

March 2018

**Hartford Foundation for Public Giving**

**Nonprofit Support Program's Spring Event | April 5, 2018**

# **Successful Fundraising from Individuals: Your New 3-Year Plan**

Add these resource materials to your copy of the PowerPoint slides.

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## **Opinion or expertise? There is a difference!**

You either like or dislike Picasso's work. That's your personal view or attitude. But art experts (body of knowledge and expertise) judge Picasso as a seminal artist, a game-changer.

You hire a lawyer and pay attention to what she says without wasting too much time offering your ill-informed or uninformed opinions about the law. You hire a doctor and don't second-guess her surgical methods.

There's a substantive difference between personal opinions that are not based on expertise – and informed opinions, which are based on expertise and body of knowledge and research.

Unfortunately, the nonprofit sector seems full of opinions, and far too many are the bad kind, ill informed and uninformed.

For example: Your boss doesn't like the direct mail letter you wrote. Your letter is based on the body of knowledge<sup>1</sup> and research from people like Mal Warwick, Sean Triner, Jeff Brooks<sup>2</sup>, Jerry Huntsinger, and Tom Ahern<sup>3</sup>.

But your boss isn't "comfortable" with the letter. In his opinion, the letter doesn't represent the agency well.

Who is the fundraising expert at your agency? Not your boss. (And not your board chair or any of your board members either, by the way!) The expert better be you!

Here's another example: Your board chair, the bank CEO, runs a tight board meeting. She uses the executive committee<sup>4</sup> to work through all issues before the board meets. Committees report at each meeting. Board dialogue<sup>5</sup> is limited.

As the executive director, you've studied the body of knowledge about governance<sup>6</sup> by attending workshops and reading books and research. You also serve on boards. You're trying to improve governance at your agency – and that certainly includes board meetings. But your board chair graciously chuckles and says, "I've served on more boards than you are old. We'll stick with my tried and true approach."

Your board chair thinks her years of board service make her an expert in governance and board development. But she's wrong. Experience alone doesn't make her an expert. She needs the book knowledge and the research findings.

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<sup>1</sup> Visit [www.sofii.org](http://www.sofii.org), the global Showcase for Fundraising Inspiration and Innovation.

<sup>2</sup> Subscribe to Jeff's free daily blog, [www.futurefundraisingnow.com](http://www.futurefundraisingnow.com).

<sup>3</sup> Subscribe to Tom's free e-news about donor communications. Read his books. [www.aherncomm.com](http://www.aherncomm.com).

<sup>4</sup> I'm on a worldwide mission to destroy all executive committees. Read my web column at [www.nonprofitquarterly.com](http://www.nonprofitquarterly.com). And see my article in NPQ's print edition.

<sup>5</sup> Visit the Free Download Library on my website. Read "Conversation is a Core Business Practice" in the library section called Other Nonprofit Resources.

<sup>6</sup> Visit the Free Download Library on my website and see all the resources for governance and boards.

### **Too-often lousy fundraising and governance**

There's something else that severely limits the quality of personal opinions and experience in fundraising and governance: the too-often lousy fundraising and governance that people observe and participate in...and then copy.

For example: I find that most boards are somewhat (or lots) dysfunctional. I'm talking about the supposedly sophisticated boards with their supposedly knowledgeable staff and their power broker board members. Yes. Most boards are not that good. And it's not just me who says so. Read the research and the for-profit and nonprofit sector publications like *Harvard Business Review* and *Nonprofit Quarterly* and and and ...

Another example: Fundraising isn't doing all that great either. There's the donor retention crisis that began before the 2008 recession. The lack of knowledge about donor satisfaction. Insufficient personal face-to-face solicitation. Lousy donor communications. Too many fundraisers don't know the body of knowledge or follow research. And those that do too often get stymied by bosses and boards with personal opinions.

### **Living in a fact-free zone**

There's another problem we have in our work – and in our society at large: fact denial and fact deniers. “We live in a world where scientific knowledge is subordinated to political and religious dogma, where intellect and expertise are denigrated as elitist, where demands proliferate that history be taught as an exercise in national self-congratulation, not critical self-examination.”<sup>7</sup>

Instead of acting as critical thinkers<sup>8</sup>– learning the body of knowledge and using good research – too many people assert their personal opinion. And these people demand that all others accept the validity of their personal opinions. In fact, parts of our society (and our enterprises, no matter the sector) too often deny facts and assert opinion. Global warming anyone? There's actually a science of why we don't believe science<sup>9</sup>.

