisers who are leaders have a strong desire to make the world a better place and a deep interest in connecting people with their values. They are big-picture visionaries and mission-focused strategists. They seldom look for a job. They seek a cause. They are devoted to their organizations and go beyond the call of duty to safeguard their missions. Fundraisers who are leaders serve by example, motivate others to action, exercise influence and attract followers to their organizations' missions.

Leaders are those who embrace the dual concept of fundraising: both a calling (ministry) and a career (business). They have inherent abilities to communicate on many levels. They think strategically and tactically.

Research about successful fundraising leaders suggests that they are the ones with an intense desire to make the world better and help others fulfill their philanthropic journeys. Their focus is less on themselves and more on others.

In short, fundraiser leaders seem to exhibit the following behaviors, which are their value propositions:

1. The Expert (in fundraising)
2. The Facilitator (of values)
3. The Catalyst (of impact)
4. The Conscience (of mission)
5. The Advocate (for philanthropy)
6. The Steward (of resources)

What is a value proposition? It is a promise of value to be delivered and acknowledged. A value proposition explains what benefit you provide for whom, how you do it uniquely well and why you are distinctly better than the alternatives. It helps explain why you are a fundraiser who is a leader.

Be the EXPERT in Fundraising

Fundraisers who are leaders first master their craft. Technical knowledge is their core competency. Not only do they comprehend fundraising theory, principles and techniques, but they also can interpret and align them to fit the type of organization and meet the needs of their

Fundraiser or Leader?

Many years ago, after accepting a new position, I carefully reviewed my job description to be sure I fully understood my roles and responsibilities. Three pages described my duties, which were primarily to raise money, manage staff and work with board members. On those pages, there were elaborate details about the technical aspects of the fundraising program, but there was not a single reference to "leadership." I found this oddly coincidental, since fundraising was being touted as a bona fide profession. Didn't that mean that fundraisers were more than "management"? After several months, I began to question the logic and legitimacy of my job description. It seemed so technical. It did not reflect the strategic and dynamic organizational elements that gave purpose to those techniques.

I attempted to illustrate those elements. My first draft did not have words or descriptions. It had only a large circular graphic with arrows that showed intersections between internal and external constituents. Later on, I gave my graphic some descriptive terms—Catalyst, Facilitator, Advocate, Conscience and Steward—and then included it in my first book, *Donor Focused Strategies for Annual Giving.*

Although my graphic version never officially replaced the organizational, human resources job description, it served to remind me "why" my job was to be a leader and not merely a technical manager. It was then that I discovered that leadership qualities and technical skills were simply two sides of the same coin. That is when leadership became my proposition—a way of describing how my position influenced a way of thinking, a way of speaking and a way of doing fundraising. It was much better than that three-page job description I was hired for!

Fundraisers who are leaders facilitate the philanthropic process. They **connect values with visions, ideals with ideas, aspirations with resources and problems with solutions**.

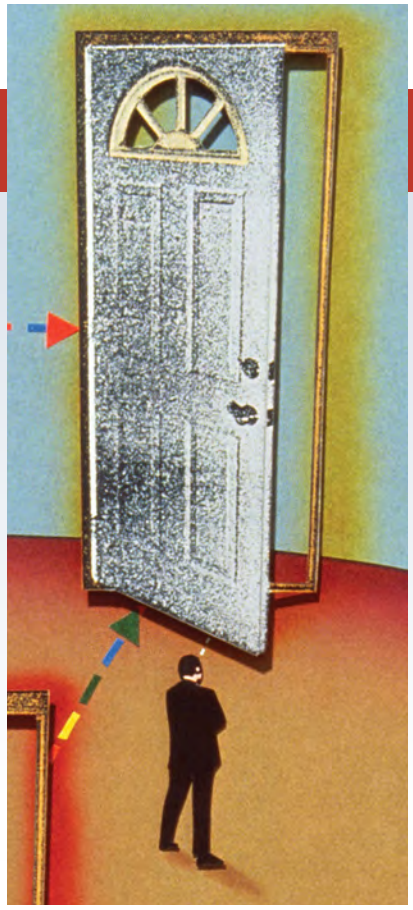
unique constituencies. As experts, their field knowledge and applied wisdom are time-tested, elevating their strategic thinking skills and problem-solving abilities.

As true professionals, they continuously seek new knowledge so they can hone their expertise. They are curious about what is going on from every vantage point. They comprehend the why, what, when and "so what" of donor behavior, case development, research and planning, relationship building and the implementation of an integrated development program. They are well-versed in how and when to use acquisition, renewal and upgrade techniques that result in a sustainable base of support. They also know what does not work and constantly evaluate fundraising performance using the latest technology and metrics.

They are agile and inventive enough to turn on a dime to increase performance or to respond to the latest environmental influences. Their competencies are in line with the Association of Fundraising Professionals' published standards. They are lifelong learners and participants in their profession. They contribute to the advancement of philanthropy across various sectors and cultures.

Be the FACILITATOR of Values

Fundraisers who are leaders facilitate the philanthropic process. They connect values with visions, ideals with ideas, aspirations with resources and problems with solutions. They facilitate discussions, stimulate dialogue and encourage discovery around purpose and meaning.



Can You Learn Leadership?

According to Lilya Wagner, Ed.D., CFRE, author of *Leading Up: Transformational Leadership for Fundraisers* (Wiley, 2005), professional fundraisers learn the art of leading up by listening, analyzing and influencing. In other words, they are on their own, carving examples of great leadership, seeking opportunities to learn and grow and hoping for that moment in time when someone will notice their inherent qualities.

Frankly, very few nonprofit organizations have a formal leadership development program, which means most fundraisers must take responsibility for their own career development. This is an endemic shortcoming in the nonprofit sector, for which we are paying the price.

For those who aspire to be leaders, in spite of the lack of formal advancement, there is the "over-and-above" rule of professionalism: Go above and beyond to search out new responsibilities, volunteer to head up a project, connect with top leaders, seek input, think big, offer to assist a program director and become widely informed. This will enable you to expand your network while extending your influence.

Of course, there is a last resort: Move up by moving on.

They act as the middle person between dilemmas and dreams. They introduce people to people, and they align similarities with differences.

As leaders, they help organizations adopt philanthropic values and philosophies, build donor-responsive systems and incorporate strategies necessary to attract and retain philanthropic support, now and in the future.

They uphold that philanthropy begins with the donors, who may need to be educated about how to give. They encourage donors to make decisions that fulfill their own aspirations and not to be influenced to contribute to something less meaningful. They are receptive to donors' unique motivations, their giving preferences, their need for recognition and their desire to be involved.

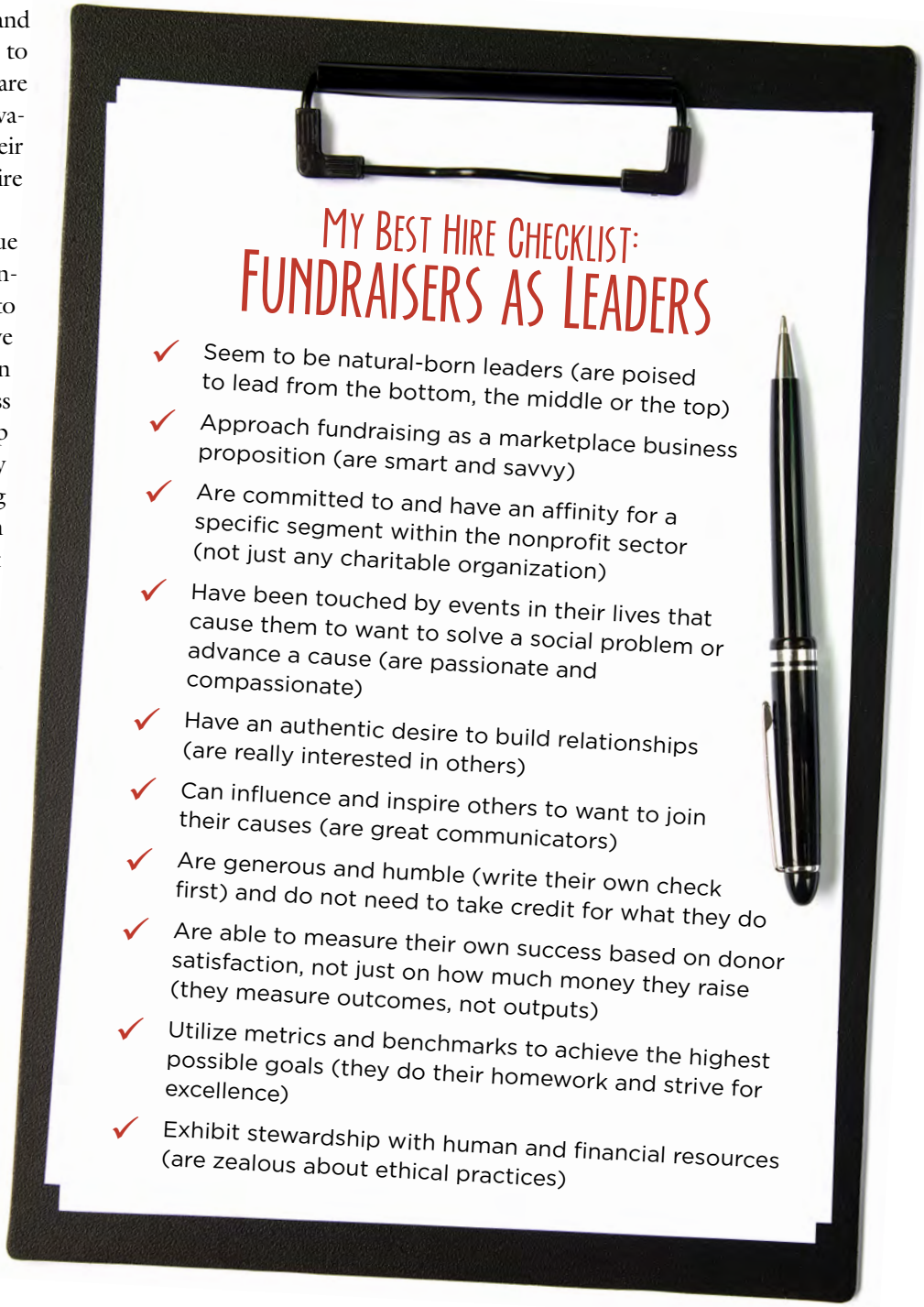
Fundraisers who are leaders value the importance of teaching philanthropy rather than just leaving it to chance. They teach up (to executive directors and board members), down (to volunteers and staff) and across (to program directors and leadership team members). Teamwork, they know, is the basic tenet of a strong fundraising program. They coach and lead others to bring out the best in them.

Be the CATALYST of Impact

Philanthropic fundraisers articulate the vision of the institution and serve as change agents for social good. They are both courageous and tenacious. They know the difference between outputs and outcomes. Their ultimate goal is to achieve impact, which means something changed and is indeed better.

Fundraisers who are leaders have an acute awareness of the complex external environment of donor motivations, marketing and messaging. They know how to build relationships that are based on intention, information and inspiration. They help others catch the vision and plan and lead the action because they are results-oriented and have a moral compass.

They have limitless energy in pursuing dreams, inspiring others to action and knowing when to lead and when to follow. They build mutuality while pushing for the highest possible attainment yet understand and resist the obvious risk of becoming self-serving.



Fundraisers stand at the critical intersection between their organizations and the communities they serve.

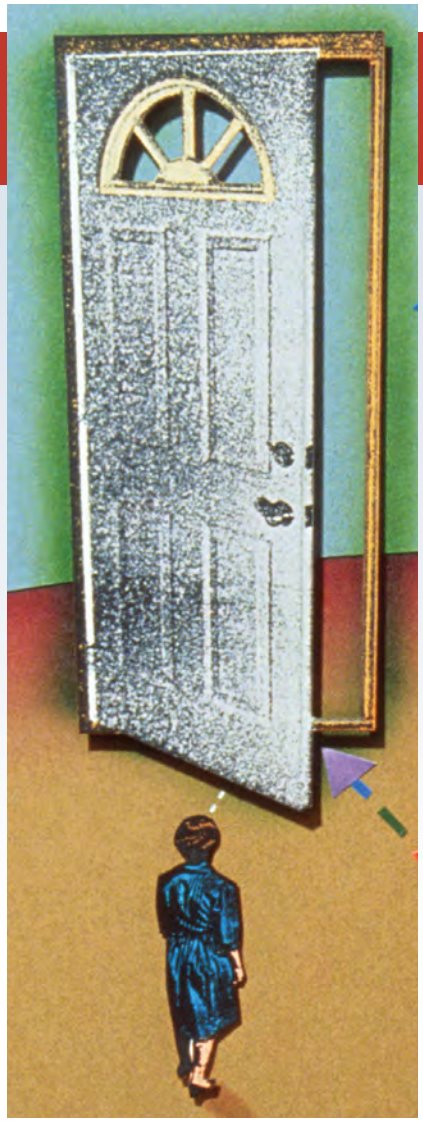
As leaders, they are the voices of both their donors and their organization's recipients. This means that they carry messages of concern and praise. They transmit critical questions and give well-informed answers. They understand the complexity of meeting human needs and accept the resultant successes, as well as the disappointments.

Be the CONSCIENCE of Mission

Fundraisers stand at the critical intersection between their organizations and the communities they serve. This delicate proposition requires balancing the competing and sometimes conflicting demands and expectations of staff, colleagues, volunteers, trustees and donors. They serve as an organization's charitable conscience.

They are passionate and compassionate. They are socially conscious—demanding that the constituent, the student or the patient comes first, no matter what. They do everything in their power to ensure that their organizations are effective in their reach and for their recipients.

In all they do, the best fundraisers are ethical above reproach. They follow the strictest interpretation of the



On "the Leadership Team" or a "Fundraiser"?

The other day, I asked a group of AFP members if they preferred to say they were "fundraisers" or "members of the leadership team." Most said the latter.

This is not surprising, actually. It seems as though the word "fundraiser" is less than and the word "leader" is more than.

The debate is not new, and it will continue until we as a profession own our words and our actions. And until we in the nonprofit sector earn the public's trust. Like it or not, it is our responsibility as fundraising leaders to defend our titles, our positions, our purposes and our nonprofit sector. We must accept responsibility for the shifts in values, behaviors and terminology that undermine the sector's integrity. As representatives of the philanthropic sector, we fundraisers deserve the severest criticism when we talk about our bottom lines instead of the impact on the people we serve, when we use language like CRMs and LYBUNTS, when we raise money for problems instead of solutions, when we put our institutional needs ahead of our donors' needs or when we become professional technocrats who know more about planning giving instruments than the complexities of philanthropic motivations.

As philanthropic fundraisers, it is our role to help clarify our own issues—to be good and to do good. We must defend all aspects of the philanthropic sector in order to strengthen it. We must espouse its virtues and remedy its shortcomings with energy, courage, intelligence and passion. We may start by asking ourselves whether the title of "fundraiser" serves us well or whether it limits our impact and ability to lead from within and *for* our organizations and our sector—and whether that word advances philanthropy as a way of life.

profession's code of ethics and take no action that would undermine the credibility of their organizations or of philanthropy itself.

They love raising money for their missions. They love to educate and challenge others to raise money for their missions. They love to represent their organizations or the institutions where they work. They get excited about the very concept of sharing an opportunity with a donor to invest in the quality of their communities.

The best fundraisers practice philanthropy in their personal affairs and encourage others to give and to volunteer their time to deserving causes, not just their own.

Be the ADVOCATE for Philanthropy

Philanthropic fundraisers are the voices for their causes in the communities, all rhetoric aside. They know the issues intimately, so they can speak about them without resorting to annual reports, brochures or telephone scripts. Whatever the issue—children, disease, shelter, education, culture, the environment, etc.—they live and breathe it.

As leaders, they are vigilant about helping program staff to articulate their dreams in ways that bring the case to life. While endorsing a program, they help develop the printed business plan or the articulated rationale so that others can invest in ways that benefit the community. They advocate for service excellence because that is what recipients deserve and donors expect. When services are insufficient or lacking, they use their voices to trigger their institutions' conscience.

When they speak, they do so with informed opinions, and the concerns and desires of their donors are balanced by the needs and interests of the recipients. They speak out with patience and understanding, with gentleness and advocacy and with emotion and intelligence.

Fundraisers who are leaders are the voice of the profession as well. They know that their profession is one without competition. It is a vocation of collaboration. They serve as role models and mentors. Through their enthusiasm and commitment, they encourage talented colleagues to enter the profession and provide them with support and guidance. They share their achievements as well as their mishaps. They give away what they have learned, and they continue to grow.

Be the STEWARD of Resources

As frontline recipients of philanthropic gifts, the best fundraisers recognize the responsibility of stewardship. It is their responsibility not only to accept a gift in a meaningful way but also to regard these funds as their own (figuratively): managing them prudently, investing them wisely and expending them judiciously.

As leaders, they not only take their job very seriously, but they also see it as moral action. Accountability begins when they make a case for support that spells out realistic goals and objectives that make later accountability possible.

As leaders, they know that a philanthropic culture is essential in their organizations because it creates an environment where fundraising is respected and shared. They build relationships that result in the formation of philanthropists (of all financial means) as opposed to getting a big number of short-term donors. Their programs perpetuate the philanthropic tradition and nurture the spirit of giving and receiving.

Karla A. Williams, M.A., ACFRE, is principal of The Williams Group in Charlotte, N.C. (http://karlawilliams.com), and author of Leading the Fundraising Charge: The Role of the Nonprofit Executive *(Wiley, 2013) and* Donor Focused Strategies for Annual Giving *(Aspen, 1997).*

Additional Reading

Cultivating Nonprofit Leadership: A (Missed?) Philanthropic Opportunity by Niki Jagpal and Ryan Schlegel, National Committee for Responsive Philanthropy
www.ncrp.org

Daring to Lead by Marla Cornelius, CompassPoint Nonprofit Services
http://daringtolead.org

Donor Focused Strategies for Annual Giving by Karla A. Williams, M.A., ACFRE (Aspen, 1997), paperback, 304 pages

Leading the Fundraising Charge: The Role of the Nonprofit Executive by Karla A. Williams, M.A., ACFRE (Wiley, 2013), hardcover, 262 pages

Leading Up: Transformational Leadership for Fundraisers by Lilya Wagner, Ed.D., CFRE (Wiley, 2005), hardcover, 192 pages

Leading With Intent, BoardSource
http://leadingwithintent.org

"The Nonprofit Leadership Development Deficit" by Libbie Landles-Cobb, Kirk Cramer and Katie Smith Milway, The Bridgespan Group
http://ssir.org/articles/entry/the_nonprofit_leadership_development_deficit

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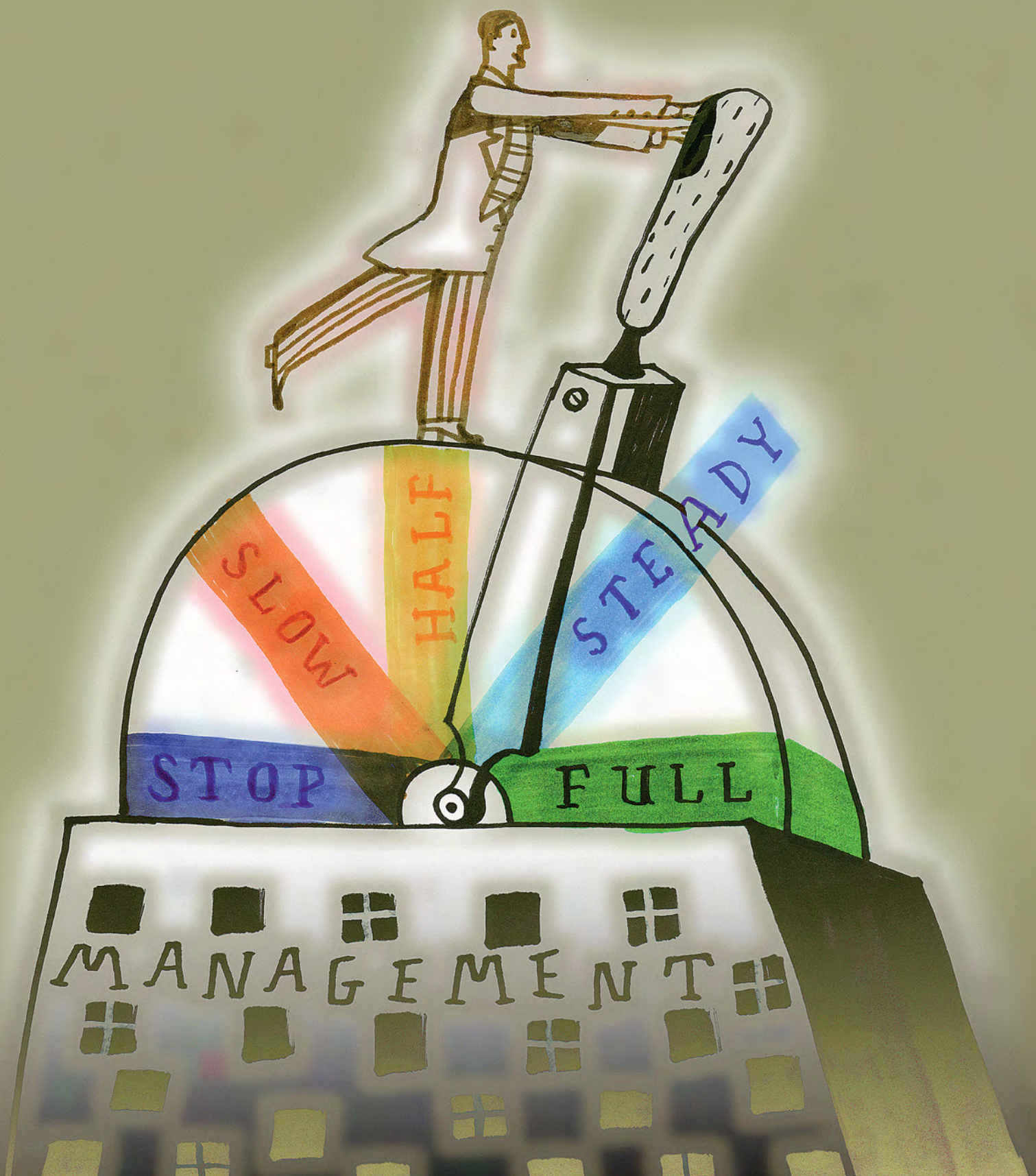


FULL SPEED AHEAD

How development directors are taking a leadership role through vision, resilience and commitment to mission

By Paul Lagasse

The recovering economy is a double-edged sword. Now that nonprofits' finances are more stable, they are scrambling to retain talented and experienced staff before they can be lured away by career prospects elsewhere.

