



GROWING PHILANTHROPY WORLDWIDE

Big Picture Focus Guided by Sustainability Assessments

*The Association for Animal Welfare Advancement
National Council on Pet Population*

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Matthew J. Beem, PhD, CFRE
President and CEO

HARTSOOK

Signs of a Sustainable Organization

- Excellent leadership
- Quality programs
- Fulfilled staff
- Community awareness
- Adaptable culture
- Vibrant fundraising
- Engaged board
- Loyal donors

HARTSOOK



Challenges

- Excellent leadership
- Quality programs
- Fulfilled staff
- Community awareness
- Adaptable culture
- Vibrant fundraising
- Engaged board
- Loyal donors

HARTSOOK



Fundraising Challenges

- Events ROI
- Grant funding
- Corporate support
- Lack of awareness
- Board involvement
- Understanding of mission
- No time
- No money
- Other _____

Create A Culture of Philanthropy, An Attitude of Abundance

Pessimism produces energy wasted in excuses for low contributions.

Optimism breeds creative thinking, new solutions to challenges, and goals that succeed.

Establish a Common Foundation

Know Your Organization

1. What is your organization's mission?
2. Who benefits from the work of our organization?
3. What makes us different from other organizations?
4. What do people say about our work?
5. How would you document the need for our work?
6. Rational for what we do
7. How old are we?
8. What are our main accomplishments of the last several years?

Importance of “Leadership for Success”

Excellent Leadership

- Inspires
- Plans
- Elevates

Engaged Board

- Commits
- Connects
- Leads

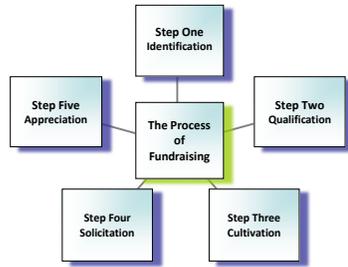
Build Board Leadership

Guide board members to:

- Talk with associates and friends
- Have lunch or coffee
- Share stories
- Share positive experiences
- Connect people with similar interests
- Listen
- Influence people
- Make someone’s day/life better

Understand the status of your current funding model

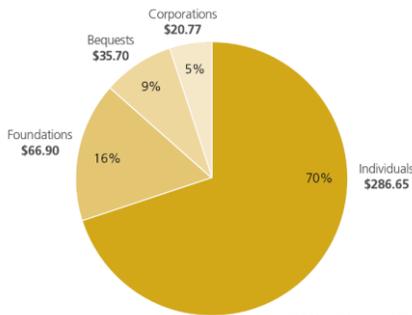
Five Steps of Successful Fundraising



A development program MUST have tools and strategies to address these five steps in the fundraising process. Whether asking for a \$1,000 or \$1 million gift, these steps are always the same. It is the strategies inside each step that may be unique to each organization.

2017 contributions: \$410.02 billion by source

(In billions of dollars – all figures are rounded)



Courtesy: Giving USA 2017 Annual Report

Donor Identification

- Who are your prospects?
- Where is the money?

Individuals	Corporations	Foundations
Previous Donors	Previous donors	Previous donors
Volunteers	Board and trustee affiliated	Board and trustee affiliated foundations
Trustees (current and former)	Vendors	Foundations giving to similar organizations
Parents and other relatives		Local foundations
Friends and friends of friends		Regional and national foundations with matching giving interests

Relationship Fundraising*

From a donor's perspective, this approach addresses how the organization:

- Finds you
- Gets to know you
- Keeps in touch with you
- Tries to ensure that you get what you want from it in every aspect of its dealings with you
- Checks that you are getting what it promised you
- Seeks your advise and input
- Shows it values you

**based on research from first Hartsook Chair Adrian Sargeant, PhD*

Why Do People Make Charitable Gifts?

- They are asked
- Spiritual need or love of humankind
- Personal gratitude
- Perpetuation of ideals, values and goals
- Pride in personal achievement
- Ways of giving are explained
- To assure goal(s) are met
- Prior relationship with organization

Why donors stop giving

- No longer able to afford support
- No memory of ever supporting
- Still supporting by other means
- Feeling that other causes are more deserving
- No longer needs my support
- Relocated
- Not reminded to give again
- Did not inform how my money was used
- Communications were inappropriate
- Asked for inappropriate amount

How to Improve Strategic Results

Develop a Plan

- Strategic Plan
- Case for Support
- Solicitation Strategies
- Communication Strategies
- Goals and Evaluation
- Stewardship and Appreciation
- Budget and Timeline

Strategic Plan

Developing a Strategic Plan for your nonprofit will cost you time and money. But *not* developing a strategic plan for your nonprofit will cost you even more time and money.