Have you heard of the movie *Anonymous*? It's about Shakespeare not writing Shakespeare...the suspicion that someone else wrote Shakespeare... (And, most likely an English lord wrote Shakespeare because how could a commoner write something as great as Shakespeare! In this movie, the author of Shakespeare is supposed to be Edward de Vere, 17<sup>th</sup> Earl of Oxford.)

When the movie premiered, a *New York Times*<sup>10</sup> Op-Ed (James Shapiro, October 17, 2011) wrote this about fact or fiction: “*Anonymous* offers an ingenious way to circumvent...objections: there must have been a conspiracy to suppress the truth of de Vere's authorship; the very absence of surviving evidence provides the case.

“In dramatizing this conspiracy, Mr. Emmerich [film director] has made a film for our time, in which claims based on conviction are as valid as those based on hard evidence. Indeed, Mr. Emmerich has treated fact-based arguments and the authorities who make them with suspicion. As he told an MTV interviewer...when asked about the authorship question: ‘I think it's not good to tell kids lies in school.’”

Are you wondering which is the lie? Shakespeare or Lord de Vere?

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<sup>7</sup> Eric Foner, May 13, 2012 commencement address for doctoral candidates at Columbia University, published in *The Nation* magazine, June 25, 2012, [www.thenation.com](http://www.thenation.com).

<sup>8</sup> Read the marvelous *Miniature Guide to Critical Thinking*, [www.criticalthinking.org/store](http://www.criticalthinking.org/store). Also available at [Amazon.com](http://Amazon.com).

<sup>9</sup> Read Chris Mooney's marvelous article in *Mother Jones*, “The Science of Why We Don't Believe Science,” [www.motherjones.com/politics/2011/03/denial-science-chris-mooney](http://www.motherjones.com/politics/2011/03/denial-science-chris-mooney).

<sup>10</sup> [www.nytimes.com](http://www.nytimes.com)

### **Stop the uninformed and ill-informed opinions and the fact-deniers!**

So let me summarize, after this rather long rant! Uninformed or ill-informed personal opinion is irrelevant to the work we do. These opinions – too often promoted by whichever “powers that be” control your life or our agency or our world – stop forward progress. These opinions distract us from the right work and compromise integrity.

The job of good and competent professionals – and ethical leaders – is to graciously and forcefully disengage from uninformed and ill-informed opinions.

Read Seth Godin’s<sup>11</sup> wonderful blog from April 9, 2012, “Is everyone entitled to an opinion?” Seth responds: “Perhaps, but that doesn’t mean we need to pay the slightest bit of attention. There are two things that disqualify someone from being listened to... Lack of standing... No credibility.”

You and I need to pay particular attention to “no credibility.” As Seth notes, “An opinion needs to be based on experience and expertise.” So you and I better acquire and maintain that expertise and experience.

**P.S. Check out Scott Adams’ *Dilbert* cartoon from October 7, 2012... “I like to have opinions. But not informed ones.”<sup>12</sup>**



I’m proud to be described as “one of the most thoughtful, inspirational, and provocative leaders in the philanthropic sector.” In January 2018, I began my 3<sup>rd</sup> year as a consultant, specializing in fund development, strategic planning, and board development. I work with all types and sizes of nonprofits.

I’m also a teacher, speaking at conferences worldwide, and serving as faculty in the graduate program for philanthropy at Saint Mary’s University, MN. My books *Keep Your Donors* and *Strategic Fund Development* (released in its 3<sup>rd</sup> edition in 2011) are standards in the field. My 2014 book *Firing Lousy Board Members – And Helping The Others Succeed* receives rave reviews. I publish a monthly free e-news, and blog weekly on my website – called Simone Uncensored.

As a volunteer, I founded the Women’s Fund of RI, chaired CFRE International (the baseline certification for fundraisers), and regularly serve on boards. I’m Immediate Past Chair of Planned Parenthood of Southern New England (CT and RI). I also chair the Advisory Board of the Hartsook Centre for Sustainable Philanthropy in the U.K.