According to the latest *Nonprofit Employment Trends Survey*™ from Nonprofit HR (**www.nonprofithr.com**) in Washington, D.C., and Chicago, voluntary turnover in the nonprofit sector was expected to jump from 10 percent in 2014 to 14 percent in 2015, due primarily to the lack of competitive salaries, promotion opportunities and staff resources. Further complicating the situation, the survey also found that three out of five executive positions were expected to be filled from other nonprofit organizations. As a result, senior nonprofit staff no longer have to fear that leaving their current position will mean having to take a lesser-paying job or leaving the sector altogether—both common fears at the height of the recession.

One way to entice development directors to stay, experts advise, is to provide them with opportunities to exercise their leadership skills throughout the organization.

Vision and Resilience

The current situation was foreshadowed by a landmark survey of executive directors and development directors, *UnderDeveloped: A National Study of Challenges Facing Nonprofit Fundraising,* conducted by CompassPoint Nonprofit Services (**www.compasspoint.org**) in Oakland, Calif., and the Evelyn and Walter Haas, Jr. Fund (**www.haasjr.org**) in San Francisco. The 2013 study reported that half of the development directors surveyed expected to leave their current positions within two years, with 40 percent leaving fundraising altogether. According to Marla Cornelius, MNA, senior project director at CompassPoint and, with Jeanne Bell, co-author of *UnderDeveloped*, development directors are often drastically underutilized in organizations that have complex hierarchical structures. "On the other hand," Cornelius says, "in organizations that empower, leverage and democratize leadership, chief development officers are in a position to really embrace leadership and not just to manage fundraising."

Penelope Burk, president of Cygnus Applied Research (**http://cygresearch.com/dev**) in Chicago and Toronto, agrees. In rigidly stratified organizations, she says, "the CEO holds the vision and the power. In those environments, change equals fear, and people protect the welfare of their own programs."

A leader, on the other hand, focuses on the welfare of the entire institution. "While managers are dealing with the present and making the current programs as effective as possible," Burk adds, "the leader is asking, 'What's coming? What do I see on the horizon? And how do we prepare for it?'"

The change that results from long-range vision often entails risk, however. Suppose an organization's fundraising revenue from direct mail is declining. Rather than focusing on how to wring the last drops of revenue from that source, a visionary development director would instead proactively reduce his or her organization's dependence on direct mail and simultaneously bring other fundraising streams online. Nevertheless, CEOs and board members often balk at any argument in favor of abandoning tried-and-true techniques. In such instances, the development director must make the case for taking the risk, including acknowledging that the new approach may fail. And, as a rule, failure tends to be a lot more common than success.

One way to overcome resistance is to get people used to focusing not on success but on learning from failure, Burk explains. Development leaders exhibit resilience, bouncing back from their failures, by learning what went wrong and what to do better the next time. And, by their example, they encourage others to take smart risks, too.

TODD DAVIDSON/ILLUSTRATION SOURCE

A Healthy Marriage

The likelihood that a chief development officer will be able to convince the CEO and board to feel at ease with risk and to bounce back from failure will depend largely on how good a match they are to begin with. Ronald J. Schiller, a founding partner of Aspen Leadership Group LLC (**www.aspenleadershipgroup.com**), says that the key to ensuring a good "marriage" between a leader and his or her organization is mission alignment. "Skills, talents, qualifications and experience are great," Schiller says, "but without a deep connection to mission, the person is bound to be less successful and, frankly, less fulfilled. And if you're faking, donors will know it."

As with any long-lasting marriage, a development director should not "settle" for the first relationship that comes along. The chief development officer and the CEO should be in agreement when it comes to the organization's vision and passion for the mission. "Take care when hiring, because an ineffective leader can do a lot of damage in a short amount of time," Schiller warns. "It takes a long time to undo a bad decision."

Schiller also recommends investing in leadership training. This includes giving staff the opportunity to try new roles, pursue continuing education opportunities and expand their networks by attending professional conferences and events. "Let your organizational chart flex," Schiller recommends. Too often, he says, organizations underinvest in talent management, and, in a crunch, the training budget is often one of the first items to be eliminated. Schiller says that this is a shortsighted move that can often lead to disaffection among staff members who feel that their career choices are sacrificed along with the training budget.

New Survey Will Focus on the Bright Spots

UnderDeveloped: A National Study of Challenges Facing Nonprofit Fundraising, the 2013 survey of executive directors and development directors conducted by CompassPoint Nonprofit Services (**www.compasspoint.org**) and the Evelyn and Walter Haas, Jr. Fund (**www.haasjr.org**), identified a "vicious cycle" of conditions within many nonprofits that was not only driving frustrated development directors out the door but also making it difficult for organizations to bring in new development directors to replace them. The cause of the cycle, the survey concluded, was the lack of a "culture of philanthropy" that encouraged staff and volunteers to see themselves as donor-focused ambassadors of their organizations.

Having identified the problem and its causes, the Haas, Jr. Fund, CompassPoint and Klein & Roth Consulting (**www.kleinandroth.com**) in Oakland, Calif., have since undertaken new research to study nonprofits that have been able to avoid, or break, the vicious cycle and, in so doing, achieve breakthrough successes with fundraising. Although the report is due out in early 2016, the research team is able to share some illuminating preliminary insights in advance that will no doubt be of interest to fundraisers eager to achieve similar outcomes in their own organizations.

The new study employs positive-deviance analysis, also called bright-spotting. Bright-spotting focuses on identifying organizations that have attained better results than their peers who are operating within similar environments and within similar conditions. The goal is to provide nonprofit leaders with case studies that are replicable across a broad range of nonprofits, says Marla Cornelius, MNA, senior project director at CompassPoint. "We wanted to find case studies that are not just interesting but that are replicable," she explains.

CompassPoint began by inviting nonprofits to nominate social justice and social change organizations with budgets of between $500,000 and $5 million that had experienced significant sustained growth over the past several years. From the 100 organizations nominated, the research team selected 12 on which to focus. At each of the 12 organizations, they then conducted five in-depth interviews, one each with the executive director, the development director, a program director, a board member and a donor. The goal was to identify how each organization's successful fundraising program began, what its strategies and results were and what lessons could be extrapolated from their experience.

"The largest source of funding for many small organizations, particularly social justice organizations, has traditionally been foundations and government grants," Cornelius explains. "These bright spots are different in that they've been able to raise significant funds from individuals in their communities."

Despite the focus on organizations of a certain size and mission, nonprofits of all kinds will find something of value in the results, Cornelius says, whether related to culture or infrastructure or fundraising practice. "There will be important lessons here," she promises. "Everyone will pick up something of value."

Innovation and training are also important for attracting and keeping young talent, says Deanna Horn, a real estate agent in Langley, British Columbia, who volunteers on numerous boards in her community. Horn is the chair of the board of directors of the Langley Memorial Hospital Foundation (**www.lmhfoundation.com**) and president-elect of the British Columbia Real Estate Association (BCREA, **www.bcrea.bc.ca**), and both organizations maintain active leadership training programs. The hospital foundation, for example, offers, one-day strategic planning and governance trainings, roundtables and networking events that bring together leaders from local and regional nonprofits. BCREA has a dedicated budget line item for training and sends board members to annual, two-day intensive programs. Horn also endorsed an annual governance training session for the board as a whole. Because the training programs are visible demonstrations of their organizations' dedication and professionalism, Horn says that they have boosted their reputations in the community and their clout with prospective board members.

Another way that chief development officers can demonstrate leadership in their organizations, and in the fundraising profession at large, is to volunteer on the boards of other organizations, particularly smaller ones that may lack expertise, Schiller suggests. It is an inexpensive way to broaden your experience and to see things from a donor's and/or a board member's perspective. Serving on finance committees, for example, may provide broader insight into what works and what doesn't in financial planning and how fundraising fits into a larger financial framework. Furthermore, such service can make you one of the "go-to" people in your local nonprofit community and foster goodwill for your organization. "It far outweighs the opportunity costs," Schiller says. "Creative leaders understand this."

At the same time, a good leader is both a beneficiary and a benefactor of mentorship. "People gravitate to talent magnets, but they also follow and learn from them," Schiller says, emphasizing that a critical component of successful leadership is followership. "Great leaders will tell you stories about their role models." Even so, Schiller admits, there are some things about great leaders that are innate. "You can't teach hard work," he points out, "and you can't teach caring."

Putting Ideas Into Practice

Hard work and an abundance of caring were vital to the success of the renovated advancement program at Loma Linda University (**www.llu.edu**), a Seventh-day Adventist educational and health sciences institution in Loma Linda, Calif. Until recently, each of the university's eight professional schools and six hospitals had its own development program, resulting in duplicated effort, conflicting messaging and diluted revenues. Richard H. Hart, M.D., DrPH, the university's president and CEO, realized that such an arrangement could not support the university's upcoming multimillion-dollar Vision 2020 capital campaign. Could an advancement director with a new strategy forge a single, passionate, mission-oriented team out of a gaggle of competing departments in time for the campaign?

Soon after accepting the position as the university's first senior vice president of advancement, veteran fundraiser Rachelle B. Bussell, CFRE, discovered that not only did the 14 individual advancement teams not communicate with one another, but many had never even met. "Each person had his or her own focus," Bussell recalls. "I had to find a way to get them to back up and see all their strengths working together." Her pitch? Give her a year to prove that they could make more of an impact collectively than individually while respecting the identity of each school or hospital.

Through patience and persuasion, Bussell and her team efforts eventually won them over. "Some were on board right away, some tested the waters and some stood back," she says. Critical to her success was the support of Dr. Hart, who named her to the university's executive leadership team. Fundraisers likewise responded positively to the flattening of the reporting structure and Bussell's encouragement to take risks. Eighteen months later, Bussell says, the university is seeing a "tremendous" increase in both the number and amounts of gifts. In 2014, in fact, more than 70 percent of major gifts were the result of the new, coordinated approach. During the same time, the team rebranded the institution as one coordinated body driven by a single mission.

"It's been an incredibly exciting time," Bussell says with a mixture of pride and relief. "I'm even more excited by the opportunities that lie ahead."

Paul Lagasse is a freelance writer in La Plata, Md. (www.avwrites.com).

Resources and Additional Reading

The Chief Development Officer: Beyond Fundraising by Ronald J. Schiller (R&L Education, 2013), paperback, 170 pages

Donor-Centered Fundraising by Penelope Burk (Cygnus Applied Research, 2003), paperback, 238 pages

Donor-Centered Leadership by Penelope Burk (Cygnus Applied Research, 2013), paperback, 376 pages

UnderDeveloped: A National Study of Challenges Facing Nonprofit Fundraising
www.compasspoint.org/underdeveloped

What's After Next?

How innovative chief executives use entrepreneurial techniques to lead and motivate their staff and volunteers to succeed

By Paul Lagasse

Being innovative is the must-have quality of any successful leader in the competitive for-profit sector, but that attribute is generally not mentioned as often with regard to those who lead nonprofit organizations. Maybe that is beginning to change.

When the board of trustees of Shaw University (**www.shawu.edu**) in Raleigh, N.C., began its search for the school's 17th president, it sought someone who possessed not only academic and administrative experience but also business acumen—someone who would "merge the qualities of excellence in higher education with the professionalism of the boardroom," as board chair Dr. Joseph N. Bell Jr. explains. Initially, faculty and staff were concerned that a for-profit management style would be at odds with the culture of Shaw, the oldest historically black university in the southern United States, which celebrated its 150th anniversary in 2015. However, the board understood that a business-savvy leader would help ensure that the university would thrive amid an uncertain economy. In the brief time since she was announced as the new president in June 2015, Tashni Dubroy, Ph.D., has already won over her skeptics.

"Every leader needs to have a vision and must be able to motivate others who may not see it yet," says Dubroy, who came to Shaw as a student and worked her way up the academic ladder to become chair of the university's natural sciences and mathematics department. To get the university to think entrepreneurially, she habitually employs terms such as "return on investment" and "value proposition." "I am training the organization to think in a different manner," she explains.

To that end, shortly after becoming president, Dubroy launched the *This is E.P.I.C.!* campaign for faculty, staff and students. The campaign encourages entrepreneurial thinking and excellence, presence in the community, clean and tidy spaces and excellent customer service. Dubroy says that the campaign is catching on quickly, especially among students.

Dubroy is always on the lookout for ways to celebrate effort and accomplishment, whether through praise and recognition, career development opportunities or even gift cards and extra time off for vacations. "Rewarding people for their work is important to me," Dubroy explains. "I want to make sure they're enjoying themselves."

Dubroy also encourages entrepreneurial thinking by asking people to think farther ahead than they are accustomed to. She describes this approach as a living strategy, forever flexing and stretching to identify and seize opportunities. "When I have strategy sessions with my vice presidents," she says, "I'm always asking them, 'What's after next?'"

STEPHANIE DALTON COWAN/GETTY IMAGES

The WD-40® Approach

Hybrid nonprofits—organizations that blend business management principles with mission-driven social outcomes—are a natural fit for energetic, visionary leaders such as Dubroy. Their emphases on accountability, transparency and measurable outcomes are in sync with today's business-savvy, data-driven donors who are more likely to view their gifts as social investments. And increasingly, business leaders are encouraged to join nonprofit boards as much, if not more, for their fiscal and managerial acumen as for their wealth and connections. Successful leadership of hybrid organizations requires executives to possess a different suite of skills than they were required to have just a few decades ago, and that can be a challenge for even the most visionary leader.

One of the most important requisite skills for an entrepreneurial leader, and one of the most important concerns raised about hybrid nonprofits, is a tolerance for risk. Investors give their money to for-profit companies knowing that the venture may fail and that they may not see a return on their investment. Donors, on the other hand, have traditionally given their money to nonprofits

Nonprofit Leadership Doesn't Always Come from the Top

In many nonprofits, particularly smaller ones, staff members often wear more than one hat. Even in the most flexible organization, however, there's usually only one CEO. That does not mean that other people cannot be leaders, too. In fact, the most effective nonprofits recognize that leadership happens at all levels. The trick is to know how to lead your boss when the opportunity, or the urgent need, arises.

"If you're in a position to make a difference, then you need to step forward and get the support to make that difference," says Michael Useem, Ph.D., the William and Jacalyn Egan Professor of Management and Director of the Center for Leadership and Change Management at the Wharton School at the University of Pennsylvania (**http://wlp.wharton.upenn.edu/leadership-center**) in Philadelphia. "On some days, that may mean doing something that you might not otherwise have done. On other days, that may mean helping others below you to get to where they need to go."

Useem is the author of *Leading Up: How to Lead Your Boss So You Both Win* (Crown Business, 2003), a collection of eight case studies of men and women who led from below—and some who tried and failed—in war and peace, in the boardroom, in the halls of government and even on the flanks of Mount Everest. The key ingredient of leading up, Useem says, is communications. Subordinates can help their superiors make smart decisions by providing them with timely and accurate information, by offering thoughtful feedback and constructive criticism and by not being afraid to make a case and stand by it.

Leading up is especially important in nonprofits because of the unique emphasis on mission above all. "A nonprofit organization places greater value on people below the executive director being knowledgeable about the mission and savvy about the strategy," he points out. "That's because they don't serve the executive director or the board. They serve the people who need the service that the organization provides."

Useem has also written about the changing role of board leadership. In *Boards That Lead: When to Take Charge, When to Partner, and When to Stay Out of the Way* (Harvard Business Review Press, 2013), co-authored with Ram Charan and Dennis C. Carey, Useem notes that in a corporate setting, the board is responsible for monitoring the organization on behalf of the stockholders. In a nonprofit, however, the leadership and management role of the board is typically more ambiguous. Good board members, Useem explains, can do more than just bring in gifts. If they have leadership experience, the board members can work with the executive director to solve thorny management issues. The best nonprofits facilitate that kind of interaction.

"If you compare the quality of board governance over the past 20 years, you'll see they have become more independent, savvier and more leadership-oriented," Useem says. "A good chair will work with the board to ensure that all the voices are heard in the boardroom, that everyone respects each other and that they bring out the best in each other."

with the expectation that their gifts will see a return—not for them personally, but for the program they have chosen to support and, by extension, the community at large. Is it therefore unethical for a nonprofit to take risks?

"Probably one of the most important things for a leader to do in order to encourage risk taking is to allow people to fail," says Lisa Petrides, Ph.D., CEO and founder of the Institute for the Study of Knowledge Management in Education (**www.iskme.org**), an education nonprofit in Half Moon Bay, Calif., that supports the development of innovative teaching and learning practices through continuous learning and collaboration. Petrides calls it the "WD-40® approach," after the lubricating and water-displacing spray whose name refers to its having been the 40th attempt at a successful product. "They embraced their failures," Petrides observes. "They built the story of their failure into the success."

Similarly, Petrides argues, entrepreneurial nonprofit CEOs should encourage a culture of risk and accountability throughout their organizations. Accountability is important. Leaders must still be able to demonstrate impact to donors, as they always have done. With sound metrics in place, an organization can utilize the outcomes of both its successes and its failures. "Metrics have to have built into them enough flexibility to encourage learning from your mistakes," says Petrides, who credits the approach with sustaining an organization through the recession, as well as through a shift to create a sustainable business model for the nonprofit. "Successful or not, I always ask, 'What worked, what didn't work and what have we learned because of it?'" she says.

Macro-Managing

In small nonprofits, empowered staff and volunteers are an operational necessity. People who are entrusted with responsibility, authority and autonomy do their jobs more effectively and make better ambassadors. Furthermore, they are more able to shoulder the burdens of sudden, dramatic shifts in scale, scope or mission. Amy Wolfe, CFRE, president and CEO of AgSafe (**www.agsafe.org**) in Escalon, Calif., can vouch for this. Over the past 18 months, her organization, which provides safety and health training for agricultural workers, supervisors and employers throughout the western United States, has doubled its budget and tripled its staff and soon will be extending its operations across the country to the East Coast—a dizzying expansion that Wolfe says could have happened only because everyone in the organization was as dedicated to its success as the leadership was.

"We like to say we macro-manage around here," Wolfe explains. "People have a tremendous amount of autonomy." AgSafe relies on cross-training, regular meetings, conference calls and regular communications to ensure that everyone knows what everyone else is doing. Thus, everyone has at least some idea of how to do others' jobs, too, not only so that they can step in if needed but also so that they know what they are asking of others.

With a budget of $2.6 million and a staff of 17, having a dedicated fundraiser is not currently feasible. The development manager splits her time with communications, and the operations director also manages the grants. And Wolfe is constantly on the move handling new business development. Here again, the organization's culture of philanthropy works to its advantage. "We're all fundraisers here," Wolfe says. "Everyone on our team—soup to nuts, top to bottom, front to back—knows that they are representatives of the organization."

The Effect of a CEO's Fundraising Knowledge

A longitudinal, qualitative study was conducted with CEOs of 12 fundraising organizations across Australia to answer the question, "How might a change in a CEO's fundraising knowledge improve fundraising activity and outcomes for his or her organization?"

The CEOs, along with Caitriona Fay, philanthropic services manager at Perpetual Private in Sydney, and lead researcher Dr. Wendy Scaife, senior research fellow at the Australian Centre for Philanthropy and Nonprofit Studies at Queensland University of Technology in Brisbane, traveled to San Antonio in 2014 to attend the AFP International Fundraising Conference.

The working paper, *Pivotal people, pivotal journeys: Interim report on the impact of a fundraising study tour on CEOs and their organisations* by Wendy A. Scaife, Marie Crittal and Katie McDonald (2015), can be read at **http://eprints.qut.edu.au/87409/1/Pivotal%20people%20pivotal%20journeys%20V8.pdf**.

Wolfe encourages her people to be open about their concerns, challenges and frustrations so that she can help them find solutions. Because she believes in leadership by example, Wolfe is just as candid with her staff and board about the challenges she faces as the head of the organization. "I regularly talk about what I'm struggling with," she explains. "It gives people permission to share theirs, too."

Speaking of challenges, Wolfe says that she has found few resources dedicated to helping executives of fast-growing, small nonprofits to manage the operational and administrative aspects of the job. Like many small organizations, AgSafe relies on consultants and outside experts, but she would like to see something more systematic emerge. "I'd like to see a place for safe conversations among leaders," she says. "It's a lonely place to be."

Followership

By Eugene A. Scanlan, Ph.D.

Many years ago, at my college commencement, our speaker started his speech something like this: "Lots of commencement speakers talk about leadership. I'm here to talk about something equally important: being a good follower. We all can't be leaders; many of us need to be good or even great followers."

I hadn't thought about this for years, but I think what I may call "followership" can be equally important for an organization to run effectively. Apple's Steve Jobs had several things to say that can be applied to "followership."

- "Be a yardstick of quality. Some people aren't used to an environment where excellence is expected."
- "If they (employees) are working in an environment where excellence is expected, then they will do excellent work without anything but self-motivation. I'm talking about an environment in which excellence is noticed and respected and is in the culture. If you have that, you don't have to tell people to do excellent work. They understand it from their surroundings."

And management guru Peter Drucker talks about organizational decision making and roles this way: "Most discussions of decision making assume that only senior executives make decisions or that only senior executives' decisions matter. This is a dangerous mistake. ... Making good decisions is a crucial skill at every level."

Even William Shakespeare had something to say about being a good follower: "Yet he that can endure to follow with allegiance a fall'n lord, does conquer him that did his master conquer, and earns a place i' the story" (*Antony and Cleopatra,* Act 3, Scene 13).

So what do I mean by "followership"? First, consider what it does not mean:

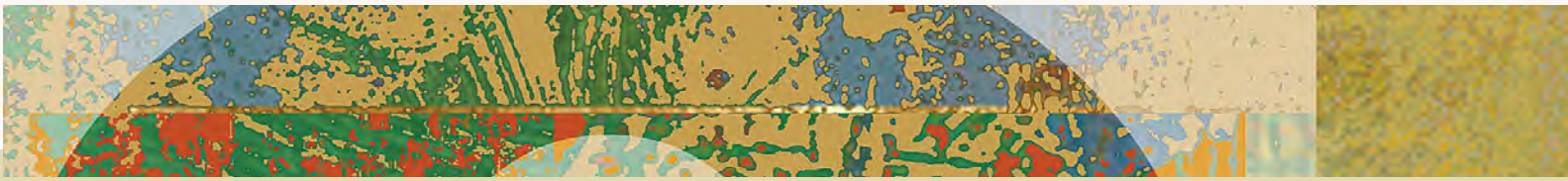
- Blindly following a leader, no matter what he or she wants, says or does
- Believing your niche—your job description and role—is the limit to what you should do, be involved with or think about
- Feeling your ideas, creative thoughts and insights beyond your role will not be welcomed
- Believing that an organization's leaders are solely the product of the organizational chart
- Accepting that consensus is the best way for an organization to proceed

You should recognize that leaders without followers are not leaders at all, merely figureheads. My favorite story about this came from a tiny lady, Lydia, with whom I worked many years ago. She once told me that, several years before I knew her, she had been an active member of the Industrial Workers of the World (IWW) in Chicago. The IWW had organized a huge demonstration on Michigan Avenue, and as they assembled, they realized that they were surrounded by members of the military, who had aimed several machine guns at

Broad and Deep Networks

Keith Burwell, president and CEO of the Toledo Community Foundation Inc. (**www.toledocf.org**) in Ohio, shares Wolfe's belief in the importance of connecting with colleagues. It is particularly important in the world of community foundations, he argues, since no two are alike. "I think the best leaders in community foundations are the ones with the broadest and deepest networks," he says. "We don't have that infrastructure in our community, which means I approach leadership by looking at how we can leverage relationships."