Strategic Plan

Ask yourself: What accomplishments will our nonprofit be celebrating 10 years from now?

How great would it be if your local paper ran the headline, "Local nonprofit receives \$10 million estate gift!"

- *Be honest.* Was your first thought, I won't be with the organization in 10 years?
- *Be present.* Fundraisers are only as good as their passion for the mission.
- *Be strategic.* Once you realize how important fundraising is to the mission, learn everything you can about how to raise more money.

Strategic Plan

A strategic plan covers:

Internals

- Staff and board guidance
- Job responsibilities
- Examination of practices, policies, mission and vision
- Finances, etc.

Externals

- Public perceptions and reputation in the community
- Brand
- Communication documents
- Donors appreciation procedures, etc.

Strategic Plan

The Strategic Plan should:

- Address your organizational and fundraising goals
- Prioritize the goals
- Access your staff, skills, funding, resources and limitations for meeting those goals
- Place the information in a format that can inform your board, inspire your staff and drive further discussion through the year

Strategic Plan

The Strategic Plan should:

- Answer the question: "If we had all of the money in the world for this organization, we would..."
- Demonstrate that your organization will be around for a long time
- Underscore your mission
- Align the team on a shared vision
- Establish a framework for success
- Serve as a powerful fundraising tool

Continue to revisit the Strategic Plan throughout the year in order to move closer and closer to your objectives.

Assess your case for support

A strong case is part

- Heart tigger
- Business plan
- Brand extender
- Organization overview
- Motivator, reinforcer
- Confirmer, justifier
- Confidence builder

A strong case

- Connects with prospects and volunteers
- Tells your story, taps the passion
- Shows you are smart and well managed
- Defines your need and solution
- Invites involvement, investment

Assess your case for support

A strong case

- Focuses on benefits – not features
- Stresses differences gift will make and for whom
- Proves you are a smart investment:
 - Solid plans, vision
 - Solid history, present
 - Solid management, leadership
 - Fiscal responsibility

A strong case is

- the core document for all campaign communication
- a sales tool – develop, design and use it accordingly

Assess your case for support

A strong case

- On its own, rarely raises a single dollar
- Cannot replace solid fundamentals of fundraising, only support them

People, armed with a case statement, raise money.

Assess your case for support

So what's inside?

- Throughout: Benefits, not features
- Introduction: Sets stage, makes first ask
- Mission, vision: Sets standards, values
- Brag sheet: Highlights strengths, victories
- History: Recalls legacy, tradition
- Need defined
- Solutions explained
- Campaign budget breakdown
- Statement of nonprofit status
- Campaign leadership; good stewards
- Beneficiary quotes, profiles
- Leadership quotes and/or letter
- Call to action, thank you

Assess your brand and its consistency

What is brand?

- A place in people's minds
- The sum of relationships and experiences
- Promise and expectation
- Tangible and intangible connections
- Image and personality
- Packaging and presentation
- Your competitive advantage
- Who you are...consistently, believably, credibly
- That unchanging essence that defines you to the world...and to yourself

Assess your brand and its consistency

Your Ultimate Goal

Turn...the uncertain brand supporters
The brand supporters into believers
The believers into advocates
And the advocates into brand champions



General Fundraising Philosophies

Remembering these five basic concepts can increase your ability to secure charitable giving.

"No one wants to give money away."

They want to make a positive difference in the lives of others or in the life of their community.

"Communication is the essence of appreciation."

If the only time your organization is communicating with donors is when you are asking for money, the wrong dynamic is in play.



General Fundraising Philosophies

"Capacity plus interest equals a charitable gift."

An organization can do very little about capacity, but it can create interest in the hearts and minds of prospects.

"Ask for a specific amount to maximize giving."

How does a donor know what to give if an organization does not share its need with them?

"I am providing you a chance to make a difference."

Psychologically, volunteers and staff members must believe that when they participate in a cultivation or solicitation session with a prospect they are doing that prospect a favor.



Questions?

Comments?

Discussion?

Matthew J. Beem, PhD(c), CFRE
President and CEO
matt@hartsookcompanies.com
866-630-8500, ext. 8430



Thank you.



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www.hartsookinstitutes.org



www.hartsookcompanies.com

866.630.8500 | info@hartsookcompanies.com | P.O. Box 410046 | Kansas City, Missouri 64141