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<sup>11</sup> Subscribe to Seth’s free daily blog, [www.sethgodin.com](http://www.sethgodin.com). And read Seth’s great books like *Tribes*, *The Big Moo*, *Permission Marketing*, and *Linchpin*.

<sup>12</sup> [www.dilbert.com/strips/comic/2012-10-07](http://www.dilbert.com/strips/comic/2012-10-07)

## Job description of the board of directors

The board of directors is legally and morally (ethically) accountable for the health and effectiveness of the organization. The board ensures that the organization achieves its mission in an ethical, transparent, accountable, and prudent manner.

The board's job is governance, the ongoing process of due diligence whereby the board operates as a collective to ensure corporate health and effectiveness. Specifically, the board is accountable for the functions described below.

The board works in partnership with its chief executive (CEO). The executive provides leadership and support, enabling the board to carry out its governance responsibility.

### *Board Functions/Scope of Authority*

All of these functions are accomplished as a group – at board meetings – through review of information, strategic questioning, conversation, and decision-making.

1. Articulate values and mission, and set standards, controls, and policies. Ensure that all the organization's programs, activities, and operations adhere to these.
2. Ensure that the organization is relevant to the community through processes that monitor the external environment and define vision, direction, and strategy.
3. Define and monitor key areas of performance compared with short- and long-range strategy and plans, assess results, and ensure that steps are taken for continuous quality improvement in all areas.
4. Ensure financial sustainability and intergenerational equity, e.g., operations, reserves, and capitalization.
5. Ensure that adequate risk management is in place, e.g., safety and security, insurance, data backup, CEO succession, board officer and board member succession, etc.
6. Define criteria for board membership, ensure proper recruitment of candidates, elect members and officers, and ensure proper orientation and development of board members.
7. Define and enforce parameters of the board's work, including its committees and task forces, and the role and performance of the individual board member. Assess effectiveness.
8. Define the role of and hire the CEO. Appraise performance; set compensation; reward competence; and, if necessary, replace the individual.
9. Ensure compliance with relevant laws and regulations.
10. Ensure effectiveness of management without intruding in management's role and authority.

11. Act as a think tank and sounding board regarding organizational health and effectiveness and the marketplace environment without compromising management's authority.

Note: The challenge is to ensure that the boards – including its individual members – recognize that #10 and #11 are neither a directive nor an authoritative function.

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You do these things at your board meetings. Not every single item at every single board meeting. But some of these items at each board meeting. And all of these items at some point during the year.

This job description for the board comes from *Firing Lousy Board Members – And Helping the Others Succeed*, by Simone P. Joyaux, ACFRE, Adv Dip. Published in February 2014 by Charity Channel Press, [www.charitychannel.com/charitychannel-press](http://www.charitychannel.com/charitychannel-press).

For more about the board, governance, and the individual board member – and lots more! Visit the Free Download Library at [www.simonejoyaux.com](http://www.simonejoyaux.com).

## Performance expectations of you, the individual board member

(This document uses the terms “board member” and “board of directors,” referring to the governing group. Other organizations use other terms, e.g., trustee, governor, board of trustees, board of governors...whatever. The intent is the same. AND, this applies to all board members in any organization – regardless of the organization’s size or type or evolution or or or !)

Each Board member of this organization affirms the expectations outlined here and strives to perform accordingly. We treat all Board members the same when it comes to these expectations.

We clearly articulate these expectations during the recruitment process – and secure commitment prior to nomination. By accepting nomination or appointment, the individual confirms that this board service is one of his / her top volunteer and giving commitments.

### Specific performance expectations for every single board member:

1. Support and be an active advocate and ambassador for the organization’s values, mission, vision.
2. Participate in governance activities (group processes<sup>13</sup>), e.g., meeting preparation and performance
  - a. Act in a way that contributes to the effective operation of the Board. Work with fellow Board members and staff to assure that the Board and its committees function well.
    - Focus on the good of the organization, independent of personal agenda, self-interest, or influence of others.
    - Support the organization’s policies and procedures for conducting business.
    - Maintain confidentiality of all work unless authorized otherwise.
    - Support Board decisions once these are made.
    - Help build a good corporate culture.
  - b. Regularly attend Board and committee meetings. Prepare for these meetings by reviewing materials and bringing materials to meetings.
  - c. Use conversation as a core business practice, asking strategic questions and participating in dialogue.
  - d. Be available to serve as a committee/task force chair or member. Be a prepared and active participant in committee and task force work.
  - e. Inform the Board of Directors of any potential conflicts of interest, whether real or perceived, and abide by the decision of the Board related to the situation.
  - f. Respect the authority of the chief executive officer and staff; and, adhere to the limitations of the Board, its committees and individual Board members.
3. Personal development
  - a. Keep informed about the organization, its issues, and its connection to the community through active participation within the organization and outreach outside the organization. (Another way of saying this might be: Participate in opportunities to engage in/understand the organization’s mission.)