The Northwest Ohio Pathways HUB (**www.hcno.org/health-improvement-initiatives/pathways.html**) is an example of how Burwell leveraged the Toledo Community Foundation's connections to address a seemingly intractable health issue. A decade ago, three



the demonstrators. Lydia, probably less than 5 feet tall, turned to the crowd and said something to the effect, "They'll never shoot us. Follow me!" And she started to walk toward the machine guns. As she walked, she noticed that many of the guns were trained on her. She turned around and saw that no one had followed her. She quietly walked back and merged into the crowd.

Here was a leader without followers—out there, exposed, vulnerable and alone.

During my many years as a consultant, I often had to play a more subtle role than trying to be a leader. Board meetings could be especially sensitive times because I needed to get across findings and results of studies or report on progress without seeming to take over the board. Also, I often would need to get critical decisions made but could not seem to push the board too hard or too fast. So, essentially, I was playing the role of a follower by taking the time to listen and answer questions while keeping things moving along toward the goals I had set in my mind.

As a development staff member at various organizations, I also needed to become a good follower while still being someone recognized as having valuable input. For example, as the director of development at one organization, I asked to attend all meetings of the program staff because new program ideas and plans were being developed in these meetings, and my input could help better shape new programs that might be more fundable than others. I also came to have a better understanding of the programs' details so I could shape proposals to potential funders.

Sometimes as a follower, you may have a leader who is difficult, demanding, caught up in the organizational structure and status of employees or even taking the organization in what you and others believe is the wrong direction. Some signs of a problem leader can include:

- Building "silos" around departments or program areas (an easier way to control what happens)
- Insisting that he or she knows more about what you are doing than you do
- Trying to assume your management or staff role
- Running meetings with little or no input from other key staff
- Directing the planning process toward his or her objectives rather than in keeping with the mission and goals of the organization
- Demanding 24/7 accessibility to staff and immediate responses from them
- Expecting that all employees will be totally dedicated to the organization rather than balancing work with other personal priorities, such as family
- Ignoring constraints on the organization, such as budgets, funding and outside factors (e.g., regulations, service areas, etc.)

The easy thing to do is to become the passive follower—stay in your cubicle, do your job, listen to the gossip and anger of others and then go home at the end of the day. The more difficult thing to do is

Continues on page 34.

zip codes in Lucas County, in which Toledo is located, were found to have high numbers of babies born at dangerously low birth weights, in some instances at twice the national average. Low-birth-weight (LBW) babies are at risk of chronic ill health, which can imperil the finances of low-income families. Both a program and the resources to implement it were lacking.

The Toledo Community Foundation tapped into its local network of healthcare practitioners, hospitals, social workers, grant makers and public health officials to organize the Pathways HUB, based on a model program for LBW babies first pioneered by a physician in Alaska. The foundation invited the physician to come to Lucas County and replicate his program. An army of social

Followership (continued)

to play a more active role and address the negatives with positive action. Development staff members are uniquely positioned to make this happen by giving feedback from members, donors and others about the need to change.

So what are the characteristics of a good or great follower? Here are some ideas you may consider:

- A good follower understands the mission of his or her organization and its importance in the larger environment.
- He or she understands the major programs, services and activities of the organization and how these meet the needs of those served.
- The good follower is willing to think creatively beyond his or her role about ways the organization can improve, become more effective and efficient and meet new or changing needs within its mission.
- He or she is willing to actively express and promote these ideas, techniques, internal improvements and other things that will enhance the organization and its effectiveness.
- The good follower sets an example of excellence and quality in his or her work, no matter what the work entails.
- He or she participates as much as possible in the broader aspects of the organization and contributes to them.
- He or she is willing to actively express and promote ideas, techniques, internal improvements and other things that will enhance the organization and its effectiveness.
- The good follower believes in the value and abilities of others to contribute to the organization and its improvement and actively encourages them to do so.
- He or she encourages teamwork and the open exchange of ideas, perceptions and legitimate concerns related to the organization.
- He or she encourages, both by example and attitude, open and honest discussion and the free exchange of ideas and suggestions in meetings.
- As much as possible, the good follower discourages consensus agreements and favors the open expression of dissenting views as well as explanations of why these views are held. As I used to say to some clients who favored consensus approaches, lemmings have 100 percent consensus as they go over the cliff together.
- In all of his or her work and activities, the good follower acts with the highest standards of ethics, honesty and openness.

After you review these characteristics of a good or great follower, you may ask yourself, "Aren't those the same or similar characteristics of a good leader?" And maybe that's the real point of good or great followership.

Eugene A. Scanlan, Ph.D., retired president of eScanlan Consulting Company, author and former adjunct professor at George Washington University and the University of Maryland University College, presently lives in Sechelt, British Columbia (eugenescanlan@mac.com).

workers canvassed the county, knocking on every door, developing a comprehensive census of LBW children in the county and helping families get access to health and childcare, as well as housing and food assistance.

The program has succeeded in lowering instances of LBW children in Lucas County from 13.4 percent in 2013 to 9.5 percent the following year. The project is serving as a model for other communities in Ohio and across the country, and the U.S. Health Resources and Services Administration has selected it to be part of a national demonstration project on improving health outcomes. "We accomplished all that as a result of networking," Burwell says with pride. "That's the beauty of the networks. Something that works in, say, the Silicon Valley Community Foundation can work here."

All it takes is someone with out-of-the-box vision. Burwell is quick to point out that such vision is cultural, not individual. "I don't perceive myself as the only captain of the ship," he says. "We each do our part in looking forward."

The Journey Is the Deal

Regardless of the size or mission of their organizations, whether they consider themselves to be charismatic or cerebral, effective nonprofit leaders credit their openness to new ideas as a vitally important tool of their success. Whether traveling, reading or speaking with old friends or complete strangers, they are always on the lookout for something that works for others that might work for them. They also emphasize that this trait is more common than most people think.

"It's absolutely something you can learn," says David G. Phillips, president and CEO of Custom Development Solutions Inc. (**www.cdsfunds.com**) in Mount Pleasant, S.C. "Leadership is not something that you're born with. It's something that you have to cultivate. Like respect, it's not something you can give yourself."

Phillips, for example, is an inveterate reader, and many of his insights into the nature of leadership he picked up from books of all kinds. Right now, he is intrigued by author Carol Dweck's idea, as written in *Mindset: The New Psychology of Success* (Ballantine Books, 2007), of people having either a growth mindset or a fixed mindset. People with a fixed mindset, as Phillips describes it, are perfectionists who tend to go to pieces when they make a mistake. People with a growth mindset, on the other hand, learn from their mistakes and are open to others' ideas, which helps them bounce back and do better the next time.

Echoing the philosophies of Petrides and Wolfe, Phillips says that the willingness to take risks and fail is one of the most valuable attitudes that a leader can pass along to his or her staff. "You have to teach your people that making mistakes is part of the game," he says. "Struggling is important." He likens it to the soreness you feel after working out at the gym. It is a sign that you are getting stronger.

Fundraisers believe in the power of the story. Successful nonprofit leaders recognize that one of the most important stories a nonprofit can tell is its own. By encouraging their people to take smart risks, the most innovative nonprofit leaders empower them to do things that could become the next chapter in their organization's saga. The result, Phillips says, is a more loyal, cohesive and passionate team, and that can translate into greater mission effectiveness.

"The journey is the deal," Phillips says. "Summiting the mountain is fun, but it's the people you summit with that make the hurrah."

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Change

for the Better

How CFRE International's updated credential reflects the latest best practices

By Paul Lagasse

Nothing ever remains the same, and the Certified Fund Raising Executive (CFRE) credential is no exception.

As part of a regular five-year review cycle, CFRE International (**www.cfre.org**) in Alexandria, Va., which oversees the CFRE credential, has updated application requirements and the test content outline in order to better address the needs of fundraisers and the philanthropic sector worldwide. The changes are evolutionary, not revolutionary, and reflect fundraising's growth as a maturing profession. "The changes we're seeing are not radical because fundraising as a profession hasn't changed radically since the test content outline was last updated five years ago," says Eva E. Aldrich, M.A., CFRE, president and CEO of CFRE International. While some of the changes may appear bold at first glance, she explains, they are actually simply subtle shifts in emphasis. "Don't think of it as moving from cold to hot. Think of it as adjusting the temperature of a room by a few degrees."

Aldrich says that many CFREs do not realize that the CFRE credential is the only accredited credential for fundraising professionals. As part of maintaining accreditation by the National Commission for Certifying Agencies, CFRE International undertakes a thorough review of the CFRE test content outline every five years to ensure that it continues to reflect contemporary fundraising best practices. In 2015, application requirements were reviewed and updated as well. The review process involves three groups working together: the CFRE International board of directors and two working groups, the job analysis task force and the exam committee. Each group brought a wealth of experience and wisdom to the task of ensuring that the CFRE credential will continue to serve CFRE International's vision of a world in which philanthropy is practiced in an environment of trust, respect and accountability.

Identifying Baseline Best Practices

CFRE International goes to great lengths to ensure that the test content outline is not only truly practice-based but also reflects the profession's current best practices. Critical to that process is an extensive international survey conducted by the organization's job analysis task force. The survey, which is distributed to thousands of fundraisers in North America and around the world, solicits information on what tasks fundraisers perform, how often the tasks are performed, the importance of the tasks to fundraising success and the knowledge used to perform the tasks.

Results of the survey (which is guided by psychometricians at the professional testing agency with which CFRE International partners in order to ensure test validity) are used as the basis for the test content outline, which reflects the base level of essential and relevant knowledge and experience that a fundraiser should have obtained af-

MARK SHAVER/ILLUSTRATION SOURCE

ter five years in the profession. The results of the survey were enlightening—and reassuring. "We find ourselves sensing that there are major shifts going on in the fundraising world," says Marnie Hill, CFRE, vice chair of CFRE International and senior manager of legacy giving at the Canadian Red Cross (**www.redcross.ca**) in Victoria, British Columbia. "However, what came out of the survey was that, yes, there have been some shifts in the past five years, but they have been small."

The shifts identified by job analysis research had mostly to do with the advent of new technologies, not with core principles of fundraising. "We had to constantly remind ourselves in our discussions that this review was about confirming current core knowledge indicated by contemporary fundraising practice," Hill says, "and not anticipating future trends and tools that may or may not be around five years from now."

Application Requirements Updated to Reflect the Current State of the Profession

The CFRE International board of directors includes senior fundraisers from around the world, including the United States, Canada, Germany, the United Kingdom, Australia and New Zealand. It was clear that, throughout the world, fundraising has matured as a profession since 1981, when the CFRE credential was founded, but application requirements had remained much the same.

Over the course of 18 months, the board tasked the exam committee with reviewing and updating application requirements to reflect the current state of fundraising as a global profession. The exam committee communicated multiple times, both in person and by phone, and invited leaders and experts to share their insights.

One of the critical issues that the board discussed early on was the requirement that applicants have a minimum of five years' employment as a fundraiser before they can sit for the exam. Several fundraising experts expressed to the board their concern that this requirement could be unnecessarily restrictive in today's career environment. "Young professionals coming into the sector today often have a formal education in development and nonprofit management that was simply not available when the credential was first established in 1981," explains Phil Schumacher, CFRE, ACFRE, chair of CFRE International and recipient of the Association of Fundraising Professional's (AFP's) prestigious Founders Medallion in 2012. "There has also been an increasing number of people who come to fundraising later in their careers and who have attended workshops, conferences, symposia and classes in fundraising. Many of these individuals have significant education and transferable experience that accelerates their understanding of best practices in ethical fundraising."

To enable the CFRE credential to better address the current state of the profession, the board explored the concept of allowing fundraisers to sit for the exam after gaining three years' experience instead of the traditional five. Schumacher says that the exam committee and board members worked together closely over the course of several meetings to hammer out the details. "It's important to know that at no time did the board discuss changing exam requirements," he emphasizes. "The CFRE exam continues to test baseline knowledge in ethical fundraising at the five-year level of experience. My goal was to make sure there was thorough discussion and a strong consensus for updating application requirements to reflect a minimum of three years of professional practice so that extremely well-qualified candidates have an accelerated pathway to the CFRE credential."

Once the board reached a consensus on the updated professional practice requirement, it floated the idea at CFRE International's Advisory Council Conference, which brought together key leadership representing CFRE International's 22 participating organizations. The conference in March 2015 was attended by fundraisers from the United States, Canada, Australia, New Zealand, Germany, Austria and Kenya. The response to the proposal was overwhelmingly positive. Based on that feedback, the board made what Schumacher deems "a very astute decision" to offer the three-year professional practice requirement beginning in 2016.

Schumacher stresses that the updated three-year professional practice requirement is not an attempt to

The **shifts identified by job analysis research** had mostly to do with the **advent of new technologies**, not with core principles of fundraising.

Another change that was made to **reflect the differences in philanthropic environments worldwide** has to do with volunteer service.

"water down" the credential. The exam will still test knowledge at the five-year level, and the education and professional performance requirements remain the same. Rather, the updated professional practice requirement is designed to provide highly qualified professionals with another avenue of access to the credential. "We don't encourage people to take the test before five years," Schumacher says. "But if they believe that they have the requisite experience and wisdom, they can now take it at 36 months. They just do so at their own risk."

Serving the Needs of Fundraisers Around the Globe

In addition to the updated professional performance requirement, there are several other changes that acknowledge and attempt to provide equity across the many and varied environments in which fundraisers operate around the world. For example, the professional performance category "Actual Funds Raised" includes the following changes:

- One point will now equal the equivalent of US$25,000 raised, rather than 25,000 units of the local currency.
- Applicants working in countries that are not members of the Organization for Economic Cooperation and Development (OECD) will receive an "economic equivalency adjustment" of an additional point for each US$25,000 raised.

In light of currency fluctuations that may affect "Actual Funds Raised" point totals, it is important to note that fundraisers can also count communications and management projects that directly support fundraising to fulfill their professional performance requirement.

Another change that was made to reflect the differences in philanthropic environments worldwide has to do with volunteer service. Formerly its own category, volunteering is now classified as service learning in the "Education" category. Applicants can count up to 10 points of service learning in this category.

To North American fundraisers, in particular, this last change may seem to suggest that volunteer service—a staple practice of fundraising in that part of the world—has been devalued in the new application requirements. However, that is not the case, says Leo Orland, FFIA, CFRE, chair of the CFRE International exam committee and account director at Robejohn & Associates (**www.robejohn.com.au**) in Melbourne, Australia. "CFRE International continues to value and encourage volunteer service. We wanted to still keep volunteer service, but we felt it disadvantaged fundraisers in areas of the world where extensive volunteer service is not as common or where a variety of formal volunteering opportunities are not as readily available," he explains. Orland points out that in many parts of the world, fundraisers do not have the same opportunities as their North American colleagues to serve on boards or committees as a matter of course.

The exam committee, which thoroughly vetted the application requirements and recommended changes to the board for approval, was sensitive to changes aimed at the global community of fundraisers in part because its seven members hailed not only from the United States and Canada but also from Australia, New Zealand and Germany. "The application requirements have not changed much since the credential was founded in 1981," Orland says, "but a lot has changed for CFREs since then. And the environment in which fundraisers come into the profession is also very different. We felt the application requirements needed to be reviewed in the context of these changes."

Pegging the point value for funds raised to a uniform currency, for example, provides greater equity because of the wide variation in base currency units around the world. The effort required to raise 25,000 Japanese yen (equivalent to approximately US$210) and 25,000 British pounds (approximately US$38,250) is very different, Orland notes. Likewise, the committee's decision to allow fundraisers in OECD nonmember countries to claim an extra point was approved only after much deliberation in an effort to identify an equitable balance for fundraisers operating in countries without a well-established philanthropic culture or abundant donors. "With this revision, we're acknowledging that

Ultimately, this is really about better supporting fundraising professionals and growing the philanthropic sector, which is a key pillar of civil society.

the CFRE credential is an international accreditation and that it is continuing to grow," Orland says. "We can't, and we don't want to, stay where we have been. We're adapting to the needs of today's international community of fundraisers while at the same time making sure that the credential honors its history and maintains the same quality that it has always had."

Poised to Expand

As CFRE International seeks to broaden best practices in ethical fundraising by maintaining the strength of the credential in North America and expanding access to the credential in other parts of the world, the CFRE credential promises to serve as a kind of skills passport for all fundraisers, whether they are working locally, nationally or internationally. "For credentialing to be truly successful, it has to be structured to fit a very broad range of educational experience," says Andrew Watt, FInstF, president and CEO of AFP (**www.afpnet.org**) in Arlington, Va. "The exam and the core body of knowledge must provide the flexibility to recognize and accredit a very broad range of educational opportunities for individual fundraisers no matter where they are."

This dual mission—maintaining a credential that is both deeply rooted in established practice and also highly portable for today's mobile professional workforce—is the real challenge facing the CFRE credential today and into the future, Watt explains. He notes that the nature of globalization is such that young fundraisers are more likely to spend at least part of their careers working overseas than previous generations did. That is why he is particularly enthusiastic about the updated three-year professional practice requirement for highly qualified, early-career fundraisers. "I think it's essential," Watt says. "People coming out of college today have a clear understanding of the role of nonprofits and theoretical knowledge of nonprofit management fundraising, and they struggle with the idea of having to wait five years."

Watt adds that the profession has been experiencing significant turnover in people under the age of 30 and is hopeful that the changes introduced to the CFRE application requirements will help reduce the drain of young talent.

Aldrich agrees. Along with her colleagues on the board of directors, the job analysis task force and the exam committee who have labored hundreds of hours to refine the CFRE exam, she believes that the changes reflect an incremental step toward more closely achieving CFRE International's guiding mission and vision. "Every year, I have the incredible privilege of attending fundraising conferences around the world," Aldrich says. "And wherever I go, fundraisers are talking about the same things and working on the same issues. We are more alike than we are different. Ultimately, this is really about better supporting fundraising professionals and growing the philanthropic sector, which is a key pillar of civil society."

Paul Lagasse is a freelance writer in La Plata, Md. (www.avwrites.com).

How Do Changes to the CFRE Affect Me?

Updates to CFRE application requirements and the test content outline reflect recent incremental changes in the fundraising profession. If you are currently seeking certification and have used the former test content outline to prepare for the exam, you will still be well prepared to take the exam in 2016 under the new test content outline. And if you had previously qualified for certification under the former application requirements, you will still qualify under the new application requirements.

To view the new test content outline and updated application requirements for initial certification and recertification, visit **www.cfre.org/resources/2016-cfre-programme-updates**.

Small Nonprofits *Can* Raise Major Gifts!

By Adrian Sargeant, Ph.D., Amy Eisenstein, ACFRE, and Rita Kottasz, Ph.D.

Major-gift philanthropy plays a hugely important role in our sector. How much so? According to Coutts (**http://philanthropy.coutts.com**), in 2013 almost $17 billion was given in million-dollar (or greater) donations to support nonprofits throughout the United States. Such figures are impressive, but relatively little is known about the nature of the organizations that receive such gifts and the critical factors that must be managed to drive successful major-gift fundraising.

A new study, *Major Gift Fundraising: Unlocking the Potential for Your Nonprofit,* sheds light on these issues, focusing on nonprofits with total income of $10 million or less. Interviews with fundraising leaders were conducted through a large-scale survey administered digitally through the Qualtrics platform. A total of 662 completed questionnaires were received from a wide variety of different categories of cause. The findings provide a window on the practice of major-gift fundraising and highlight the critical role that leadership can play, even in small organizations, in obtaining major gifts.

First, it was necessary to identify what the sample regarded as a major gift. As you may expect, there was considerable variability. The mean gift was $25,000, the median was $5,000 and the mode (the most frequently cited value) was $1,000. While the nonprofit sector tends to track and celebrate gifts of six figures or more, the reality for the organizations in the sample is rather different. Organizational leadership must therefore manage their expectations about what can realistically be achieved through a decision to invest in soliciting "major gifts."

Furthermore, it was clear that expectations must be managed with respect to the return on investment this form of fundraising may generate, particularly in the short term. Leading fundraising consultants have long advocated that organizations need to be in major gifts for the long haul, since it takes considerable time to identify appropriate prospects, cultivate relationships with them and then wait for the right project to appear that would be genuinely meaningful for a specific individual. Pushing fundraisers to achieve early results can result in not only lower-value gifts than otherwise would have been the case but also significant levels of donor dissatisfaction. At the same time, organizations prepared to wait must also recognize that their short-term financial performance will be affected by that decision. As staff members focus on developing relationships, they will not be engaged in other, more immediately profitable forms of fundraising. The process of relationship building takes considerable time and resources, and the study shows that every additional new donor in the acquisition pipeline is associated with a fall in revenue of around $300. That may not sound like a huge sum, but against the gift values cited above, it is highly significant.

Of course, the beauty of taking the time to build relationships and understand the projects that will be intrinsically and deeply motivational for supporters is that the eventual returns are excellent and typically on the order of $10 for every $1 of investment. Major donors, if properly stewarded, will rarely make just the one gift, and experience says that their first gift is rarely their largest. Study results show that each additional donor being stewarded after his or her first gift is associated with an additional $2,200 in income. So, while major-gift fundraising should rightly be seen as an investment, the ultimate returns it can generate make the investment very attractive indeed.

MATT CHALWELL/GETTY IMAGES

There are, of course, some caveats. Organizations need to have a pipeline of donors who can make a gift at the requisite level. In the survey, paid members of staff with responsibility for participation in major-gift fundraising appear to have a mean of around 20 donors in their portfolio. This figure is much lower than one might expect in larger nonprofits, because larger nonprofits have dedicated major-gift officers.

As Table 1 shows, small organizations with donated income of less than $1 million have an average of two members of staff engaged in some way with major gifts. However, when the time spent by these individuals and in the aggregate was analysed, it equated with only 30 percent of one full-time role. When looking at organizations earning between $5 million and $10 million, around three members of the team were involved in major-gift fundraising. Even here, the time spent equated to a little less than one FTE (full-time equivalent).