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<sup>13</sup> Remember, corporate governance is the process whereby a group of people ensure the health and effectiveness of the organization.

- b. Participate in professional development opportunities to strengthen corporate governance and advance the organization’s effectiveness through learning<sup>14</sup>. Participate in appraisal of own performance and others, as called upon.
- 4. Individual leadership acts<sup>15</sup> outside board and committee meetings
  - a. Promote a culture of philanthropy.
  - b. Help support the charitable contributions operation of the organization. Specifically:
    1. Reach into diverse communities and help identify and cultivate relationships to support the organization as donors, volunteers, and advocates.
    2. Give an annual financial contribution to the best of personal ability<sup>16</sup>. If the organization launches a special campaign, give to that, too.
    3. Participate in fund development by taking on various tasks tailored to your comfort and skills.
  - c. As appropriate, use personal and professional contacts and expertise<sup>17</sup> to benefit the organization, without compromising ethics or trespassing on relationships.
- 5. Agree to step down from Board position if unable to fulfill these expectations.<sup>18</sup>

### **What happens with all-volunteer (or small) organizations?**

Without staff, board members typically carry out the management tasks. However, it is still necessary to distinguish between governance (the work of the board) and management (the work of staff, whether paid or volunteer.)

With an all-volunteer organization, I would add an additional section. For example:

#### Help carry out management tasks

As an all-volunteer organization, board members do both governance and management. Items in performance expectation #4, “individual leadership acts outside board and committee meetings,” are not considered management tasks. These are board member actions.

There is a distinction between governance and management and we are ever vigilant to ensure this distinction. One way we reinforce the distinction is by not intermingling governance and management conversations at board meetings.

Board members take on various tasks from the management task list, reviewed regularly. While doing management tasks, board members maintain a level of autonomy that does not require group decision-making like governance does. The board chair likely provides the coordinating and leadership services that an executive director typically does.

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<sup>14</sup> Suggested by Cohort 20, Saint Mary’s University Masters Degree in Philanthropy and Development.

<sup>15</sup> Board members do more than participate in governance. Board members are considered leadership volunteers.

<sup>16</sup> Some organizations make this type of statement: “Consider this organization one of your top 2 – 3 charitable commitments.” What do you think of that? Why would an organization include that statement?

<sup>17</sup> Each candidate is invited to join the Board in order to provide specific expertise to the governance process. The individual is informed of this need – and agrees – prior to nomination or appointment.

<sup>18</sup> Usually, board members need help understanding that it is time to step down. See my book *Firing Lousy Board Members – And Helping the Others Succeed*, for lots of details about how to evaluate, how to encourage, etc.

Philanthropy means voluntary action for the common good<sup>19</sup>. Fund development is the essential partner of philanthropy. Fund development makes philanthropy possible by bringing together a particular cause and the prospects and donors who are willing to invest in the cause. The goal is to acquire donors of time and money who stay with the charity. This is done through the process of relationship building. With the donor at the center, fund development nurtures loyalty and lifetime value, thus facilitating philanthropy. You know if your relationship building works because your retention rates rise and the lifetime value of your donors and volunteers increases. (From *Keep Your Donors: The Guide to Better Communications and Stronger Relationships*.)

**So what does this mean in practical terms? Here are some basics:**

- 1. First, understand some basic distinctions:**
  - a. Predisposed:** An individual, business, or some other entity whose interests and actions suggest a possible inclination or susceptibility towards your organization's cause / mission. ("Suspect" is more common terminology. But who wants to hear anyone referred to in such a pejorative manner?)
  - b. Prospect:** An individual, business, or some other entity that has demonstrated an interest in your cause / organization. The individual has raised his / her hand by buying your services or asking to join the mailing list or... In some manner, in some way, the individual, business or entity has raised its hand signaling interest in your cause and your organization.
  - c. Donor:** An individual, business, or some other entity that has given a gift of time or money or service to your organization.
- 2. Nurture a **culture of philanthropy** in your organization.** It's the right attitude that matters as much as anything. Culture refers to the personality / attitude of your organization. A culture of philanthropy means that everyone accepts and celebrates the beauty of philanthropy and donors, no matter the type or size of gift.
- 3. Build a **donor-centered**<sup>20</sup> organization.** Focus on the donor or prospective donor. "It's not what your organization is selling, it's what I'm buying that counts. I'm interested in my interests, my motivations and my aspirations. Match those and then I'll give to you. Otherwise, leave me alone!"
  - Don't universalize your own passion. Not everyone is interested in your cause, no matter how convincing you are. Do not try to convince them! That's offensive. Instead, find those who share your passion.

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<sup>19</sup> Robert L. Payton. Payton was the first professor of philanthropics in the U.S. and former head of the Center on Philanthropy at Indiana University / Purdue University in Indianapolis.

<sup>20</sup> See the Donor Centric Pledge in *Keep Your Donors* and in the Free Download Library at [www.simonejoyaux.com](http://www.simonejoyaux.com). Donor-centered is like customer-centered.

4. **Loyalty** is the holy grail of fundraising – just like loyalty is the holy grail of any business. Here’s my equation: Loyalty = Donor-centered organization + Relationship-Building Program (donor-centered communications + extraordinary experiences.)  
**And what are the key drivers of loyalty lifetime value (LTV)?** Trust, commitment, engagement, and satisfaction. [From Adrian Sargeant’s research. Adrian is the world’s leading academic fundraising researcher.]
  - a. Donors are aware of consequences: Believing that “someone might be hurt if I don’t give.”
  - b. Your organization’s service quality is good. “Do you anticipate questions, promptly thank donors? Are you easy to work with? Do you value your customers?”
  - c. They trust you.
  - d. They share your beliefs.
  - e. You’ve established a personal link: You give the donor credit.
  - f. They’re learning: Are you taking them on a journey?
  - g. Multiple engagements: Every two-way interaction significantly improves donor retention.
  
5. Giving is an **emotional act**, not a financial transaction. Your organization is the means by which donors live out their own interests and aspirations. (See the separate handout, “Emotions” for more detail.)
  - a. Neuroscience<sup>21</sup> and psychological research document that all human decisions are triggered emotions<sup>22</sup>. Then rationale steps in. “The essential difference between emotion and reason is that emotion leads to action, while reason leads to conclusions.” (Neurologist Donald B. Calne, Canada)
  - b. Research from the direct mail industry says that people give in response to one or more of 7 emotions: greed, guilt, anger, fear, flattery, exclusivity, and salvation. People move from one emotion – e.g., anger – to hope, by using your agency as the means to make change. Tom Ahern refers to this partnering of emotions as “twin sets.”
  - c. Threat of loss is more motivating than the promise of gain. [Robert Cialdini, PhD]
  
6. Engage **volunteers**, including board members and others. Make sure your staff effectively enables volunteers to participate in this meaningful work of identifying, cultivating, and soliciting. (See my separate handout about enabling. And read *Strategic Fund Development*, 3<sup>rd</sup> edition for lots of details about the enabling concept.)
  
7. **Don’t trespass** on personal and professional relationships. Instead, use connections to identify those who might be predisposed to your cause. If you cannot qualify them as prospects (and it’s their choice!), leave them alone.

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<sup>21</sup> Thanks, in part, to MRIs, we now have the field of neuroscience. We can see how the brain works.

<sup>22</sup> See research by Drs. Bechara and Damasio, described in Tom Ahern’s books on donor communications. [www.aherncomm.com](http://www.aherncomm.com). By the way, psychologist W. Gerrod Parrott identifies many more than 7 emotions. Read all about emotions in *Keep Your Donors: The Guide to Better Communications and Stronger Relationships*, by Joyaux and Ahern.