Table 1. Number of Fundraisers Employed to Work on Major Gifts

Donated Income	Mean	Mean Total FTEs
$5 million–$10 million	3.2	0.9
$1 million–$4.9 million	2.5	0.5
Less than $1 million	2.1	0.3

The short-term nature of the criteria used to evaluate these personnel was notable. As shown in Table 2, metrics such as dollars raised, numbers of new gifts, gift size, etc., predominate. None of these, however, are indicators of the long-term health or success of a major-gifts program. Although it is understandable that boards would track overall income, it is not understandable that they would neglect the drivers of future income. Fundraisers, like any other class of employee, will focus on behaviors that deliver to the metrics demanded by their managers. If those metrics are not aligned with the drivers of future success, the long-term sustainability of the program is in jeopardy. Pipeline measures must therefore be included in the nonprofit sector's metrics.

It is also worth noting that commercial marketing managers are now routinely rewarded for how satisfied they make their customers feel. Corporate executives recognized a long time ago that "very satisfied" customers have a substantively higher lifetime value than those who are merely "satisfied." The nonprofit sector seems to have been particularly slow to wake up to the reality that the same dynamic applies in the relationships charitable organizations have with their supporters.

The leading professionals interviewed for the study all stressed how important it is that board members play an active role in supporting their major-gifts team. It was not suggested that they necessarily need to participate in asking others to support the organization but rather that they facilitate the process by being prepared to act as ambassadors, meet with donors and help engage them with the organization. The survey results were therefore disappointing.

Respondents were asked about the extent to which they agreed or disagreed with a series of attitudinal statements, where 1 = strongly disagree and 10 = strongly agree. The results, as reported in Table 3, indicate that most board members do not play an active role in fundraising and that the various departments in organizations do not work together as well as they might to facilitate and ensure fundraising success.

This is important because many of these factors correlated highly with the level of major-gift fundraising

Table 2. Major-Gift Fundraising Metrics

Metric	Percent
Dollars raised in revenue	83.0
Number of new gifts	52.9
Donor engagement or commitment	41.3
Gift size or average gift size	39.1
Success rate in solicitations	31.7
Number of meetings attended with prospects	31.7
Donor satisfaction with the quality of service provided to them	28.5
Number of solicitations made	27.6
Donor satisfaction with the impact of their gift on the cause	27.2
Return on investment (in the past year)	17.6
Number of personalized gift proposals made	17.6

Table 3. Institutional Support for Major-Gift Fundraising

Statement	Mean Score
In our organization, donor stewardship is seen as everyone's responsibility.	5.03
Everyone in my organization understands the key role that he or she can play in supporting our fundraising.	4.90
Members of our board are actively involved in fundraising.	4.87
Members of our board all play a role in facilitating success in our fundraising.	4.71
In our organization, we have an inventory of major-gift opportunities at each gift level.	4.50
I regularly receive information on potential donors from others in the organization.	4.28
Volunteers are actively involved in the cultivation, solicitation and/or stewardship of major-gift prospects.	4.21

success achieved, particularly for the larger organizations in the sample.

The survey also revealed that boards need to adequately invest in their fundraising teams. Individuals who stay longer on the job raise significantly more gifts. Given that turnover rates in the profession of fundraising as a whole are high, this represents a significant challenge, particularly in smaller organizations where salaries may not be competitive. It is thus essential that nonprofits develop a plan to retain and develop the commitment of crucial fundraising staff.

The role of training and development is critical. A strong correlation was found between the range of training and educational opportunities afforded to staff and overall fundraising performance. Each additional form of training/education is associated with an increase of $37,000 in income. While many nonprofits will not invest in staff development because they fear individuals will leave and the monies will be wasted, survey results highlight how mistaken this approach is. Formal education and certification opportunities appeared to have the strongest relationship with fundraising success. While attendance at local events/conferences can be a helpful component of a staff development program, nonprofits would be wise to also consider providing support for more formal forms of study, such as a certificate or diploma in fundraising and/or a certification, such as the CFRE.

Finally, the study found that having appropriate information technology (IT) systems in place is another highly relevant factor driving performance. This was linked to success in the number of major gifts received. An investment in database technology facilitates the identification of prospects and the process of stewardship that may be employed with existing supporters. It also can play a role in creating an "institutional memory" to safeguard a nonprofit against the loss of key personnel.

In aggregate, the results offered considerable insight into how boards at even smaller nonprofits can play a critical role in driving the success of a major-gifts program. Fundamentally, they need to understand the important role that they personally can play in the process by developing a culture of donor centricity and giving active consideration to how they will interface and connect with donors. They also need to actively consider how to manage the factors now known to drive success, reorienting the organization around longer-term measures of performance and giving adequate consideration to key investments, in both their team and the technology that will support them.

We would like to thank the sponsors of this research project: Bloomerang (**https://bloomerang.co**), Donor Search (**www.donorsearch.net**) and the Support Center for Nonprofit Management (**http://supportcenteronline.org**).

For the 13-page summary report and the 68-page full report (including the literature review), visit **http://masteringmajorgifts.com/report**.

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Time Out!

By Mary Ellen Collins

Are you tired, frazzled, fed up, trying to do too much in too little time and with insufficient resources? Don't quit your job. Consider a sabbatical.

While sabbaticals are usually thought of as very desirable perks just for college professors, they may be an ideal solution that generates benefits for executive directors and CEOs, as well as their staff, the board and their organizations. As some have found, stepping away can actually draw them back closer to their mission.

"You don't get refreshed unless you have the time and the space to think and reflect," says Deborah Linnell, program officer at the van Beuren Charitable Foundation (**www.vbcfoundation.org**) in Newport, R.I., and co-author of *Creative Disruption: Sabbaticals for Capacity Building and Leadership Development in the Nonprofit Sector* (CompassPoint Nonprofit Services, 2010). "If a leader is refreshed and reenergized, they are likely to come back with a new vision or new excitement for the work."

Sabbaticals also can be a valuable retention tool for an organization, something Linnell knows firsthand. When she was the executive director of another organization at which she implemented a turnaround, Linnell found herself "fried" after six years on the job. "I had taken everything on my own shoulders. I was carrying too much weight, and I was so exhausted," she recalls. "I asked the board chair to give me a break for two months so I could breathe and think about how to manage this better."

The board chair declined her request, and Linnell moved on to a different organization several months later. "If I had gotten the break," Linnell says, "I think I could have given them another 18 months."

Unfortunately, sabbaticals are still relatively uncommon in the sector due to incorrect assumptions that an executive director on sabbatical is unlikely to return or that the organization will fall apart in that person's absence. On the contrary, the *Creative Disruption* study reports a range of positive outcomes, including the following:

- Sabbaticals do not contribute significantly to leaders' leaving their organizations. In fact, 77 percent of survey respondents who went on sabbatical stayed with their organizations.

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- Executive directors reported that managers who acted as interims during their absence were better skilled in their positions post-sabbatical.
- Sixty percent of respondents said their board of directors was more effective as a result of the planning and learning surrounding the sabbatical process.
- A sabbatical can give the organization insights into what future leadership may look like, leading to the creation of a succession plan.

The timing of the study, which was released in 2010—the height of the recession—may have diluted its impact, according to Linnell, but hopefully current attempts to raise the subject will bring it to the forefront of conversation in the sector. "The recession didn't bury the report, but, for leaders, the needs of their organizations put this subject [sabbaticals] very much on the back burner," she admits. "A lot of our best leaders will not even think about taking a sabbatical until there are more studies and more people are talking about the benefits. Sabbaticals should be talked about as one of the eight or nine tools that an organization needs to sustain itself and retain good people."

Of course, each sabbatical is different, with myriad reasons for taking a "time out," but the benefits are similar: a new outlook on life, work and the profession.

Disconnect to Reconnect

Carol Hardison, CEO of Crisis Assistance Ministry (**www.crisisassistance.org**) in Charlotte, N.C., did not set out to take a sabbatical. After years of joining her

brother for several days in the middle of his two-week European vacations, she decided to spend the full two weeks with him last summer. However, that was only the first step. "I thought that if I was going to leave for 14 days, I needed time to prepare and pack and then time to catch up and reconnect upon my return. At that point, I decided to seek an entire month off."

Her typical vacation was two days or a long weekend, and when she broached the subject of a month off with her board chair, he was immediately supportive and told her to take the time she needed. "But as soon as my brother started planning our packed itinerary, I started thinking, 'What about downtime for me—Carol time and reflection time?' And I ended up adding another 10 days!"

Although Hardison started out using the term "extended vacation," that caused confusion among staff and colleagues, so she switched to saying "sabbatical." "I needed to call it something that people would understand," she explains. "The one thing I was afraid of by using the formal term was having people think I would be doing research and writing, and I didn't intend to do that. It wasn't about accomplishing things. It was more about not accomplishing. I had intentions around wanting to disconnect from anything work-related so that my mind would go to new places and I would connect with new things, new places and new people, including reconnecting with family and friends. Only stopping the work train would allow that."

Her staff was excited for Hardison, but they weren't convinced that she could completely unplug from her work life. "My work is in 100 percent alignment with my purpose on Earth, and that can cause work/life balance issues," she says. "I surprised myself by how quickly I was able to disconnect, but that's because I completely trusted the team to make decisions and run the agency."

She had no contact with the office during her time off.

Hardison's sabbatical began with a weekend of pampering with a friend before heading to Amsterdam with her brother. He always planned his vacations to coincide with cycling competitions, and last year, the Tour de France began in Holland.

After returning to the United States, Hardison spent a week by herself at a friend's home in the mountains, where she took walks, read and simply enjoyed the solitude. She then went home and switched gears and welcomed a visit from her seven-year-old great nephew. "Discovering things in your community through the eyes of a child was just a thrill," she says. "What was wonderful for me was realizing how many fun things there were to do and places to go that I did not even know about."

Having a substantial period of time in which to separate herself from the day-to-day running of the organization resulted in a new way of thinking about work. "A vacation is sort of a temporary departure, but a sabbatical gives you the ability to find your natural self," Hardison says. "My natural mind goes to the big picture, and I allowed the bigger view to come into my brain. I thought about how it happened that our wonderful community became a place that has such a problem with poverty. When I walked back into the office, I was refreshed, and I've been able to stay at the community-need level rather than at the level of approving emails. I'm more attuned and engaged in an intentional level in everything I do."

Are you tired, frazzled, fed up, trying to do too much in too little time and with insufficient resources? Don't quit your job. Consider a sabbatical.

Seek Balance

Brett Andrews, executive director of the Positive Resource Center (**www.positiveresource.org**) in San Francisco, and his board had been discussing sabbaticals for several years. "It was around the occasion of my 10th anniversary here. The board members said they enjoyed working with me and wanted to make sure I wanted to continue working with them," he recalls. "The discussion was about a sabbatical for me and a sabbatical policy for the organization, which made it a much more balanced conversation."

By the time Andrews took his three-month break in the spring of 2015, the organization had developed a policy that allows everyone at every level of the organization to take a sabbatical. "Different policies have different requirements," Andrews explains. "Ours is a retention strategy. You're not going on sabbatical because you worked here for seven years and you earned it. You're going because we want you to be here for another seven years."

Andrews had been in his position for 12 years and was ready for a break. "My job is very enjoyable for me, but my work/life balance was out of sync. I wanted to create a good separation between Brett Andrews, the executive director, and Brett Andrews, the person in the world."

He went into the sabbatical with a deliberate strategy: "to be as agenda-free as possible." In addition to increasing his gym attendance and meditating, he traveled to Puerta Vallarta, visited friends and family back East and reactivated his social life. He also got back in touch with his creative side, continuing with voice lessons and revisiting poems he had written 25 years earlier.

Andrews also became very intentional about finding ways to manage the stress of his job. "I worked very hard on mindfulness, and I actually created a couple of indicators for myself to notice when I'm stressed in the office. Now I play music, which soothes me, or take a walk and get a coffee. It's OK to just stare into space for a few minutes if that's what I need to do."

Not only did Andrews return with a fresh outlook on his own leadership role, but he also saw how his absence produced benefits among his staff. "The sabbatical allowed—if not forced—me to let others make decisions that were in the best interest of the Positive Resource Center," he says. "I also realized that being a part of every conversation is not the best use of my time and may even thwart 'stretch thinking' within the senior management team. The sabbatical not only allowed my senior management team to take greater responsibility, which is a professional development opportunity, but it also gave them a chance to see how a decision made in one department could, and most likely would, have an impact on other departments, if not the whole agency. Since I have returned, I am pleased to say that I have been able to maintain this new level of engagement, and my senior management team is thriving."

For others who may want to consider a sabbatical, Andrews highly recommends approaching it from the retention angle. "I would encourage every executive director to go into a conversation with the board with a preliminary plan and say, 'I want to stay, and in order for me to stay, I think I need a break.' Go in with a draft plan of how things would work in your absence. It telegraphs that 'This is about us, not about me. This plan will allow the organization to move forward and function while I'm away.'"

Pursue Passions

Patricia Lonsbary, CFRE, major gift officer at the American Red Cross of Southwestern Pennsylvania (**www.redcross.org/local/pa/pittsburgh**) in Pittsburgh, was a consultant for Ketchum Inc. when she decided to take a different kind of sabbatical. About a year earlier, her husband, who had a private executive motor coach company, suggested that they sell their house and launch their own travel adventure. "It was a drastic proposition, and I wasn't ready for it," she admits.

However, during one business trip, while she was enduring a layover after a delayed flight, with no idea of when she would get home, she had an epiphany. In the airport bookstore, she saw *The Career Break Book: Swap your briefcase for a passport and live your dream*. She bought it, read it, then later told her husband, "I'm so ready."

She explained to her boss at Ketchum that it was a good time for a break, as she had successfully concluded campaigns for two clients and did not want to take on any new projects. "He told me the door would be open if I wanted to come back, but at the time, I didn't know if I would go back. I was at a fabulous point in my career, but I was ready to take the leap. I had always wanted to be a travel writer, and that was probably the first time in my life that I was able to focus on the two things I truly love to do: travel and write."

With no itinerary except the desire to go only to places they had not visited before, Lonsbary and her husband set off. The couple traveled 28,000 miles in two years while she blogged and wrote pieces for *Escapees Magazine, Family Motor Coaching Association Magazine* and CNN iReport. She also did some spontaneous pro bono consulting for people she met along the way. "I stayed in touch with my Ketchum friends and stayed engaged with AFP, keeping myself in tune with what was happening. I think it's very important that you maintain your skills and contacts with people in the business."

At the end of two years, when she decided it was time to go back to work, she secured a position as global philanthropy manager for UNICEF in Geneva, Switzerland. She and her husband gave up the motor coach, crossed the ocean and lived in Switzerland for four years.

When Lonsbary's mother's declining health prompted a return to the United States, she worked as a consultant for Bob Carter Companies before moving on to her current position with the Red Cross. Even though she did not return to the organization she had left for her sabbatical, her time away resulted in a similar type of new focus and energy that Andrews and Hardison experienced. "The time away from fundraising gave me a freshness when I returned to the profession," she says. "I had encountered people of all kinds, many of whom I would not have experienced otherwise. I saw the homeless in the California campgrounds who lived in tents next to my

luxury Prevost [motor coach]. By contrast, I had abundance: food, shelter and more. This inequality reminded me of social need in a real, tangible way, and it stays with me when I ask for funding now to make a compassionate difference.

"Because I encountered the homeless and the hungry, the women fighting breast cancer and the people rebuilding their homes in the Fifth Ward of New Orleans, I saw the 'living case for support,' and it rekindled my passion to find funding support."

Mary Ellen Collins is a freelance writer in St. Petersburg, Fla. (mecollins123@yahoo.com).

Resources

The Career Break Book: Swap your briefcase for a passport and live your dream by Joe Bindloss, Clare Hargreaves, Charlotte Hindle and Andrew Dean Nystrom (Lonely Planet, 2004), paperback, 228 pages

Creative Disruption: Sabbaticals for Capacity Building and Leadership Development in the Nonprofit Sector, CompassPoint Nonprofit Services **www.compasspoint.org/research/creative-disruption-sabbaticals-capacity-building-and-leadership-development-nonprofit-sector**

Escape 101: The Four Secrets to Taking a Sabbatical or Career Break Without Losing Your Money or Your Mind by Dan Clements and Tara Gignac (The Brain Ranch, 2009), paperback, 172 pages

Reboot Your Life by Catherine Allen, Nancy Bearg, Rita Foley and Jaye Smith (Beaufort Books, 2011), paperback, 242 pages

There are various foundations across the country that offer support for sabbaticals in which recipients can decide how to spend their time, including the following:

- The Durfee Foundation Sabbatical Program—**http://durfee.org/what-we-support/sabbatical**
- The Rasmuson Foundation Sabbatical Program—**www.rasmuson.org/index.php?switch=viewpage&pageid=112&highlight=sabbaticals**

Good Fellows

By Mary Ellen Collins

Fellowships are not just for recent graduates who want to learn more about nonprofit careers or for emerging professionals who need some skills development in order to advance. Two unique, state-based fellowship programs take very different approaches to providing experienced executive directors and CEOs with the kind of support that enables them to build on their success and make a significant difference in their communities and in the sector.

A Network of Problem-Solvers

South Carolina's Liberty Fellowship program (**www.libertyfellowshipsc.org**) was started in 2004 as a partnership among founders Hayne and Anna Kate Hipp, Wofford College (**www.wofford.edu**) in Spartanburg, S.C., and Washington, D.C.-based Aspen Institute (**www.aspeninstitute.org**).

"My wife and I have a passion for South Carolina, and we felt we had an opportunity to make an investment," Hayne Hipp says. "We wanted to invest directly into the bloodstream of the state. We came up with the idea of a fellowship, and we modeled ours on the Aspen Institute's Henry Crown Fellowship Program."

Liberty Fellow nominees must be South Carolina residents between the ages of 30 and 45 who are proven leaders in the nonprofit or for-profit sectors, with a history of significant community engagement. Program administrators focus on bringing together a diverse class of 20 every year, representing a cross section of gender as well as geographic, political, social, occupational and ethnic characteristics.

The core of the program is a series of four five-day seminars that are held over a two-year period. Using Socratic roundtable discussions with a moderator, participants share their perspectives on readings that range from Aristotle and Plato to contemporary fiction and writings about current events.

"It's a values-based approach centering on what makes a just society," Hipp explains. "It brings together people from different backgrounds and beliefs in a series of seminars to explore great thinkers and break down the silos that keep us separated. The moderator talks only 15 percent of the time. The discussion is among the fellows. That's where they get each other's perspectives. You learn from hearing what other people in the class have to say."

The overall goal of the program is not to mold new leaders but rather to create a framework that enables existing leaders to work together on behalf of the state. "We had the leaders, but we didn't have the network that allowed them to work together," says Jennie Johnson, chief creative officer of Liberty Fellowship. "There wasn't a way to get to know each other. Now, the fellows make linkages with each other, they build great trust in each other and we're building the capability for South Carolina to utilize existing leaders more effectively."

For the third of the four seminars, the fellows, or "Liberties," join fellows from all Aspen programs worldwide. "The magic of the Liberty Fellowship program is that when the fellows go home from this seminar, 10 days later they're running into each other, so there is constant exposure to and reinforcement of what they learned," Johnson adds.

In addition to the seminars, Liberty Fellows undertake a project designed to have a positive impact on the state, with most people choosing something related to education, public policy, the environment or health. Luanne Runge, executive director of Liberty Fellowship, recalls, "I was a partner in a law firm when I was a fellow, and I wanted to take the opportunity to do something different that I was passionate about. I started a mentoring program between college students and inner-city girls around the subject of teen pregnancy."

RETROROCKET/GETTY IMAGES

Hipp mentions another fellow, a real-estate developer who created a program to teach inner-city youth how to play squash. "At first, I didn't understand why they needed to learn that, but he's teaching them teamwork, they're exercising and he's encouraging them to go to college," he says. "One person with one idea now has a lot of adults involved in the program and has impacted a lot of lives."

The program's success is prompting a few changes, including adding a fifth seminar called "Call to Action," which will focus on how the Liberty network and the state can work together. Feedback that fellows want more opportunity to get together may result in more multiclass gatherings.

"The fellows have a very tight network, but they don't think of getting together as networking," Runge says. "They're getting to know people for who they are and how they can collaborate in order to solve a problem and move South Carolina forward."

Journeys in Self-Discovery

The Bonfils-Stanton Foundation's Livingston Fellows Program (**http://bonfils-stantonfoundation.org/leadership/livingston-Fellowship-program**) honors the memory of John Livingston, a longtime trustee, chair and later chair emeritus. "John Livingston had a powerful interest in leadership when he chaired the foundation," says Gary P. Steuer, president and CEO of the Bonfils-Stanton Foundation in Denver. "There was a focus on it, but we didn't have a formal program. The trustees created this program to reflect his values and commitment to leadership development."

Each year, five executive directors or CEOs from Colorado's nonprofit sector who have proven leadership ability are chosen from between 40 and 100 applicants. Each fellow receives $25,000 to enhance their leadership skills through a two-year, individualized plan that can include anything from travel to meeting with experts in their fields to pursuing an activity that will help them in a particular area.

Once the fellows are selected, they begin to outline their goals, identifying their challenges and what they want to accomplish. "We ask that their initial outline of the plan be done as an infographic that creates a visual representation because that gets them to focus on the big picture," Steuer explains.

During a two-day retreat in July, they meet with Steuer and Jesse King, a consultant specializing in leadership, organizational development and philanthropy who has worked with the program since its inception, who provide feedback on their plans. By the end of the summer, they complete the plan and present it to foundation staff and King for input before getting final approval. "We do allow people to do some 'self-work,'" Steuer adds. "Maybe they want to challenge themselves by climbing a mountain or learning to sing or spending a month alone in a cottage in Ireland. We allow for the fact that leadership goes beyond the skills and is about who you are as a person as well."

The foundation pays the $25,000 award in two installments to each fellow's organization, which acts as his or her fiscal agent. Once a fellow reports that the first half has been spent, the second payment is made.

Rather than setting a schedule that brings participants together on a regular basis, fellows are encouraged to meet on their own and to plug into the larger cohort of past fellows, according to Steuer. "The fellows organize an intensive, three-day retreat every year," he says. "They do everything themselves—decide on a theme, get speakers and plan social activities."

In addition, periodic "leadership lunches" are organized with guest speakers. Recent speakers have included Colorado Governor John Hickenlooper and Richard Blanco, the inaugural poet for the second Obama presidential inauguration.

The freedom to chart their own course has resulted in a wide array of experiences among the fellows. For example, one person who runs a microfinance organization said he never had time to *just think* about his organization or his field because he is so bogged down with running his organization and family responsibilities. He rode his bike across the country, which challenged him physically, and along the way, he met with microfinance leaders. He had time to think and blogged about the experience.