8. Effective fund development is like **permission marketing**<sup>23</sup>; people opt in or opt out. “Permission marketing is the privilege (not the right) of delivering anticipated, personal and relevant messages to people who actually want to get them...treating people with respect is the best way to earn their attention. Permission doesn’t have to be formal but it has to be obvious.” (From Seth Godin’s book and blog)
9. More **visibility** does not produce more contributions. Everyone focuses on his / her own interests. Your agency can be more and more visible – but if I’m not interested, I’m not paying attention. And I sure won’t send money. Just ask Simone about the NCAA basketball championship and the World Cup! (Or read about these experiences in *Keep Your Donors*.)
  - a. It’s okay if someone doesn’t know who your agency is or what it does. Tell them, if they’re interested. That’s identifying the predisposed.
  - b. Do not solicit someone unless you know for sure that the person knows about your agency.
  - c. Where do you need to be visible? Among your current donors, because you want to build their loyalty. Absence does not make the heart grow fonder –it’s out of sight and out of mind!
10. You have to **give first**. (*You* means each board member, the CEO and development officers, and fundraising volunteers.) Why? Because you cannot represent an agency or cause without demonstrating your own financial and volunteer investment.
11. **Why do most people give?** Because they’re asked. It’s that simple. But only ask those who are interested. Ask the right prospect for the right amount at the right time for the right project in the right way with the right solicitor.
12. Build an **individual giving program**. Each year, individuals give the largest portion of philanthropic gifts in North America. What about elsewhere? And individuals are more loyal donors than foundations or corporations.
13. Fund development is a **process and a profession**. The profession is founded on ethical principles and standards<sup>24</sup>, based on a well-researched body of knowledge<sup>25</sup>, and protects the public through voluntary certification of professionals. Personal opinion – without the body of knowledge – doesn’t and shouldn’t count for much.

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<sup>23</sup> Term introduced by Seth Godin in his 1999 book *Permission Marketing*. Godin contrasts permission marketing to interruption marketing, the traditional advertising / marketing approach. You know, the billboards and glitzy ads - and sending me a newsletter that I didn’t ask for.

Identify the predisposed – those you suspect might have interests similar to your cause / organization – and introduce yourself (personally is usually best, e.g., through a cultivation gathering or one-on-one). Then, if the person (or corporation or foundation) expresses interest, that gives you permission.

Godin observes: “Rather than simply interrupting a television show with a commercial or barging into the consumer’s life with an unaccounted phone call or letter [or in fundraising, the newsletter or a solicitation], tomorrow’s marketer [and top notch fundraiser] will first try to gain the consumer’s consent to participate in the selling process.” [Bracketed comments are mine, not implied by Godin.]

<sup>24</sup> See the *Donor Bill of Rights* and the *AFP Code of Ethical Principles and Standards of Professional Practice* at [www.afpnet.org](http://www.afpnet.org).

<sup>25</sup> See the Test Content Outline at CFRE International ([www.cfre.org](http://www.cfre.org)), the baseline certification for fundraisers worldwide.

14. Most **fund development problems** are actually not fund development problems. Most problems relate to other areas of operation. Fix the real problem. (Read *Choosing your road* in the Free Download Library on my website.)
15. A **balanced funding mix** of solicitation strategies and donor sources ensures stability and credibility. Whenever possible, the best way to solicit a gift is through face-to-face solicitation.
16. And by the way, **how do people in the U.S. define a good person?** There are 9 key descriptors: Kind. Caring. Compassionate. Helpful. Friendly. Fair. Hard-working. Generous. Honest. (From Jen Shang's research. Jen is the world's first philanthropic psychologist. Check out her work.)

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**YES! A small shop can do this. We're talking about minimums here. Use staff. Use volunteers.**

Put your organization on the right path

## **Successful fundraising from individuals: Your new 3-year plan**

**For example...Year One...Modify for where your organization is.**

<b>Activity</b>	<b>Resources</b>	<b>Timeframe</b>
Talk with the board. Choose to invest in fundraising. Investment. Not a cost center.		
Assign someone to be in charge of fundraising, e.g., the executive director or a fundraising officer.		
Create a donor-centered organization.		
Review your organizational culture. Nurture a culture of philanthropy at all levels of staff and board/board members.		
Learn more about fundraising. Continue learning about the body of knowledge, research, and best practice.		
Distinguish between the board and the board member. Establish 2 policies: Board job description. Board member performance expectations. Orient everyone accordingly: Implement and enforce.		
Institutionalize this throughout your organization.		
Secure annual financial contributions from all board members – to the best of their personal ability. And, of course, the chief executive officer and chief fundraiser must give, too.		

For example...**Year Two**...Modify for where your organization is.

Activity	Resources	Timeframe
Continue everything from Year One. More and more. Better and better.		
Establish the optimum measures.	See Measures in Joyaux's Free Download Library.	
Learn to write better – and write the right stuff.	Apply all of Tom Ahern's teachings / publications.	
Create and carry out a comprehensive relationship-building program. (Donor-centered communications + extraordinary experiences.)	Sample books: <i>Keep Your Donors</i> . <i>Building Donor Loyalty</i> . <i>Relationship Fundraising</i> .	
Begin segmenting your donor base by solicitation strategy, e.g., direct mail, face-to-face personal solicitation, etc.		
Design your fiscal year strategic fund development plan – and do so every year.	<i>Strategic Fund Development, 3<sup>rd</sup> edition</i> . Chapter about how to create the plan. Appendices (including sample plans) located on the publisher's website.	
Collect beneficiary stories and donor stories.		

For example...**Year Three**...Modify for where your organization is.

Activity	Resources	Timeframe
Continue everything. More and more. Better and better.		
Keep measuring. Maybe add more measures.		
Launch personal face-to-face solicitation. Involve board members. And if you're already doing it, then do more!		
Now it's time to invite loyal donors to join your legacy society. Remember: The largest gift most people ever give is a gift in their will. And the top prospects for gifts in wills – loyal donors.		

**Sample content for a strategic fund development plan – 1 or multiple fiscal years**

1. Non-financial goals. For example:
  - a. Strengthening organizational culture
  - b. Learning and applying the body of knowledge
  - c. Establishing a fund development committee of the board
2. Financial goals, presented by source and solicitation strategy
3. Relationship-building program
  - a. Donor-centered communications
  - b. Extraordinary experiences
4. Solicitation strategies
  - a. Direct mail
  - b. Proposals/grant applications
  - c. Personal face-to-face solicitation
  - d. Fundraising events
5. Measures
6. Assignments of accountability, e.g., boards, board members, staff...

## Suggested resources from Joyaux and Ahern



### Training and conference opportunities: Live and online

- AFP International and its local chapters. [www.afpnet.org](http://www.afpnet.org)  
(Association of Fundraising Professionals)
- Bloomerang. Amazing fundraising database. Free webinars and blogs – whether or not you use that product. [www.bloomerang.co](http://www.bloomerang.co).
- Moceanic. <https://www.moceanic.com>
- Third Sector New England. <http://www.tsne.org>

### Newsletters (print and online) and blogs

- Ahern. [www.aherncomm.com](http://www.aherncomm.com)
- Joyaux. [www.simonejoyaux.com](http://www.simonejoyaux.com)
- Jeff Brooks. [www.futurefundraisingnow.com](http://www.futurefundraisingnow.com)
- *Nonprofit Quarterly*. [www.npq.org](http://www.npq.org). Quarterly print publication and daily online newsletter.

### Books

- *The Ask*, Laura Fredricks
- *Firing Lousy Board Members – And Helping the Others Succeed*, Joyaux Associates
- *Fundraising Principles and Practice*, Sargeant and Shang
- *Keep Your Donors: The Guide to Better Communications and Stronger Relationships*, Ahern and Joyaux
- *Making Money with Donor Newsletters*, Ahern
- *Major Gift Fundraising for Small Shops*, Eisenberg
- *Relationship Fundraising*, Burnett
- *Retention Fundraising: The New Art and Science of Keeping Your Donors for Life*, Craver
- *What Donors Want – and Why” The Ultimate Guide to Successful Fundraising Communications*, Ahern
- All of Kay Sprinkel Grace’s books
- See CharityChannel, major publisher of books for the nonprofit sector. And also an online community with presentations and newsletters and ....

And so many many many more really good ones.

### Research

- Hartsook Centre for Sustainable Philanthropy research
- Lilly Family School of Philanthropy research
- Fundraising Effectiveness Project (FEP): AFP and the Urban Institute
- Blackbaud’s Target Analytics