The fellowship experience can be life-changing, as evidenced by Jamie Van Leeuwen, currently senior policy adviser to Governor Hickenlooper. "He wanted to explore how issues of poverty and lack of economic opportunity were dealt with in the Third World, so he went to Uganda and met with service delivery organizations," Steuer says. "It was a transformative experience for him. He had misperceptions and thought his peers also didn't really know how things worked on the ground." The result? In 2009, after winning a Livingston Fellowship, Van Leeuwen founded the Global Livingston Institute (**www.globallivingston.org**), named for Johnston R. Livingston, a Colorado entrepreneur and philanthropist and the Livingston Fellows Program's namesake. He takes groups of students and community leaders to East Africa, encouraging them

to rethink their approach to international development by learning to "listen, think and then act."

The two fellowships have different strategies but a common goal: to lift up proven leaders and arm them with the connections, information and experiences that will move them from success to significance.

Mary Ellen Collins is a freelance writer in St. Petersburg, Fla. (mecollins123@yahoo.com).

Resources and Additional Reading

American Express–Aspen Institute Academy 2.0: A Fellowship for Emerging Nonprofit Leaders
www.aspeninstitute.org/policy-work/nonprofit-philanthropy/leadership-initiatives/fellowship-emerging-nonprofit-leaders

"DIY Leadership Development"
http://ssir.org/articles/entry/diy_leadership_development

NGen: Moving Nonprofit Leaders From Next to Now
www.independentsector.org/ngen

"The Nonprofit Leadership Development Deficit"
http://ssir.org/articles/entry/the_nonprofit_leadership_development_deficit

Nonprofit Leadership Development Tool Kit
www.bridgespan.org/Publications-and-Tools/Leadership-Effectiveness/Nonprofit-Leadership-Development-Toolkit.aspx

Nonprofit Leadership Development: What's Your "Plan A" for Growing Future Leaders? by Kirk Kramer and Preeta Nayak (CreateSpace Independent Publishing Platform, first edition, 2013), paperback, 166 pages

"Preparing the Next Generation of Nonprofit Leaders"
http://ssir.org/articles/entry/preparing_the_next_generation_of_nonprofit_leaders

Ready to Lead? Next Generation Leaders Speak Out
www.compasspoint.org/sites/default/files/docs/research/521_readytolead2008.pdf

Leadership and Philanthroculture

Lilya Wagner, Ed.D., CFRE

"Life is like a jigsaw puzzle, but you don't have the picture on the front of the box to know what it's supposed to look like. Sometimes, you're not even sure if you have all of the pieces."[1] This comment is taken from a timeless volume, *A Whack on the Side of the Head,* by Roger von Oech, who believes that there are two main phases in the development of new ideas: an imaginative phase and a practical one. The motto of the first phase is "thinking something different," and the motto of the second phase is "getting something done."[2]

Nonprofit leaders, including fundraising professionals, are required to engage in both phases. They must accomplish goals and meet expectations, and yet they also must be creative in managing their programs because of the dynamic state of the profession.

A leader is one who breaks new paths into unfamiliar territory, recognizes a problem before it turns into an emergency, is reasonable and calm, submerges himself or herself in the fountain of the people, implements noble ideas, is practical and a realist, is a visionary and an idealist and, sometimes, is the wave pushed ahead by the ship![3] Real leadership has never been about authority, positions of power or dogmatic dictatorship. It is about listening, valuing, following advice and bringing people together for a common goal and vision. These traits are also vital for understanding the differences and valuing them when interacting with diverse constituents. In other words, putting together leadership traits appropriate for today's nonprofit world means combining philanthropy and cultural diversity, resulting in what may be termed "philanthroculture," to follow von Oech's suggestion of "thinking something different."

Fundraising is a noble profession that takes a person beyond mere technique to a higher plane of thought and action. The ideal professional is one who thinks about what needs to be done, implements principles instead of following technical blueprints and has an ethical basis for what is done.

Any leadership skill at any level requires thinking in new, creative, innovative and different ways. Consider this: In the winter of 333 B.C., Alexander the Great arrives in Asia and settles down for the winter in the city of Gordium. Alexander hears the legend of the Gordian knot: Anyone who can untie this odd and complicated knot will be king of Asia. Alexander asks to see the knot and studies it for a bit. Certainly, it is complicated and has him baffled. After some reflection and frustration, a bright idea dawns. He whips out his sword and slices the knot in half. Asia is his.

TODD DAVIDSON/ILLUSTRATION SOURCE

Nonprofit leaders and fundraisers follow good rules, but sometimes you have to look beyond the expected and challenge the status quo. You have to cycle out obsolete ideas and cycle in new ones that help you look at traditional concepts and principles in new ways. That is the way it is with leadership. As von Oech said, "Life is like a banana. You start out green and get soft and mushy with age. Some people want to be one of the bunch, while others want to be top banana. You have to take care not to slip on the externals. And, finally, you have to strip off the outer coating to get at the meat."[4] And Victor Hugo said, "There is one thing more powerful than all the armies of the world, and that is an idea whose time has come."[5]

The time has come for all nonprofit leaders, which includes fundraisers who must practice "leading up," to not only engage in new ideas but also go a step further, as advised by von Oech, and get something done.

In the May 2013 *Harvard Business Review,* an article by Gregory Unruh and Ángel Cabrera proclaimed, "Join the Global Elite. Managers with a cross-cultural perspective are in high demand." In discussing the immediacy and opportunity of acquiring cross-cultural expertise in management, the authors went on to say, "You've read about and admired them, maybe met some of them. You've certainly benefited from their work, the growing elite of global businesspeople who are helping to define today's international commerce. They are creating immense value for their companies and themselves—and, in many cases, making the world a better place."[6]

Certainly, this also has become increasingly true and appropriate for nonprofit organizations and their fundraisers. If you were to put the above into the nonprofit context, the paragraph might read like this: "Fundraisers with a cross-cultural perspective are in high demand. You've read about and admired them, maybe met some of them. You have certainly benefited from their work, the growing elite of global fundraisers who are helping to define today's international philanthropic and fundraising practice. They are creating immense value for their organizations and themselves—and, in many cases, making the world a better place."

At the turn of this century, and even in the late 1990s, nonprofit and philanthropic leaders began to take careful note that knowledge of and attention to diversity in philanthropy and fundraising were not just add-ons to our professional practice but a "must," beneficial for the relationships between nonprofits and their constituents in many ways. More recently, Emmett D. Carson, Ph.D., CEO and president of the Silicon Valley Community Foundation (**www.siliconvalleycf.org**) in Mountain View, Calif., stated, "Charities that don't recognize demographic trends are going to shrink and ultimately go out of business. The populations in the past that have supported them spectacularly will not have the size to support them going forward. As a result, over time, these charities must adapt, change or die."[7]

Professionals today, whether leaders of nonprofits or fundraisers, have become more aware of the available information that can guide practice and are more conscious of cultural bases and biases. Books have been written that contain country-by-country accounts of global philanthropy, and there is at least verbal adherence to and respect for differences in philanthropy that guide differences in fundraising methods. At the same time, however, there was still reason to write as recently as 2012, "Charitable giving in the U.S. quickly is becoming more ethnically, culturally and socioeconomically diverse, yet conventional philanthropy has not fully recognized, embraced and partnered with communities of color and needs to understand and support their philanthropy if it wants to drive social change."[8]

Indeed, instead of ignoring or thinking of change as something that adds to the workload, nonprofit leaders and fundraisers can acknowledge, work with and tap into the rich diversity that exists. There is much potential for income for nonprofit organizations, as well as the corollary benefits of increased loyalty to an institution, resolution of differing views that ultimately strengthens an organization and the positive image engendered by increased advocacy by the diverse populations a nonprofit influences and serves.

Respect and acceptance of differences can enrich both individual and collective experience and also, when it comes to nonprofits and the philanthropy that supports them, result in greater viability and sustainability of the organizations that make up our civil societies. This includes ethnic groups in North America who have brought cultural differences and traditions from many countries. These shape generosity and volunteerism. In the 21st century, you can readily see that the philanthropy of women, ethnic populations and youth has substantial influence on traditional philanthropic practices and institutions. Consequently, fundraisers find that in order to be successful, they must tailor their appeals to the prospective donors' customs and sensibilities.

Professionals today, whether leaders of nonprofits or fundraisers, **have become more aware of the available information that can guide practice** and are more conscious of cultural bases and biases.

Diversity goes much beyond acknowledging and including ethnic groups or diverse populations or minorities—depending on **how one wishes to define differences.**

Seeking diversity in a nonprofit's outreach, including asking for funds, is not just the right thing to do but is also profitable for the cause. As nonprofit leaders experience an increased demand to adjust their fundamental practices to accommodate the cultural styles, norms and preferences of the cultures wherein they operate, they find that diversity extends farther than had been envisioned.

Diversity goes much beyond acknowledging and including ethnic groups or diverse populations or minorities—depending on how one wishes to define differences. When defining how various businesses approach diversity, Deloitte's national managing director of human resources stated, "We go beyond the usual things to talk about, things like value system, language, geographic experience and location, working style, thinking style, educational background, involvement in the military, socioeconomic class, religion—all the things that make up the dynamics of who we are."[9] The proactive nonprofit leader and fundraising professional would do well to consider this approach to diversity in enabling philanthropy from diverse population groups. It certainly is similar to excellent prospect research practices, with the cultural layer receiving considerable attention.

In *Racial, Ethnic and Tribal Philanthropy: A Scan of the Landscape*,[10] the author suggests that cultural competence is fundamental to understanding and supporting philanthropic engagement. Cultural competence suggests an awareness of one's own culture and awareness and acceptance of others' cultures. However, many fundraisers still approach a relationship and solicitation from their own perspectives, therefore leaving themselves unprepared for cultural differences that can easily be misinterpreted and misconstrued.

In putting into practice the concept of philanthroculture, fundraising professionals need to consider variations on donor approaches, including one-on-one solicitation, direct mail, use of the Internet and telephone solicitation. Prospect research strategies must be redefined to capture information that is relevant and suitable to diverse donor identification and cultivation. Volunteers representing various ethnic groups will need to be recruited and trained. And, most importantly, the question of how people give and why people behave in altruistic ways must be considered.

While generalizations should be approached with caution, they can be useful as a foundation or starting point because they draw attention to unique characteristics in certain categories of generosity behaviors that fundraisers should observe and use to adjust the funding request appropriately.

- Direct, informal support to children, the elderly or community members is more common than support of institutions.
- The level of immediate need is a major consideration in giving. Immediate needs take precedence over long-term planning.
- Planned giving is seldom a priority.
- There is some distrust of traditional nonprofit institutions related to a perception that these have not met minority needs.
- There is some distrust of traditional forms of giving.
- And individual cultures within minority groups do not always agree on philanthropic priorities and interests because of their varying histories and experiences.[11]

Adding to these, the effect of recency of immigration versus long-term stay in the United States or other countries, as well as diaspora philanthropy, may cause astute nonprofit leaders and personnel, including fundraisers, to feel a weight of "too much to know." Nevertheless, experience now indicates that these cultural differences in practicing philanthropy must be considered in successful fundraising programs.

Nonprofit organizations have a stellar opportunity to increase giving from diverse groups now and in the coming years. Your organization will have numerous opportunities to understand and interact with rich differences in languages, values and cultural practices. It is a movement away from homogenizing everyone to accepting and embracing cultural richness in our

lives. As Susan Raymond, Ph.D., executive vice president, and Mary Beth Martin, Esq., senior managing director, of Changing Our World Inc. (**www.changingourworld.com**) in New York City, concluded: "The increasing richness of American society offers an opportunity for nonprofit engagement unlike any in the recent past. It is an opportunity to grow and evolve and to become more relevant in a changing world. Understanding and engaging the richness of increasing cultural diversity will be the prerequisite for successful fundraising strategies."[12]

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Time, the Avenger

By Martha H. Schumacher, ACFRE, CFRE, MInstF (AdvDip)

After presenting "Challenging Conversations in a Changing Philanthropic Landscape" with Andrea McManus last March, I had every intention of writing a blog post about the inspiring AFP international conference in Baltimore. I was going to share, highlight and applaud!

Then work, volunteer commitments, family and out-of-town guests took precedence, eating away at my good intentions. Before I knew it, more than a month had flown by. It got me thinking. If someone like me, who prides herself on being a strong time manager, can get thrown off track from time to time, I'm probably not the only one.

So, I decided to refresh myself and then share with you my top 10 time management tips, plus four productivity apps. These essential tools got me back on track, and I am confident that they will do the same for you, whether it is spending more time with major donors and major-donor prospects or other key priorities.

1. Prioritize ruthlessly.
www.entrepreneur.com/article/231520

2. Do not fall victim to the "tyranny of the urgent" and lose focus.
http://virtualproductivitysolutions.co.za/be-more-productive-avoid-the-tyranny-of-the-urgent

3. Write in the morning. This is when your brain is freshest, and it will be easier to check that report, memo, letter or email off your list. If you wait until later in the day, there will be inevitable distractions, and it will be harder to concentrate (see point No. 2).
http://writetodone.com/how-to-write-first-thing-in-the-morning

4. Brutally evaluate your schedule, reducing the number of meetings you attend. Are you showing up to your standing meetings out of habit? Do you need to be at every single one of these meetings every week?
http://quickbase.intuit.com/blog/2014/06/18/attending-too-many-meetings-at-work-heres-the-cure

5. When you do have to attend the meeting, assess beforehand whether you need to be there the whole time. Making an appearance or sitting in on the relevant section are ways to buy back countless hours of your precious time.

6. Carve out at least two hours each week for major-gift fundraising activities. For example, book two one-hour morning time slots on your calendar every week (e.g., Tuesday and Thursday, 9–10 a.m.). NOTE: The following is one of my favorite articles because it spells out the difference between being busy and being productive:
http://goinswriter.com/shave-time

7. Then, do the same for/with your CEO, board members and other key stakeholders.

8. Return calls to your talkative donors, board members, etc., at 9:45, 2:45, etc. Let them know that you have a commitment in 15 minutes and that you wanted to make sure you returned their important call as quickly as possible. Like point No. 2, this will buy back significant time.

9. Time box your activities. For more information about time boxing, read the fifth item in the following article:
www.lifehack.org/articles/productivity/13-strategies-to-jumpstart-your-productivity.html

10. Prioritize reading emails from key donors, your boss and direct reports, and do so only at the beginning and end of your day. The new term for the urge to immediately respond to emails is "workplace telepressure." Here is an interesting recent article about how this behavior is unproductive and can be hazardous to your health:
www.huffingtonpost.com/2014/12/01/work-email-health_n_6226912.html

MARK SHAVER/ILLUSTRATION SOURCE

And here are four useful productivity apps from a recent issue of *Inc.* magazine (**www.inc.com/magazine/201503/get-more-done-4-great-productivity-apps.html**):

- *The Icukoo Charity Alarm Clock* app lets you create and edit alarms. Bonus: If you ignore them, the nonprofit of your choice will benefit! **https://itunes.apple.com/gb/app/icukoo-charity-alarm-clock/id925767139?mt=8**
- *Workflow* turns tasks into buttons for your phone's home screen, making tedious activities one-touch operations. **https://workflow.is**
- *IFTTT* (If This, Then That) automates smartphone apps using "recipes." **https://ifttt.com**
- *Timeful* app (now part of Google) sends timely reminders about doing things you might otherwise forget or ignore, such as stretching if you've been at the computer too long, going to the gym, etc.

And If You Have Time ...

Eat That Frog!: 21 Great Ways to Stop Procrastinating and Get More Done in Less Time by Brian Tracy (Berrett-Koehler Publishers, 2007), paperback, 128 pages

Time Management from the Inside Out, Second Edition: The Foolproof System for Taking Control of Your Schedule—and Your Life by Julie Morgenstern (Holt Paperbacks, 2004), paperback, 304 pages

So, are you still reading, or did you run out of time?

Happy time management, and may you, your major donors and your organization benefit from your newfound time!

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Maximum Capacity: Establishing Common-Sense Metrics and Deliverables for Prospect Research

By Bond T. Lammey and Catherine Cefalu

At times, prospect research can feel a lot like a fast food restaurant: The more prospects with capacity ratings, the better. However, this emphasis on volume at the expense of content reduces a researcher to an unthinking cog in a machine instead of a valued partner in fundraising. It leads to overworked researchers, underinformed development officers and poor outcomes for your organization's fundraising campaign.

- The value of prospect research is to provide strategic, relevant and accurate information. Is your organization correctly measuring that value in your metrics?
- The impact of research is on the entire campaign cycle, not just the beginning. Is your organization correctly measuring that impact in your metrics?

Stressing the correct metrics not only lets you obtain comprehensive data on the work done by prospect research but also allows you to set more realistic goals. Note that "realistic" is not the same as "unambitious." Ambitious goals have meaning only if they are feasible. (For example, attempting to capacity rate all 50,000 unrated prospects in the database, as the comic on page 58 demonstrates, would not fall under the heading of "feasible.")

Shifting the emphasis away from volume is only half of the solution. The other half is tailoring your deliverables to the needs of their users. For an initial visit with a prospect, it is not necessary to provide a full and detailed capacity rating with every known indicator of wealth. By reducing the scale of a deliverable for an initial visit, researchers can provide more useful information, structure their time more effectively and identify more major-gift donors. The idea is to increase volume strategically rather than "work for work's sake."

Baseline-Capacity Ratings

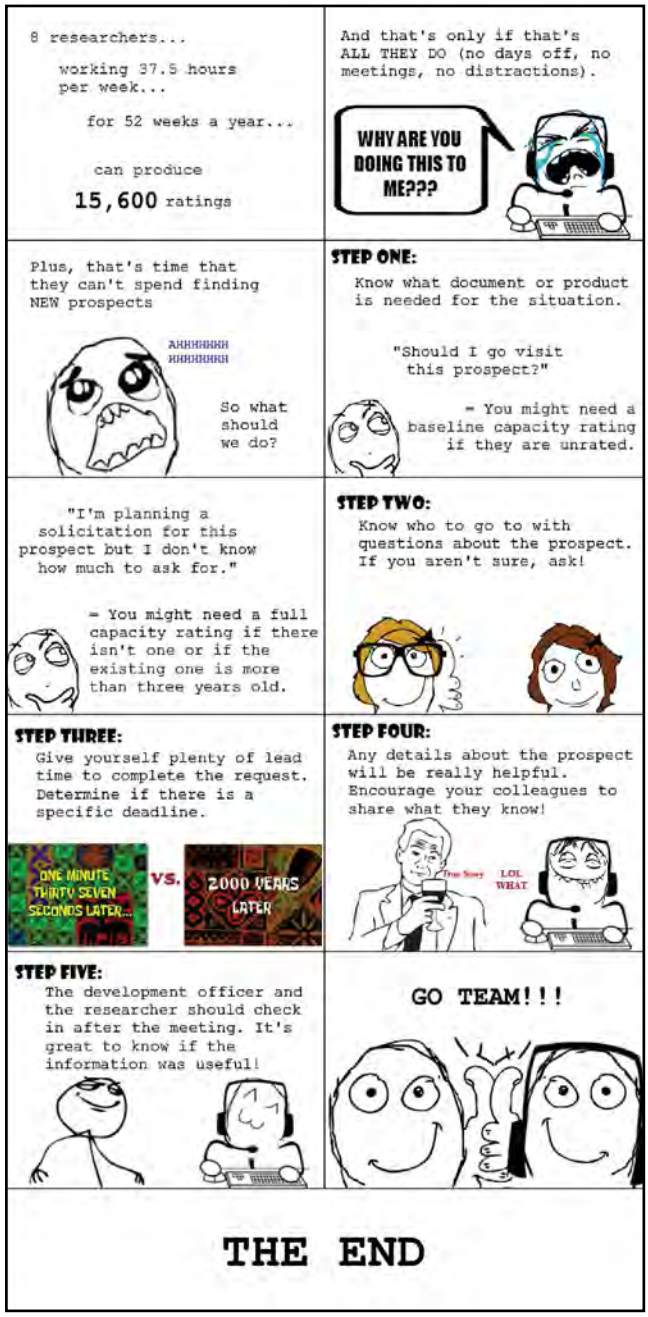
Instead of a full-capacity rating to identify prospects, what you can do is a baseline-capacity rating. This deliverable bases a capacity rating on a single indicator of wealth rather than on multiple ones.

DENNIS HARMS/ILLUSTRATION SOURCE

A typical baseline-capacity rating includes the following components:

- Rating range
- Rationale for the rating
- Biographical information
- Broad interest information

An example: "Mr. Smith's initial capacity rating is $500,000–$999,900, based on the estimated market value of his $5 million, 10,000-square-foot home in Houston. Mr. Smith began his career at FifthThird Bank in risk assessment. In 2010, he founded his own venture capital firm, Blue 53, which has grown to five active funds and 131 employees. He is a trustee of the City Memorial Children's Hospital."



That should be enough information to recommend a prospect to a gift officer. Additional ad hoc questions could be answered in preparation for a visit. (See Table 1 on page 59.) The core components of a baseline-capacity rating can be adjusted for the needs of your organization. A good rule of thumb is that a baseline rating should take no longer than an hour to complete—a big difference from a typical full-capacity rating.

One concern you may hear when introducing a baseline-capacity rating is that researchers are now ignoring accuracy in favor of speed. However, this concern misses an important distinction between the two types of ratings: what these ratings are being used for. For example, the question a baseline-capacity rating answers is, "Is this prospect worth a visit from a gift officer from my organization?" A full-capacity rating answers the

Table 1.

WHEN I NEED TO:	I WANT TO KNOW:	RESEARCH DELIVERABLES:
Identify the prospects	People who may support our cause. Is there a connection to our organization? Do they have capacity? How do I get in touch with them?	List of prospects who have supported similar causes. Relationships with current donors and volunteers. Baseline-capacity rating. Answer a specific question. Valid contact information.
Qualify the prospects	To what area may they want to give?	List of gifts to similar organizations, board memberships. Other known prospect interests. Answer a specific question.
Cultivate the prospects	What else have they supported? Can anyone help us develop a stronger relationship with them? When is the right time for an ask?	List of gifts to similar organizations, board memberships. Other known prospect interests. Answer a specific question.
Solicit the prospects	How much should I ask for? Are there any red flags before I ask?	List of gifts to similar organizations, board memberships. Relationships with current donors and volunteers. Alerts on wealth events. Answer a specific question. Full-capacity rating.
Steward the prospects	Can they connect me with anyone else? When could I put them back into the cultivation cycle?	Relationships with people of influence and other prospects. Alerts on wealth events. Answer a specific question.

question, "Given the publicly available information on this prospect's wealth indicators, what would be a realistic solicitation from my organization?" Baseline-capacity ratings are done with the expectation that they will be revisited at some point later in the development cycle.

Another great use of baseline-capacity ratings is to verify the results of a vendor wealth screening. Wealth screenings can assess more individuals than a researcher can, but the results must be verified afterward. Too often, wealth screening information is either entered into the database and forgotten or never entered into the database at all (yikes!)—and what good are the screening results then? By completing baseline-capacity ratings on the top prospects identified in a wealth screening, you can make the best use of your organization's resources.

Think Like a Development Officer

So, now you have established another deliverable—the baseline-capacity rating—and you have shortened the amount of time it takes for research to initially qualify

Prospects are complex individuals, and development officers are being asked to view them as such. Your role in prospect research is evolving to reflect these complexities. **You must be flexible in your deliverables and in the way you interact with the front line.**

prospects in preparation for a visit. The next challenge is determining if there is enough variety in your research deliverables. To continue the fast food analogy, do not go from a kid's meal to super-sized with nothing in between. You need a full menu of deliverables. It is time to think like a development officer.

First, you need to define prospect stages. Your stages may look something like the named ones below, along with a short description of what the stage means. Even if the titles are different, the concepts should be the same. If you don't have stages, talk to IT (information technology) or your database provider about how you may access them.

1. **Identify:** Receive assignment; contact donor.
2. **Qualify:** Determine if an individual is a viable prospect at the level of the development officer assigned.
3. **Cultivate:** Deepen the relationship, and move the prospect closer to solicitation.
4. **Solicit:** Finalize solicitation details, and make the ask.
5. **Steward:** Acknowledge and steward the gift; determine the status and duration.

Now you are turning chaos into order! All of the prospects in your development officers' portfolios should be in one of these stages. Rather than asking the development officer to figure out what product he or she needs, why not target specific research questions to each stage in the development cycle? Table 1 can be helpful in developing and targeting research deliverables based on prospect stage.

Show the chart to your development officers, and see if it resonates. In particular, pay attention to how they respond to the middle column. They are experts in cultivating the relationship with the prospect. However, when it comes to deliverables, keep in mind that you are the expert. You wouldn't take your car to the mechanic and then tell them how to diagnose and fix the problem, would you? You want development officers to be able to communicate what they need. From there, you can determine the best way to develop an answer to their questions. There will certainly be times where there are exceptions to the rules, and the more flexibility you have built into your system, the more able you will be to accommodate exceptions.

Establishing Metrics

Let's assume you have gained approval to customize research deliverables in a manner similar to those described in the grid. (Admittedly, this may be a big assumption.) You'll next want to quantify how long it will take, on average, to complete each type of deliverable so you have some idea of how to attach a metric to the deliverable. Many research shops struggle with this idea because research deliverables can take so many different forms. Can you track the number of emails a researcher sends to the front line in response to specific prospect questions? Many organizations track this via a research request log within the database, where development officers must submit requests for consideration. Others have researchers track requests once they come in via an access database or project management system. Some have set up a report within their database that pulls from an audit trail. For example, you could run a report to see how many teams Researcher A has updated addresses for in the last month or how many news articles Researcher B has uploaded.

One data point that is gaining popularity is the initial identifier of a prospect. If a name was introduced as a major-gift prospect via a predictive modeling project, for example, tracking the original data source can help demonstrate the return on investment of this project. Many organizations track this via a specialized prospect assignment type in their database.

We recommend codifying data points within your database whenever possible, rather than uploading Word documents, so you can retrieve them at a later date. Let's say you work at an animal welfare organization.

Wouldn't it be helpful to be able to run a report of all terrier owners for a targeted appeal? What if you are $100,000 short of meeting your matching gift goal on a challenge grant? It would be helpful to be able to run a report of all known stockholders who may have more liquid assets available to divest in support of your cause. You can even go a step further, if your system has this functionality, and create automated research reports out of your database from these data points.

As you establish metrics related to these data points, be sure to scale them appropriately. For example, you would expect the metric related to uploading news articles to be much larger than the metric related to entering full-capacity ratings.

Prospects are complex individuals, and development officers are being asked to view them as such. Your role in prospect research is evolving to reflect these complexities. You must be flexible in your deliverables and in the way you interact with the front line.

We hope this article has given you some ideas of how prospect research within your organization can work smarter, not harder.

Note: The article "Maximum Capacity: Establishing Common-Sense Metrics and Deliverables for Prospect Research" by Bond T. Lammey and Catherine Cefalu was originally published in the Q3 2014 issue of *Connections*, the flagship publication of the Association of Professional Researchers for Advancement (APRA, **www.aprahome.org**), and is reprinted with permission.

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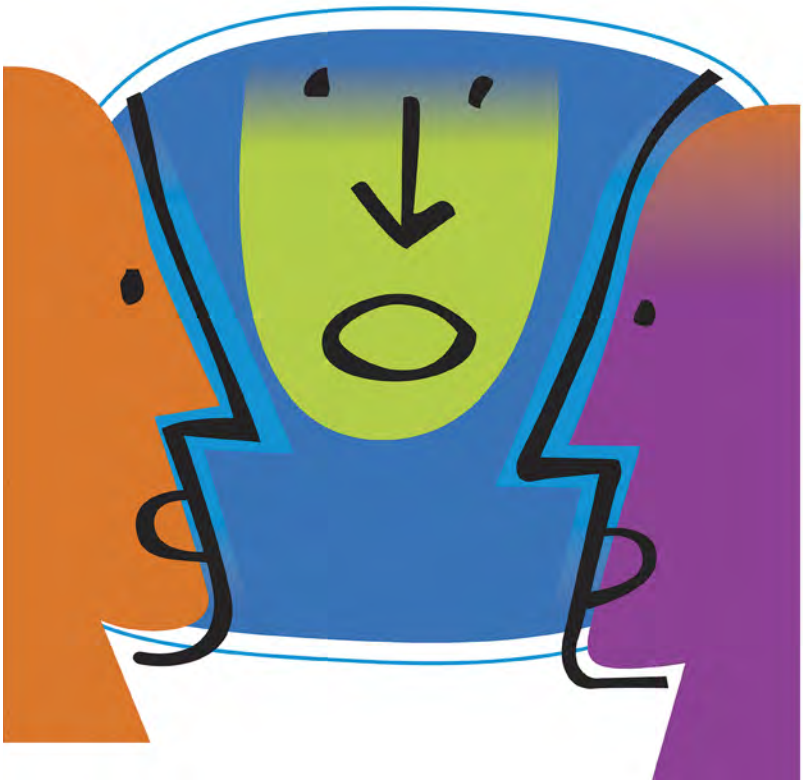
Building a Bridge Between the Hard and Soft Sides of Legacy Giving, for You and Your Donors

By Kimberley MacKenzie, CFRE



DOUG ROSS/ILLUSTRATION SOURCE

Do you avoid legacy-planning conversations because you are worried you may not know enough? I suspect the overwhelming majority of fundraisers would admit that they are like I used to be: timid about discussing legacies for fear they may not be able to answer some of the more technical questions.

Many generalist fundraisers, like me, fall into this business because we are driven by a passion to change the world, not because we have a fondness for the intricacies of gifts of insurance. So, are we still qualified to talk to our donors about their estate plans? Absolutely.

There are two very different perspectives in this business of planned giving. There are the warm-fuzzy fundraisers who like to visit their donors for tea and perhaps shed a tear or two. Then there are those who like to keep things less emotional, meet at the office and go into detailed explanations about the ins and outs of complex planned-giving mechanisms.

We most definitely have a "soft" and a "hard" side to gift planning.

I sit very comfortably on the soft side. I often get teary-eyed with my donors, and sometimes I cry quietly in my office when I read a will. When I called a donor in response to a note he had written in the hopes of planning a visit and his wife told me he had died the month before, we cried together. For me, working with donors to plan the end of their lives is a deeply moving and emotional experience. I can't think of any greater privilege.

However, think of how your donors are feeling. They can't choose a hard or a soft side. They have to function with both.

I believe it is our job to help build a bridge for our donors between the harder aspects of estate planning and the softer, more emotional side of planning for their own deaths. This belief has recently been affirmed for me on two occasions. Both involved an only child, and the stakes for the donors were much higher for that reason.

Mr. Jackson's Story

Mr. Jackson* called me to discuss leaving a gift to our organization in his will. He had a fairly specific idea about what exactly he wanted his bequest to accomplish, and he was anxious to finalize his estate plans. He wanted to move everything forward very quickly.

In spite of my offer to go and visit, Mr. Jackson preferred to come into the city. In his early 80s, he was still able to manage the hour-long drive to downtown Toronto. So, there we sat, in our boardroom, looking at maps. As I listened to Mr. Jackson talking to our program

I believe it is our job to help **build a bridge for our donors between the harder aspects of estate planning** and the **softer, more emotional side of planning for their own deaths**.

director, I started to worry that this gift was going to be too restrictive. The conversation was going around in circles, and I was no longer sure where it was heading.

And then it occurred to me. The hard and soft sides of gift planning were all muddled up—for Mr. Jackson. We had to shift gears.

After a few open-ended questions, I learned his wife was going to have surgery the following day, that they were going to move soon and that he had been researching nursing homes. His son was in the social services system and would require daily care for the rest of his life. Consequently, their only child was unable to help. I also learned that he was a little tired and that he loved orchids.

The way forward suddenly became very clear. This is what I said: "Mr. Jackson, I think we may want to tackle this in two different ways. First, let's prepare you for the visit with your solicitor next week by deciding how to talk about this bequest in your will. It works better for us to keep the gift designated to the program you like generally, rather than to be too specific, since we don't know exactly what our priorities will be many years down the road. Does that sound OK with you?"

"Yes."

"Secondly, let's talk specifically about a place that you love. We have a nature reserve with over 16 species of rare orchids. People travel for hundreds of miles to come and see them. We could thank you for your gift by putting a bench in a quiet place for people to sit and enjoy the orchids. Furthermore, we could do that now so that you can go and find some peace of mind there. Does that sound OK with you?"

Mr. Jackson's eyes glistened, his face softened and he took a deep breath and said yes, he would like that very much. We then proceeded to tackle the hard side and soft side of Mr. Jackson's estate plans together.

Mrs. Smith's Story

A few months into my current job, I had to write a thank-you letter to go with a receipt for the payment of an insurance premium. I had absolutely no idea what this was about.

In the red estate file, I saw letters from solicitors and a really thick insurance policy. Upon the death of Mr. and Mrs. Smith*, our organization would be the beneficiary of $1 million. With that money, we would create a nature reserve in the name of "Jim Smith."

I was in over my head. Without any background or context, it was probably best to write the letter and send the receipt as had obviously been done the year before.

The following year, I had to write the thank-you letter again.

Having been on the job for a while, I had time and the mental space to become more curious about this annual transaction. I went back to the file and learned that "Jim Smith" was the deceased son of Mr. and Mrs. Smith.

This year, the tax receipt would be delivered in person.

Mrs. Smith was very pleased to welcome me into her home. We looked at her garden, talked about her dog and settled in with a hot cup of tea and some cookies. At one point, I asked, "Can you tell me about Jim? Is it OK to talk about him?" Not only was it OK, but it was welcome. Mrs. Smith told me about her son, who died tragically at the age of 19 from a rare form of bone cancer. We talked about his long battle with cancer, his friends, his funeral and all the kids who came to it. We talked about the hole that Jim's death left in their lives, as he was their only child. I learned about a boy who had good marks in school, who had a lot of friends and who loved nature. In fact, once, Jim stopped a car full of teenagers to help an injured bird on the side of the road.

Mrs. Smith and I did more than share a cup of tea that day. We also shared a few tears while looking at pictures of her son.

On my way home, I realized that every time Mrs. Smith writes a check for the premium on that life insurance policy, she remembers and grieves for her son. Her connection to our charity is a way to keep his memory alive. Knowing that one day a piece of nature

Gather some basic legacy information, as well as a few good advisers, **find a mentor and jump in now. You will be glad you did.**

in Ontario will be protected forever in his name will be a living legacy for Jim.

There was so much more to this red estate file than a thick insurance policy and letters from solicitors. When I got back to the office, I phoned Mrs. Smith and thanked her again for her time. I explained that the estate file was pretty dry reading and asked if she would consider writing down Jim's story and sending us a few pictures. That way, everyone who came across this file would know how very important the thank-you letter is. Of course, she was very happy to comply.

The legacy program in my organization is extremely active this year, with well over 20 confirmed bequests in the past four months and six conversations with donors about their estate plans in just a few weeks.

It was time for me to learn more about the technical aspects of planned giving. So, I attended my very first Canadian Association of Gift Planning (**www.cagp-acpdp.org**) national conference. Sitting in Frank Minton's session (Frank Minton is senior adviser at PG Calc), I felt humbled and inspired. I also felt reassured that I am pretty good at the soft side of legacy fundraising.

I hope we all can start to be more intentional about building a bridge between the hard and soft sides of gift planning, regardless of which side you are starting on.

The hard side of fundraising does address the intellectual aspects of how to reduce the taxes on an estate so that our donors can leave more money to their families and to charities. We do need to have a basic understanding of the options available when a dialogue with our donors about their estates begins. However, I believe that really successful fundraisers aren't successful because they understand how to eliminate taxes on an estate. I believe fundraisers are successful because they are empathetic, emotionally intelligent and able to move beyond the intellectual aspects of gift planning to the emotional side of planning for the end of life.

The decision about which charity to choose at that time isn't one that can be made from the head. It is one that is made from the heart and from the soul. A more important part of my job, and I believe yours too, is to offer our donors understanding and hopefully some peace of mind, knowing that their values will live on.

Please don't wait until you understand charitable gift annuities before you start talking to donors about their estate plans. Gather some basic legacy information, as well as a few good advisers, find a mentor and jump in now. You will be glad you did.

**Names have been changed to protect privacy.*

Note: This article originally ran in *Gift Planning in Canada* (April 2011) and is reprinted with permission.

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"Building a Bridge Between the Hard and Soft Sides of Legacy Giving, for You and Your Donors" is just one of the exhibits, articles and resources available at no charge on the SOFII (Showcase of Fundraising Innovation and Inspiration) website (**www.sofii.org**). For more information and free SOFII updates, contact Carolina Herrera, SOFII project manager, at **carolina@sofii.org**.

Exceeding Expectations

By Lynda McDaniel

Imagine thanking your donors in a way that not only honors their giving but also increases their contributions and commitment to your cause. Furthermore, picture creating an environment that radiates your organization's mission and compels potential donors to exclaim, "We *have* to be part of this!" That's what artfully crafted donor walls can deliver.

"This approach to donor recognition represents a brand new paradigm," says Karen Singer, whose Philadelphia-based company Karen Singer Tileworks (**www.karensinger.com**) is celebrating its 25th year. "Over the years, we've worked with several clients who exceeded their fundraising goals by millions of dollars, thanks in part to the donor wall they invested in early in the fundraising process. Too often, people think, 'Uh-oh, our campaign is just about done. Now we've got to think about our donor wall.' They are missing such an opportunity."

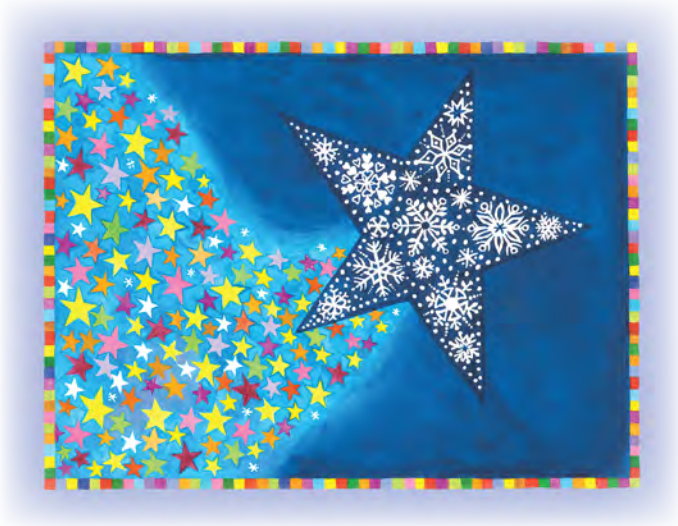
One of Singer's most successful projects involved the new emergency department at Doylestown Hospital in Doylestown, Pa., and a mural that cost $150,000 but helped surpass the fundraising goal by $2.5 million. "No question about it," says Linda Felt, then vice president of development at the hospital. "The mural was so attractive that people pointed to it and said, 'I want one of those plaques. What do I have to do to get one of those?'"

Felt retired in 2014 after 24-plus years on the job, but she still speaks about this project with contagious enthusiasm. "We also sold every room and everything we could name. For those, we created smaller plaques that were tied back to the mural."

Start Before Your First Ask

"Astute development professionals recognize that the true value of donor recognition is not as a 'thank you' after the fact but rather as an incentive to induce generous giving from the very start," explains Eric Ascalon, business development director at Ascalon Studios (**www.ascalonstudios.com**) in West Berlin, N.J.

"Optimally, an organization would approach a professional donor recognition firm during the planning stages of the campaign—before the first donor solicitation is even made," he adds. "As part of the development team, the firm would work with the organization's



development professionals and staff, the designers generating the campaign's printed materials and (in the case of new construction) the facility's architect and interior designers. Based on the preliminary parameters of the campaign, such as financial goals, timeline, number of giving levels, rough estimates of donors per level, etc., and with the physical characteristics of the facility (aesthetics, materials and available space), the designers can create a proposed solution to the organization's donor-recognition needs. This solution would include a dynamic, full-color rendering of the unique project concept, which would be integrated into the campaign's printed materials, on its website, on posters in the lobby and so forth. Potential donors would have before them a tangible representation of how their generosity would be recognized. A well-designed, truly original project concept would whet the appetite of potential donors and help create a buzz in the community. Illustrations could be included that would differentiate recognition at various giving levels, thereby helping to induce donors to become even more generous."

Felt agrees. Before the first major-donor visit, Singer developed an artist rendering of the donor wall so they could show how beautiful and effective it would be. "We took that with us on every visit and every meeting," she recalls. "We had it displayed so people could see our vision. You have to have the design early. Major donors want to have an idea about how they will be recognized."

KATIE S. ATKINSON/ILLUSTRATION SOURCE

This kind of visual representation of the proposed donor recognition also makes it easier to ask for additional gifts, says Richard Nicolson, creative director at Donor Signs.com (**www.donorsigns.com**) in Bloomfield, Mich. "Fundraisers find it not only beneficial to be able to show a prospect something tangible, but they can also use recognition designs as a way to urge donors to get to the next giving level."

Even if you have already started your fundraising efforts, an artistic donor wall can help re-energize a stalled campaign and inspire positive publicity—in newsletters, blog posts or the press—to generate new interest.

What's in a Name?

By Vincent E. Duckworth, B.Sc., CFRE

Historically, the core documents for a successful fundraising program have been a case for support and a fund development plan. Today, those may be a trio if you include the philanthropic naming plan.

Naming spaces and programs to recognize financial and societal contributions is not new. In fact, many of our most important public spaces and institutions have been named to recognize these contributions. What is relatively new, however, is that naming has become mainstream. It is no longer only the purview of a small number of community leaders.

Why do we name museum wings, concert halls, parks—almost anything? There are two answers. The short one is that it represents the ultimate form of enduring recognition and acknowledgement for your most committed donors. The longer answer is that donors are looking for this type of recognition; the members of your governing board (who not only represent your community but who, themselves, are often significant donors to your cause) expect this type of planning; and, finally, you do it because it adds an important professional tool to your fundraising tool kit.

Why do donors care? There are many reasons why donors are interested in philanthropic naming. Three of the most common are

- to be remembered,
- to honor others and
- to be associated with something they care about.

Good questions to ask donors who may be interested in making a naming gift are:

- Is the naming meant to honor them personally?
- Is the naming meant to honor someone else who is important to them?

At the same time, governing boards have increasingly sophisticated expectations around the planning and execution of fundraising activity. In addition to wanting to see a case for support and a campaign plan, boards now expect to see a philanthropic and sponsorship naming plan as an early part of fundraising planning. Board members want to know that their organization's naming opportunities and valuations are

- of sufficient quantity to provide a range of recognition and acknowledgement opportunities for donors;
- of sufficient quantity to provide the fundraising team (and hence, the fundraising program) with enough opportunities to recognize all of the naming gifts that will make up the fundraising goal; and
- of a quality that is in keeping with the organization's mission and vision.

In addition, strong governing boards are engaged in the fundraising activity of the organization. As fundraising volunteers, they want to have an understanding of the naming opportunities and be able to speak to the rationale behind why they were selected and how the valuations were developed.

So, how does naming fit into your solicitation plans? Working with prospective donors who are likely to be interested and capable of making philanthropic naming gifts requires experience and planning. For these prospective donors, philanthropic naming has a significant role in your solicitation plan or, more specifically, the stewardship and recognition plan for your prospective donor. Solicitation plans include, among other things, information on the interests of the prospective donor. They also should include personalized information on the recognition and stewardship aspects associated with the likely gift level.

Beyond the Blueprints

The physical beauty of the donor-recognition wall is impressive, but like all good art, a well-designed donor wall also can engender powerful emotions that lead to increased donor loyalty and community awareness. It creates an atmosphere of caring, says Christina Amri, founder of Amri Studio (**www.amristudio.com**) in Portland, Ore. "The best clients I've had over 30-plus years understand that creating a culture of honoring is more than a pretty wall," she explains. "It's about involving donors early on and really talking and listening to them. It also recognizes the values of the institution,

There are two key questions to answer in your solicitation plan:

1. Are there naming opportunities, at the right gift level, that match up with the interests of the prospective donor?
2. How does the prospective donor want to be formally recognized with the naming?

Being asked to develop a philanthropic naming plan can be a daunting prospect. Where do you start? What resources do you need? Asking the right questions and developing the right answers will turn what appears to be an insurmountable task into an achievable plan.

A philanthropic naming plan comprises, minimally, the following two components.

1. Naming policies. These are the most important components of a philanthropic naming plan. They are the board-approved statements, guidelines and procedures related to naming that protect the rights and reputation of both the organization and the donor. They guide your organization's acceptance and treatment of philanthropic naming gifts and how your organization will work with these donors over the life of their naming gift. Such policies need to contain, at a minimum, the following four elements:

- Statements that indicate the need for current and ongoing alignment between the values of the donor and the values of your organization
- Statements that indicate what spaces, programs or facilities are available to be named and those that are not available to be named
- Statements that indicate how long the philanthropic naming will remain in place
- Statements that indicate the approval processes for various naming levels and categories

2. Naming opportunities (the "inventory"). This is a listing of institutional assets, each with its own gift value, all of which are available to be named for philanthropic gifts.

Finally, be aware of the three myths about philanthropic naming.

Myth No. 1: We can't give our donor a charitable tax receipt if we recognize them with a philanthropic naming.

Unlike sponsorship naming, which is a commercial transaction involving a contractual and mutual exchange of value, philanthropic naming does not involve a mutual exchange of value. Philanthropic naming is a recognition and stewardship activity; it is not a commercial contractual activity. Charitable receipts are regularly given for philanthropic naming gifts.

Myth No. 2: Naming spaces and programs for gifts will erode mission and brand.

When done purposefully and thoughtfully, philanthropic naming can significantly enhance your reputation and your brand—and, hence, your mission. It has done so with many of the world's leading not-for-profits.

Myth No. 3: Philanthropic naming is only useful for new capital projects.

Philanthropic naming plans are often done for existing spaces and programs as well as for new capital projects. Many organizations have large, existing capital facilities and programs, all of which would benefit from a consistent and comprehensive naming valuation.

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the staff and the community at large because everybody made the project possible. Donor recognition is the final, beautiful bow on the package and a statement of inspiration to potential, future donors."

In other words, these walls share the story of the organization, from mission to actions to aspirations. Stories, which captivate far more than facts and figures do, take people out of their critical left brains so that they are no longer on the sidelines watching—or, in this case, looking at—a list of names. They join the storytellers and step into the story. As Singer puts it, these walls allow organizations to share their "hidden history," those traits they want people to better understand. "The mural or donor wall can be a vehicle for telling the parts of your story that you wish people knew more about, in a highly visual format," she says.

Amri also likes to explore with her clients the lifetime value of their donors. She defines that as "a measure of how to sustainably steward the donor during the duration of the relationship." Just as it takes a lot of time, training and money to keep a good employee, the same applies to donors. "A beautiful donor wall can play a big role in

More Donor-Recognition Tips

Are you ready to increase your fundraising goals while you retain—and even gain—donors? Consider these additional tips from the professionals to help you create memorable and meaningful donor recognition.

1. Develop a written donor-recognition policy.

"Without a policy, donors tend to dictate how they want to be recognized, and that can quickly spin out of control. Even the most demanding donor will follow a written, documented policy. Interestingly, even though most donors do want to be recognized, they do not want to appear greedy, and they welcome guidance."

—Richard Nicolson, Donor Signs.com (www.donorsigns.com)

"Be very clear on the levels of giving and the approximate number in each level you want to recognize. Do not make commitments to donors on what their recognition will look like until you have a clear understanding of the recognition program."

—Richard Baum, W & E Baum (www.webaum.com)

2. Create a powerful design.

"Spend the money on a great design. When used for a campaign, this helps open the door to converting campaign donors into major annual support and ultimately, hopefully, a legacy gift."

—Jill M. Burgess, vice president, Presentations Inc. (www.p-egd.com), Hiawatha, Iowa

"Each recognition wall should be unique to the organization with logos, mission statements and graphics incorporated whenever possible. The materials used to fabricate the donor-recognition wall need to work within the aesthetics of the area where the wall will be installed. Individual plaques or other recognition pieces should be made from the same material as the donor wall, clearly tying together the recognition throughout the facility."

—Richard Baum, W & E Baum

3. Use your imagination.

"Since approximately 80 percent of donors use a smartphone, I would like to see digital used for the campaign and then added to the donor-recognition wall. With digital signage software, a nonprofit could produce the digital element at the start of a campaign and send the URL to all potential donors. Because it is viewable on phones and tablets, donors could remotely follow along with the campaign. Progress or live stream video could be posted to engage donors. Add a special link so they could donate throughout the campaign with a touch of a button. Donors no longer have to be local."

—Jill M. Burgess, Presentations Inc.

4. Celebrate!

"When it's time to unveil your donor recognition, throw a party, and invite everyone in your community. Create some drama—cover the wall or art with a curtain, and have your CEO or a VIP drop the curtain. Harness the emotional power of having the donors inscribed on a permanent work of art that makes people stop and ask, 'How can I get on that wall?'"

—Karen Singer, Karen Singer Tileworks (www.karensinger.com)

donor retention, as they see it every time they enter the building. It's more emotional than rational, tapping into their hearts and increasing their loyalty," Amri says. "We support our clients and the institutions that make a difference in the world by helping them express their identity and caring values. We believe every caring act is an 'act of light,' and we work to illuminate these precious acts."

Build Your Brand

When you involve professional artists and designers in your donor-wall project, the results are often too good to limit to one wall. Instead, think of the design as more of a branding system. Use it on naming plaques for rooms, as Felt did at Doylestown Hospital, and other promotional materials such as gifts for donors, letterhead, handouts, brochures, invitations, thank-you notes and annual reports. Put it on your website, especially on the giving page. "Use the design as a wow factor in your campaign," Singer adds. "It's a permanent work of art that captures the spirit of your organization and keeps on giving."

Look Ahead and Make Room for More

Perhaps you want a design that can be updated as your campaign advances. "Many of our interactive walls are installed prior to the campaign," says Richard Baum, president of W & E Baum (**www.webaum.com**) in Freehold, N.J. "The information displayed on the screen is constantly updated as the campaign progresses. Once the campaign is completed, additional permanent features can be incorporated on the wall around the screen."

Felt notes the mural design at Doylestown Hospital, which included stones with donor names on them and eight stones left blank. "At our victory event, or opening night, we sold two of these stones when our president, Richard Rief, remarked that those who hadn't gotten their gift in yet could still be on the mural," she says. "Two people came up that night and pledged the $100,000. Rich and I both felt that donor-recognition mural made all the difference in our fundraising. We created an image people were so attracted to that they had to be a part of it."

Almost all of Amri's pieces are designed to be updated. "Digital donor recognition gives clients literally overnight changes," she says. "We send them a flash drive of their digital list, they update it and send it back and we make their changes. For our permanent panels, we leave room to add names, generally on a schedule to update periodically. We encourage them to make the most of this by holding an event about adding new donor names. And while the panels are out for updating, we create a placeholder sign that says, in effect, 'Guess what? We have more donors coming on board. Call the organization if you want to be a part of this.'"

Remember the 'I' in ROI

When it comes to number crunching and return on investment (ROI), it is all too easy to scale back your donor recognition and think you cannot go big. However, figures show that it can be an investment that pays real dividends. "Good donor recognition does not come cheap," Ascalon admits, "but time and time again, we have seen that when organizations exploit the tools of donor recognition throughout the process, and not just at its conclusion, donor recognition pays for itself many-fold. Potential donors who understand that their names will be part of something special are more apt to participate, and participate enthusiastically and generously."

Amri agrees. In an article she wrote with Penny Cowdon, former vice president at Inova Health ("Donor Recognition: Calculating ROI in Dollars—and Sensibility," **www.amristudio.com/s/ROI-and-Donor-Recognition.pdf**), they explored not only the tangible returns from this investment but also the ways donor recognition can tap into emotions—where people buy in to ideas and causes. They cited Patricia Burns, retired president of the Miller-Dwan Foundation in Duluth, Minn., who succinctly summed up the key reason this style of donor recognition is so effective: "We felt the donor project needed … to make an emotional and spiritual connection. … The engagement of donors in philanthropy is one that comes from the heart, and unfortunately, so many recognition systems come just from the head."

According to Amri and Cowdon, the ROI of a heart-centered donor wall can run as high as 3-to-1 for a five-year-old organization and 6-to-1 for a 20-year-old organization. "If something is luminous and beautiful, your donors will be inspired," Amri says. "If they're inspired on an emotional level, then they *feel* invited and included. They want to be part of that community because they sense you are going to appreciate them. People think, 'Hey, I want to get involved. I'm going to be in an environment of gratitude in this community organization, and I want to be a part of that.' This is the culture of honoring."

Lynda McDaniel is a freelance writer in Sebastopol, Calif. (www.lyndamcdaniel.com).

Making the Most of Your Technology Palette

By Mark Brewer

According to Stacey Segal, a senior director at BrightVine Solutions (**www.brightvinesolutions.com**) in Hopkinton, Mass., "Many leaders are looking at ways to be more cost-effective and more analytical. In order to be the best fundraiser, you need the best technology behind you so that it doesn't take your team five hours to do what could be done in five minutes."

How true. For many fundraisers, however, this is a lot easier said than done.

Do More—Better and Faster

As nonprofits experience the evolution of their donor base from the loyalists of the Greatest Generation to younger donors, a concurrent revolution in technology is shifting perspectives on how fundraisers will reach and retain those younger donors who have higher expectations about how they want to be engaged and cultivated.

KAMALOVA/ILLUSTRATION SOURCE

Emerging technology offers new opportunities for fundraisers to better understand their donors at all levels of the giving spectrum. You are now able to go beyond LYBUNTS (last year but unfortunately not this year) and SYBUNTS (some year but unfortunately not this year) for segmentation to target messaging based on age, interests, acquisition source and other factors. These new tools analyze results much faster so that campaigns can be tweaked on the fly instead of waiting weeks to evaluate effectiveness. Leaders also now have the opportunity to increase efficiency by applying the right tools to the right task and automating repetitive grunt work.

The ability to process and analyze trends using mass quantities of data has already changed the way for-profit marketers reach their prospects and customers and is conditioning your constituents to expect to be courted in a new, more immediate and personal way. The same tools used in the for-profit world are now optimized for fundraising, giving nonprofits the same capabilities and opportunities. The shift leverages a number of emerging technologies that can better utilize the data you already have to better engage your constituents, leading to better relationships, better acquisition and retention and, ultimately, the hope of sustainable funding for your organization's mission.

"The rapidly expanding volume and velocity of new data is creating exciting trend analysis opportunities for the nonprofit community," says Jim Funari, co-founder and CEO of StratusLIVE (**www.stratuslive.com**) in Virginia Beach, Va. "By combining transactional information, such as RFM (recency, frequency, monetary) analysis, with new, deeper insights such as engagement health, constituent lifecycle management, multivariate testing, predictive ROI and motivational interest scoring, fundraisers can now reach entirely new levels of personalization in real time at an individual donor level."

These analytical abilities will become increasingly more useful and perhaps even more necessary as your donor base evolves. Historically, fundraising leaders communicate with donors at the upper end of giving face to face, largely with constituents from the Greatest Generation, says David Munshine, president of The Munshine Group (**www.munshinegroup.com**) in Springfield, N.J. "Now, we see retention rates, alumni giving and other metrics falling off the cliff. A lot of that is because of the loss of the WWII generation. Increasingly, the methods we've used in the past aren't going to work as well in the future."

According to Jay Goulart, a 20-year fundraiser and co-founder and chief data artist at NewSci LLC (**http://newsci.co**) in Tampa, Fla., aging tool sets were designed to store and retrieve information but not to analyze the data for insights. Traditional tools are based on 1950s technology that recognizes only structured data—data that fit into rows and columns. For example, you may have thousands of call reports containing unstructured data that are not searchable for insights with your traditional tools. "The ability for new technology to capture unstructured data and then make sense of it is going to change our world," he says. "This current shift to big data really means that no data is off limits."

Indeed, new technology can capture and analyze a much richer set of data points for any individual you may be researching.

Greater Opportunities

Engagement is becoming a strategic focus for getting to people earlier in the cycle and getting them to know, like and trust your organization. Rich Dietz, director of fundraising strategy at Abila (**www.abila.com**) in Austin, Texas, says that focusing on engagement, which leads to gifts, rather than focusing on gifts only, is critical. "If you do that, you connect with donors in a much more real way, and donors are much more likely to engage back, share or post on Facebook, reply to emails and eventually actually donate," he says.

Emerging technologies provide the ability to cast a wider net to not only reach more people but also give people the opportunity to self-identify as being open to cultivation. As a prospect demonstrates greater levels of interest, fundraisers can then reach out in a more personal, high-touch way. Munshine recalls a recent Giving Tuesday campaign that yielded 15 percent first-time donors, most of whom were not in the client's database. "That was a way we were able to use technology for donor acquisition," he says, "and have a direct response that can fuel additional interaction."

Goulart explains that new technology can help segment donors based on how they see the world and how they see themselves in the world. These insights are drawn from huge amounts of data published by individuals every day. "If you have six categories of types of people and you can write to these six types, you're upping your probability of success when you're able to marry language with how people's brains are wired," he explains. "You can do that today for an individual, but with the ability to do that with 200,000 people, you may find that you have patterns of types of people. Then, you can craft stewardship, solicitations and other communication based on a deeper level of understanding of the people you are trying to connect with."

New technology also can automate basic business processes. Funari explains that tools can be strung together to create automated workflows. In researching a prospect, for example, software can make the call to the wealth-screening service and bring the information back into the database, then automatically search the database to see if there is an influencer in your network who knows the prospect.

Furthermore, it is critical to adopt new technology that eliminates as many disconnected systems as possible. "This allows for a much clearer view of donors and contributes to greater speed and automation," Funari says. "A campaign response can instantly trigger highly granular marketing appeals, treatments and tactics in real time."

Incremental Implementation

While some nonprofits are opting for complete platform migrations from old to new, it is also possible to implement new technology incrementally. "I've found that if I can get clients to do one or two new things based on the data or technology, then they get excited, and we can go further down the technology road," Dietz says. "If you're using one data point now, such as gift size, to segment audiences, add in one more point, such as interest. So, if someone has given to your women's program, why not start sending them targeted content about women's issues?"

With even one extra data point, you get another step closer to giving your donors what they want, when they want it and how they want it.

Munshine suggests finding a few things per year and making small changes. "Make sure you're never standing still," he advises. "Test an appeal, test a strategy, test a new segment. Measure it, and if you like the results, then do more of that activity."

Sitting on the sidelines, waiting for technologies to mature, may not be the best strategy. "There's a fine line between being an early adopter and being so late to the dance that you miss out," Munshine says. "The sands are shifting so quickly that you want to try something new every year or every six months because the rate of change is so rapid. So, today's new method, if you wait for it to be perfect, may be obsolete by the time you get to try it."

So what should leaders do to ensure that they have the right technology at the right time to get the job done right?

Advice for Leaders

Embrace change. "Today's successful organizations are the ones that are willing to plan and prepare for the future," Funari says. "You have to find ways to celebrate and preserve what is working while charting a new course for tomorrow."

Be aware of the choices and possibilities. The technology options and the depth of choices can be overwhelming. In fact, most people are simply not aware of the tools available and how they can make work easier and help attract new donors. "I encourage leaders to explore what's out there and not to accept the first solution presented to them," Segal says. "Look at three or four options to find the solution that will work for your organization. Make the time to find the right solution because you'll get that time back tenfold."

Budget for innovation. "The requirement of senior fundraising leadership is making sure there are resources available for innovation," Munshine says. At the board level, make sure that budgets go beyond repeating everything that's worked in the past. "If all you do is repeat what worked last year, eventually it won't work as well," he adds.

Work within your budget. Look for technology partners who can work within your budget to find the best solutions for your unique situation and donor base. "A lot of leaders are only aware of the big players, but they don't know about other solutions or organizations that can help them find the right tools and implement software at a reasonable cost," Segal explains. "They assume they're stuck with what they have. They also assume it will cost a fortune to have someone help them get up to speed, when in reality, there are a lot of consultants who can do things for a fraction of the price they might be expecting to pay. They can help nonprofits maximize the use of the technology they currently have."

Be creative in augmenting skill sets. Skill sets are always increasing. Many people are becoming highly specialized, making ongoing training more important than ever before. Munshine recommends training development generalists to become more specialized and also seeking outside support to help do an assessment or to develop a program and train staff to run it. "This allows you to increase specialization without hiring new staff," he says.

What Are Big Data, and Where Do They Come From?

Big data generally come from three sources:

- **Transactional data,** including data from invoices, payments and delivery records;
- **Machine data,** including data gathered from industrial equipment and sensors, including sensors embedded in your smartphone, or a heart-rate monitor and cameras; and
- **Social data,** which come from Facebook, Twitter, YouTube and all of the other social media services. On their own, these data are meaningless, but when they are combined with traditional data, such as call reports and constituent records, fundraisers can build a more accurate picture of an individual or analyze trends among larger groups.

Use technology appropriately. In some cases, budget constraints push leaders into using technology for uses that it was not designed for. "They take a piece of software they already own or the cheapest thing available and try to turn it into something it's not," Segal says.

Be open to small failures on your road to success. In this shift to a new era of technology, it will be important to keep an open mind, try new ideas and expect to grind some gears in the process. Realize that not everything will work.

Be optimistic. This shift offers a future of new possibilities that are yet to be fully explored. As Goulart says, "Given your ability to reimagine your work and to partner with new technologies and new abilities, I think it's an incredibly exciting time for nonprofits and people who want to make the world better."

Mark Brewer is a freelance writer in Elizabeth, Ill. (http://markbrewerwriter.com).

The Secret to Great Nonprofit Advertising

By Susan Alexander

*Several years ago, a brilliant copywriter named Jono Polansky (**www.onbeyond.com**) wrote an email that perfectly outlines the do's and don'ts of public interest advertising. With his permission, we're sharing it for the first time here.*

Design per se can make or break an ad, but even if you avoid making your ad unreadable or unattractive, you still need to work from a clear strategy, tacitly expressed in copy and design.

Effective print ad strategies:

1. Ask a question. Frequently, framing the headline as a question is a good way to engage the reader and put him or her in charge. Remember, effective ads are not about the sponsor; they're about the reader. Good public interest ads erase the line between the personal and the political. Asking a question shows that you care enough about what people think and feel, not to lecture them or force them to buy into a conclusion before the conversation even begins.

2. Think telephone, not megaphone. Questions also quickly establish the "voice" of the ad, which is all you've got to simulate a conversation between one person—the advertiser—talking with another person—the reader. The late Arthur Godfrey was one of the first broadcasters to realize he wasn't addressing a theater full of people. He was talking personably to one person sitting by the radio, in the privacy of his or her own imagination. This was a revolutionary insight 70 years ago, yet it's often ignored by public interest advertisers who act like they're holding a megaphone instead of a telephone. Yes, you're often trying to build social movements (or the feeling of one). But every community is made up of individuals. Good ads welcome individuals into a community of action, one by one. FDR's fireside chats worked on this principle, which is all about trust and intimacy and, finally, affinity. Community organizers know this stuff upside down and backwards. So should communicators working on other scales.

If framing the headline as a question introduces too much doubt or the subject is inappropriate for a relatedness approach (e.g., using or implying the word "you" in the headline), then present a headline that claims as much moral territory as possible. Many good ads redefine an issue in fresh terms to overcome fatigue and alienation. Instead of competing, reacting or defending, they often announce a new category. The ad itself should be thought of as an event—naming names, being timely, acting like "news."

3. "Joe Camel meets the Marlboro Man." See the ad on page xx, which ran in film industry trade journals. One in a series (**www.smokefreemovies.ucsf.edu**) designed to end the long collaboration between Hollywood and Big

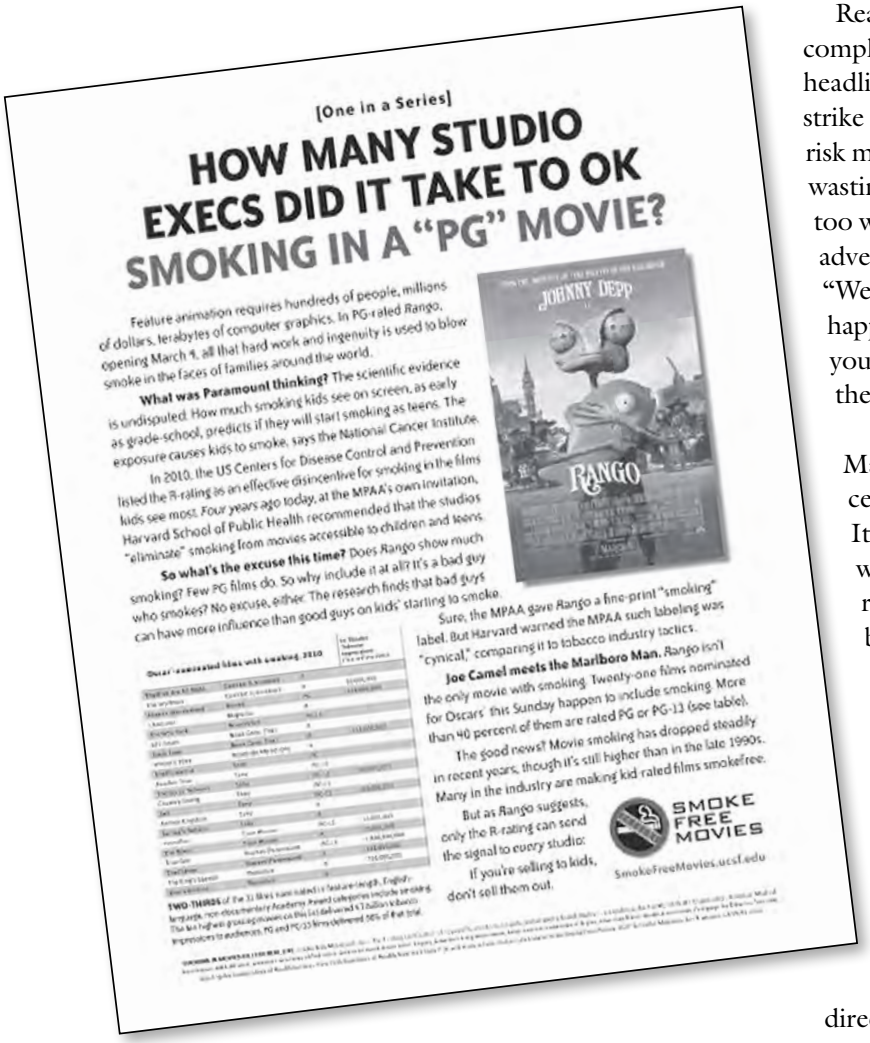
IVARY/GETTY IMAGES

Readers don't passively observe your thought; they actively construct their own as they go.

Good ads abet and reward this activity.

Tobacco, the ads investigate, report and hold people and companies accountable. Leading up to this ad, public health experts confronted Paramount to learn why this kiddie-rated film (*Rango*, 2011) had been tagged for smoking—then ran the ad in the trade press 10 days before the film actually opened. Message: No "suit" is safe. Decision makers will be held publicly accountable.

4. How to hold on to your reader. Beyond making sure you have a good, true story to tell, be aware of how readers decide to stick or go. Give the reader multiple entry points into the ad (skyhead at the top of the page, main headline, picture caption, signature tag, lead, pull-quotes, to name a few such portals), and clearly map the route between them. Three or four landmarks not only give you several nuanced chances to interest a reader but they also encourage the reader to scan the whole page while deciding to stay or leave (having invested some time, they're more likely to spend more). At their best, these elements act like a simple connect-the-dots drawing. A bit of unresolved tension between the main headline and primary visual also invites the reader to fill in the blank and be rewarded for it.



[One in a Series]

HOW MANY STUDIO EXECS DID IT TAKE TO OK SMOKING IN A "PG" MOVIE?

Feature animation requires hundreds of people, millions of dollars, terabytes of computer graphics. In PG-rated *Rango*, opening March 4, all that hard work and ingenuity is used to blow smoke in the faces of families around the world.

What was Paramount thinking? The scientific evidence is undisputed: How much smoking kids see on screen, as early as grade-school, predicts if they will start smoking as teens. The exposure causes kids to smoke, says the National Cancer Institute.

In 2010, the US Centers for Disease Control and Prevention listed the R-rating as an effective disincentive for smoking in the films kids see most. Four years ago today, at the MPAA's own invitation, Harvard School of Public Health recommended that the studios "eliminate" smoking from movies accessible to children and teens.

So what's the excuse this time? Does *Rango* show much smoking? Few PG films do. So why include it at all? It's a bad guy who smokes? No excuse, either. The research finds that bad guys can have more influence than good guys on kids' starting to smoke.

Sure, the MPAA gave *Rango* a fine-print "smoking" label. But Harvard warned the MPAA such labeling was "cynical," comparing it to tobacco industry tactics.

Joe Camel meets the Marlboro Man. *Rango* isn't the only movie with smoking. Twenty-one films nominated for Oscars this Sunday happen to include smoking. More than 40 percent of them are rated PG or PG-13 (see table).

The good news? Movie smoking has dropped steadily in recent years, though it's still higher than in the late 1990s. Many in the industry are making kid-rated films smokefree.

But as *Rango* suggests, only the R-rating can send the signal to every studio: If you're selling to kids, don't sell them out.

SMOKE FREE MOVIES

SmokeFreeMovies.ucsf.edu

Readers will bounce off ads that are too literal or complete: "Got it. I'm gone." Incomprehensible headlines or mysterious visuals, on the other hand, strike readers as more trouble than they're worth—and risk making them feel dumb: "What's the payoff? You're wasting my time!" The balance between leaving an ad too wide open and shutting it up too tight is what good advertising is all about, millisecond by millisecond: "Well, that was interesting for me. I wonder what happens next … " Readers don't passively observe your thought; they actively construct their own as they go. Good ads abet and reward this activity.

Always, always, give the reader something to do. Make the action direct, simple and satisfying. Action cements the connection between reader and issue. It is also, on its face, empowering. Exciting emotion without providing an outlet is a tease, leaving the reader more frustrated, cynical or alienated than before.

In TV advertising and branding, writing often seems to take a backseat to the visual. But in print, the writing in the headline and the body is obviously crucial. All readers are volunteers. They'll take any excuse to disengage and turn the page. A lot of public interest advertising mistakenly adopts a mass marketer's model—big image, clever headline, two lines of copy: "Look, Ma, I'm in advertising!" Instead, examine the implied dialogue with the reader in effective direct mail and in long-copy ads from the 1920s to

1960s and in unhip but results-oriented, direct-response ads today. Looking for commitment? Invite the readers to spend some time making your issue their issue. That's the beginning of an authentic, long-term relationship. (Incidentally, those last three sentences are an example of how implied dialogue works in copy.)

5. Who is the real audience, and what do they need to hear? The key question in any ad strategy is, "Whom do I need to talk with around here?" Public interest advertising is directed at the public or a subset drawn to the newspaper or magazine you're running in, but its ultimate audience may be a mere fistful of cold-blooded policymakers. They'll read the ad—not to be convinced on its merits—but to judge if an issue has attracted enough money and expert advice to become a political factor. Has redefining an issue broadened its appeal? Does the message give an issue's champions new and more powerful language? Does it alter, or threaten to alter, the political calculus? Many good public interest ads are designed to reach very different readers, the amateur citizen and the professional politician, simultaneously. (Your credibility with the latter depends on showing you know how to move the former.) On issues that have ground to a standstill, it saves time to enlist professionals who, oddly enough, think about traction constantly and have gotten people out of ditches before. Revving up the motor, without a good plan, will just deepen the rut. Advertising isn't rocket science, but you do need to know how to shift gears. And when.

6. Design matters. Using one ad to reach such distinct audiences demands resourcefulness. The ad-maker must be acutely aware of every factor, from the day of the week the ad will run to the typography, which is the music of the song a good ad sings. An ad's page placement and timing are as important as its message, voice and composition. Bottom line? If you don't have much, use everything you've got consciously, purposively, strategically. Dolly Parton said it best: "Find out who you are … and do it on purpose." Research can help you find out where your readers start from, so you can accompany them on their journey of discovery from Point A to Point B, six inches away but much closer to you.

Because of the extra (and unjustifiable) cost, full-bleeds and color are out of reach for most public interest advertisers. If you think you need full color to compete with commercial ads, your readers may well view you as just another consumer item. The point is, you're not. Black-and-white has an aura of documentation, which is why it's good practice not to manipulate photos; doing so suggests the truth is insufficient. The key to good acting is to look like you're not acting. If you're limited to black-and-white, then be true to its nature, and make the most of it. Some concepts simply won't fly in monochrome, but the right print concept doesn't need color.

Use print to do what print does best: explain and empower. It's a thoughtful medium, in which the emotion derives from quiet outrage, satisfaction in seeing wrong undone, feeling more competent and effective. Every medium has its particular exigencies. TV spots don't work like PowerPoint presentations. Brochures don't work like radio spots. Be aware of what each medium does well. The simpler the ad, the more precise the strategy must be. The more precise the strategy, the simpler the ad can be. A picture may be worth a thousand words, true, but the right word might be worth even more, because it can determine what the reader sees in any picture.

7. Make it personal. Show the reader respect. Treat each one as an intelligent person. Talk with him or her (*not* "to them") as if he or she shares your basic values. Give each a chance to act on deeply held instincts about what is fair, just, right. All communication is a transaction of time. Want a reader to think or act? Then offer a fair trade—by showing honest respect, delivering pertinent information and making every word and image count. Respect is the rarest commodity in advertising driven by marketing interests that exploit our primitive anxieties. Authentic advertising in the public interest never treats the reader as a target to be manipulated or as a child to be distracted but as an aware and critical equal constantly making perfectly understandable choices about where to spend his or her time.

The best advertising is to do what you do, out loud, vividly, concretely, in the manner befitting the medium available to you. Action is all. Advertising is simply a way to involve more people in the action than you have the time or opportunity to reach face-to-face. Good advertising on any subject, in any medium, is a skillful scaling up of that one-on-one conversation and shared experience you and your reader both want so much.

Note: This article first appeared in a blog for San Francisco-based branding firm Mission-Minded (**http://mission-minded.com**). Reprinted with permission.

Susan Alexander lives in San Francisco and is a communications consultant for nonprofit organizations.

Association of Fundraising Professionals

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The Last Word

Nowhere else will you learn the fascinating findings from *Undercooked: Half-Baked Observations of Burning Issues in the Nonprofit Sector* in "Games Fundraisers Play" by Larry Hostetler that appear in "The Last Word." This unique article is an addition to *Advancing Philanthropy* and is available only in the digital magazine. To access the digital *Advancing Philanthropy*, visit **www.afpnet.org** and select "Publications."

Calling All Artists, Poets and Photographers!

We invite AFP members everywhere to submit their art and poetry to exhibit at the Diversity Art Showcase at the 53rd International Fundraising Conference, March 20–22, 2016, in Boston. The Diversity and Inclusion Committee again will be sponsoring an art showcase (located in the conference Marketplace) that spotlights youth art, a local professional artist and the artwork of AFP members. The showcase strives to portray the uniqueness, value and diversity of people through art, photos and poetry.

Fundraisers are a diverse group. Their diversity unites them and thus makes the art showcase even more beautiful and meaningful! So, whether you are a beginner or a seasoned artist or poet, you are warmly invited to participate.

Submissions of all types of art are encouraged, including painting, photography, drawing, sketches, collage, quilting, computer art, mixed media and sculpture. Also, poetry submissions can include rhymed poetry, free verse, experimental and Haiku.

Take the challenge—be creative, and display your art in Boston! Use your artistic talents to show that philanthropy is truly the "love of humanity."

AFP's got talent, so please let us know if you want to display your artwork! Email Tori Burns, CFRE, at **tburns4@ccbcmd.edu** or call 443-840-3617. She will be happy to provide you with additional information and answer any questions you have.

Also, our sincerest thanks to The Alford Group (**http://alford.com**) for sponsoring the AFP Diversity Art Showcase.

Wilson C. "Bill" Levis Receives Barbara Marion Award

AFP has bestowed the Barbara Marion Award for Outstanding Leadership to AFP, the association's highest volunteer and leadership recognition, to Wilson C. "Bill" Levis of Germantown, Md.

When you ask Wilson "Bill" Levis about anything related to AFP or fundraising effectiveness, you can feel, see and hear his passion! At only 84 years young, his energy and enthusiasm for helping others raise more money for their missions tirelessly drive the profession to new heights. Levis is currently volunteer project manager of the Fundraising Effectiveness Project (FEP), which is co-sponsored by the Center for Nonprofits and Philanthropy at the Urban Institute and AFP. The FEP project purpose is to find ways to increase philanthropy's share of the gross domestic product from the 2 percent average for the last 40 years to 3 percent or higher. FEP is currently focused on measuring the rate of growth in giving based on the concept that growth consists of the net of gains in giving less losses. Bill has been a pioneer in this work, utilizing and partnering with AFP since his membership began in 1973.

His ideas helped create the "Planning to Keep Your Donors Workshop" that is now offered at AFP chapters. Levis also has spoken to countless members, chapters and chapter leaders about fundraising effectiveness, donor retention, donor acquisition, gift renewals, gift retention and more. He has mentored chapter leaders, members and AFP guests for decades through his passionate and engaging leadership on various issues related to AFP. He has served in roles in leadership (boards, committees, task forces, initiatives, etc.), and his work has contributed to membership development, certification processes, ethics (especially as it relates to the ACFRE process), government relations (through his work with the FEP, AFP and the Urban Institute) and public relations, as he has worked tirelessly to promote and educate the public about the importance of fundraising metrics.

Levis also has been tireless in his mentoring, teaching and working with others in the field of philanthropy, whether talking with an organizational leader at the Indiana University Lilly Family School of Philanthropy, an ACFRE candidate, an AFP board or committee chair, multiple AFP committee members, donor software company leaders, academic students of philanthropy or AFP members with questions related to leadership or research.

Levis truly has the ability to engage and involve others in AFP through the donation of their time and resources. He believes in and carries out the mission of AFP through his work, his demeanor and his leadership—and has been doing so for decades. Whatever may be wrong with the world of philanthropy or the world around us, Levis sees AFP as a lever and facilitator for positive change, and he leads and works accordingly.

Levis has dedicated his life to improving the effectiveness of the nonprofit sector, and his commitment to AFP has been steadfast, giving thousands of dollars in support of AFP as a dues-paying member—even though he has never actually been a fundraiser! In 2014, he gave a generous gift that led to the setting up of the **http://afpfep.org** website, which is a part of the AFP website, and he has made countless other contributions to AFP over the years as well.

Benjamin Mohler Earns ACFRE

AFP has awarded its highest professional certification, the Advanced Certified Fundraising Executive (ACFRE), to Benjamin Mohler of Richmond, Ky.

Mohler is the assistant vice president for major and planned gifts at Eastern Kentucky University. Previously, he served in key development roles at the University of North Carolina at Charlotte, Cedarville University in Ohio and the University of Texas at Austin and was named to the *Charlotte Business Journal*'s "Forty Under 40" in 2013. Mohler holds a bachelor's degree in communications from Cedarville University and a master's in philanthropy and development from Saint Mary's University of Minnesota.

Available only to senior-level fundraisers who have worked in the profession for at least 10 years, the ACFRE is a distinguished achievement earned by only 108 professionals since the program's inception in 1992.

The ACFRE program is the most rigorous certification process available to professional fundraisers. The process includes a comprehensive application, detailing achievements in practice, education, publishing, teaching and service to the profession; a written examination that measures a candidate's knowledge of fundraising as well as the philosophical, ethical and social aspects of philanthropy; a portfolio representing the candidate's body of professional work; and an oral peer review, in which the candidate must articulate a mastery of advanced-level knowledge in fundraising management, leadership and ethics.

The AFP ACFRE Certification Board, chaired by Alice L. Ferris, ACFRE, MBA, CFRE, oversees the ACFRE candidate review process. For more information about the ACFRE, visit **www.afpnet.org** and select "Professional Development."

The 2015 National Philanthropy Day Honors

The recipients of the 2015 National Philanthropy Day Honors included a powerhouse philanthropic couple from Virginia Beach, Va., a world-famous beverage corporation headquartered in Atlanta and a youth group from Pratt, Kan.

AFP's second annual National Philanthropy Day Honors event was held on Nov. 12, 2015, at the 92nd Street Y in New York. The National Philanthropy Day Honors recognizes individuals and organizations for their tireless work and dedication to philanthropy that has significantly improved the quality of life for people in their communities and around the world. The honorees were the following:

- Outstanding Philanthropist: Joan and Macon Brock, Virginia Beach, Va.
- Outstanding Volunteer Fundraiser: Peter Ferranttelli, San Diego, Calif.
- Outstanding Corporation: The Coca-Cola Company, Atlanta, Ga.
- Outstanding Foundation: The Edyth Bush Charitable Foundation, Winter Park, Fla.
- Bob Carter Companies Outstanding Youth in Philanthropy, Individual: Kinsey Morrison, Louisville, Ky.
- Bob Carter Companies Outstanding Youth in Philanthropy, Group: Youth Making a Difference, Pratt, Kan.

National Philanthropy Day is the day set aside to recognize the impact that philanthropy—and those

involved in the philanthropic process—have made to the world. President Ronald Reagan signed a proclamation creating the day in 1986, and the Canadian government made National Philanthropy Day a permanent day of recognition in 2012.

For more information about National Philanthropy Day, visit **www.npdlove.com**.

Keep Your Organization Fit!

If you have not looked into the Fundraising Effectiveness Project (FEP) yet, now is the time. Not only is donor retention becoming more critical for charities, but the FEP also has an improved website and new resources, including the Fundraising Fitness Test, to help measure your development program's effectiveness.

Thanks to a grant from Indianapolis-based Bloomerang (**https://bloomerang.co**) and support from other partner organizations, the new FEP website (**http://afpfep.org**) has all of the FEP research reports from 2008 available for download, as well as measurement tools from the Growth in Giving Initiative (GiGi).

The goal of the FEP and the emerging GiGi is to help grow philanthropy's share of the gross domestic product. FEP and GiGi pursue this goal by providing nonprofits with tools for tracking and evaluating their annual growth in giving. FEP conducts an annual survey, provides useful growth in giving performance measurement tools and publishes gain/loss statistics in a yearly report through a partnership among AFP, the Urban Institute and participating donor software firms.

In collaboration with Philanthropic Services for Institutions/Adventists (**www.philanthropicservice.com**), the FEP has developed a downloadable, Excel-based GiGi Fundraising Fitness Test that allows nonprofits to measure and evaluate their fundraising programs against a set of more than 100 performance indicators by five donor-giving levels. The fundraising performance reports are generated by inserting gift transaction data into the Fundraising Fitness Test Excel template. The performance reports can be generated for each year as far back as the gift transactions' history goes.

Performance indicators include donor retention rates (new donor retention, repeat donor retention and overall donor retention); donor gains, losses and net; dollar gains, losses and net; growth in giving ($); growth in number of donors; and donor attrition. Gift range categories are $5,000 and up; $1,000 to $4,999; $250 to $999; $100 to $249; and less than $100.

The core Growth-in-Giving (GiG) report provides a concise yet informative picture of fundraising gains and losses—growth in giving and attrition—in a simple, reader-friendly format that executive staff and board members can understand. The GiG reports are generated by inserting gift transaction data into the downloadable, Excel-based GiG report template.

The GiG report template automatically produces the core GiG report, the centerpiece of the FEP gain/loss reporting package, along with six other GiG reports that are also useful. The GiG reports are cross-referenced to figures and tables in a helpful article ("A Better Measure of Success") on the website.

Templates and instructions for all of these reports, as well as FEP studies and articles, can be found on the FEP website, **http://afpfep.org**.

Index of Advertisers

Cathy Cessna, ACFRE

When did you join AFP? I was a member of NSFE for years and received my CFRE in 2003. My first AFP board position was on the marketing committee for the AFP Greater Philadelphia Chapter (AFP-GPC).

How did you get involved in the nonprofit sector and fundraising? I have been volunteering since early childhood at church and was a missionary in Honduras and Guatemala in college. I began raising funds in high school as the senior class president and negotiated a deal with McDonald's for our class to sell $1 coupons, splitting the proceeds with the company. My committee raised $6,000 (more than $25,000 in today's dollars) so quickly that the McDonald's manager had to end the program! Later, as a stay-at-home mom, I served on three nonprofit boards and worked almost 80 hours per week as a volunteer. I decided to change my career. I became certified at AFP-GPC's Villanova certification program, obtained my master's in public administration and then applied for my first job at my children's school as assistant director of development.

What do you consider the greatest challenge in your work? Data entry. Loathe it!!

If money were no object, what resources would make your job easier and more effective? LexisNexis® for prospect research! I can only dream of what it would be like to have access to highly sophisticated research tools!

Why did you feel it was important to earn the ACFRE credential? The ACFRE process was surprisingly easy. I write for a living, and each piece of documentation required asked me to express my opinion on a subject matter that was relevant to my career. Like most people, I love to share my opinions! It took four months from start to finish, with the exception of the time it took for the exam to be graded.

I want to be the best at everything I do and set an example for my children and grandchildren. My son lost his brother during his junior year of college. Instead of taking time off, he graduated on time and earned a double degree, saying, "One is for me; the other is for Andrew, who will never have the chance." Max's comment inspired me to get my ACFRE. I needed to create something positive from grief and loss. Now, I am looking for that next goal to achieve.

Lifetime Highlights:

- Assisted Living Conversion Program (ALCP), $1,021,450 award, Department of Housing and Urban Development, June 2004
- Green Retrofit Program, $1,814,558 award, federal government, January 2009
- HUD SUPERNOFA—HUD 202 Grant, $5,679,700 award, Department of Housing and Urban Development, September 2010
- National MetLife Award for Excellence in Affordable Housing, $50,000, June 2011
- Philadelphia Academy of Natural Science, Shell Show 1st Place, October 2014. Won first prize in the double, contemporary Sailor's Valentine artistic division for "Women of the Odyssey" and second place for the single, contemporary valentine, "Sailfish."

What do you think are the greatest misconceptions—still!—about fundraising? Many individuals outside of the profession believe that fundraising is not a specific skill or science and that anyone can be an excellent fundraiser. Educating the public and changing their perception about our profession is one of the best services we can do for ourselves and for other AFP members.

What is the best career advice you ever received? "Never retire." I never plan to!

If you could do anything differently with regard to your work so far, what would it be? Have an assistant to do data entry!

What is your motto? "No means how."

What do you hope to do that you haven't done yet? Hold my first grandchild.

How would you describe your perfect day? Snorkeling in Roatán, Honduras, with my family.

Cathy Cessna, ACFRE, is director of business, program and fund development at Ingleside Homes Inc. (www.inglesidehomes.org) in Wilmington, Del.

Games Fundraisers Play

By Larry Hostetler

With the publication by the Hostetler Institute of Almostno Research (HIAR—not to be confused with HAIR, of which its founder has less and less) of its recent study, *Undercooked: Half-Baked Observations of Burning Issues in the Nonprofit Sector,* various media have reported an imperceptible groundswell of interest. HIAR's executive summary of the research study shares that fundraisers prefer one of three types of games.

Musical chairs (or dominos). Observable more often in smaller communities for the most part, but played everywhere, this game involves fundraisers' "hearing the music" and switching chairs with great frequency. While the timing seems to have slowed during the recent recession, its pace is picking up with economic recovery, and in some areas, it is more rapid than at any time in the last 10 years.

One fundraiser hears the music and switches chairs/jobs, resulting in another fundraiser's taking that fundraiser's place and so on. Some consider this a "domino" effect, with vacancy at one organization resulting in a vacancy at another and another and … you get the idea. The game is disrupted, and sometimes ends, when an organization hires someone from outside the profession (say, a former hedge fund manager—see the king of the hill game below), at which point the music stops. For a while at least.

The game begins anew when someone decides to retire, leave the profession or move out of the area or an organization expands its fundraising staff. The last organization with an empty chair loses, having to figure out whom to invite to join the game—often someone without experience but increasingly someone with a relevant degree.

Organizations can keep their fundraisers from taking part in one of these games by providing an atmosphere conducive to success and appreciating/supporting fundraising efforts. When the environment becomes too stressful and lonely for fundraisers, they look for a king of the hill game to join.

"Tag! Your salary's frozen."

King of the hill. The game begins when a vacancy at the top of the "hill" occurs, often through retirement of the king. When I was a child and we played this game, there would sometimes be hoyden hegemony, at which point the game would be called queen of the hill. This game in the fundraising profession is gradually becoming queen of the hill, as the profession becomes more populated by women than by men. (As much as 80 percent of fundraisers, according to HIAR, are female.) The glass ceiling is becoming a glass more than half full, if you will forgive the mixed metaphor.

This game is played when a vacancy at the top of the "hill" occurs, and fundraisers compete to replace the "king." While the competition is fierce, it is also mostly friendly and seldom results in physical injury to the participants.

The biggest issue with this game is the lack of understanding of the profession and what makes for a successful fundraiser, as demonstrated by the frequency with which top positions are filled by nonfundraisers. (See the hedge fund manager comment above.)

The study cited an instance of a king being crowned from the search committee (gasp!) of the board. Some of the contestants for the crown contacted HIAR's founder and related their concern, at which point the

founder related research suggesting that the position may become available again in a short time as the new king realizes how much difference there is between ruling and serving as a court adviser. Within a year of the coronation, an abdication indeed took place, beginning the game anew.

One of the ways organizations can keep their fundraisers from playing this game is by either providing opportunities for advancement or developing a vision whereby the organization begins a healthy crack the whip game internally (see below). And by knowing what is needed in ruling royalty.

Crack the whip. This game requires the development of a length of participants who join together to form a chain. As the central person begins to run and turn, others must follow. Systems must support the chain down the line until, at the end of the chain, there is someone running as fast as he or she can to keep up, often becoming airborne by the centrifugal force of the systemic momentum, desperately struggling to hang on to the chain. The game ends when someone in the chain loses contact—with others in the chain usually, but sometimes with reality—and the chain falls apart. While some find this to be great fun and a source of great amusement, the individual who breaks the chain is the loser and often must go to the end of the chain and begin to work his or her way back to the center.

The most distressing aspect of this game is the number of organizations that choose to not even play, assuming that only one component (the development director) is all that is needed. Board members' involvement? Not their role. Executive leadership? Too busy already. Database management? Too expensive. Research? What's that, and why is it needed? More staff? Raise more money first.

Some organizations that choose not to play this game decide instead to play a game called "kick the can," which involves delay and denial. However, that game is not explained in the study.

Unfortunately, this research is highly suspect, and the very existence of HIAR has been called into doubt. The founder has been asked to turn over all emails related to his tenure in leadership, which he has said he has done. Investigators are asking for his hard drive as well.

Needless to say, any resemblance to actual, reputable and respected research is all in the spirit of fun.

Larry Hostetler is the AFP chapter services director for the Western United States and has never been a hedge fund manager.

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