



# Leveraging Leadership to Propel Fundraising Success

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# About CCS

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and management firm

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Clients are among the most  
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# Our Discussion

1. The CEO/DoD Partnership
2. Empowering Your Board
3. Moves Management: The Role of Leadership
4. Best Practices: Tracking Activity
5. Questions

# The CEO/DoD Partnership



# Key Challenges

- What is your greatest challenge in working with your Executive?
- What percentage of his/her time does your Executive spend on fundraising?



# Roles and Responsibilities

Executive	CDO / Director of Development
Designing, Developing, and Implementing Strategic Plans	Tasks and empowers the Executive, organization leaders, Board members, and key volunteers
Working with the Board of Directors	Educates the Executive, organization leaders, and Board members around best practices in fundraising
Financial Management and Fundraising	Maintains a portfolio of leadership and major gift prospects
Hiring, Managing, and Retaining Staff	Manages day-to-day fundraising operations
Community and Public Relations	Coordinates prospect research, identification, and management

# Executives and Fundraising

- “Executive” includes an organization’s CEO, Executive Director, etc.
- Time spent on fundraising ranges from 10% to 45%
- 55% of executives spend 20% or more of their time on fundraising
- 25% of executives specifically requested training in fundraising and regular updates on best practices
- 53% of executives perform a fundraising activity daily
- 43% of executives communicate daily with the Chief Development Officer
- 18% of executives feel unprepared for fundraising
- Major concern and key definition of success: **meeting fundraising goals**
- **Greatest challenge: fundraising**

# Navigating Challenging Personalities

## The Ghost



- Provides autonomy to the CDO/DOD
- Formerly active, now hard to reach
- Doesn't show up, hasn't followed through
- **Confide. Consult. Delineate. Decide. Be clear, polite.**

## The Boss



- Has a clear vision for the organization
- Used to giving orders
- Wants to make decisions, not do the legwork
- **Listen. Appreciate. Few tasks, important tasks.**

## The Expert



- Involved and sees value in the fundraising process
- Lots of opinions, sometimes doesn't seem to listen
- Thinks he/she knows better than others
- **Don't argue. Say "yes" when possible. Limit reach.**



# Navigating Challenging Personalities

## The Pro



- Fellow/former development professional
- Actually knows your job, challenges decisions
- **Re-delegate. Move forward. Keep including.**

## The Rogue



- Independent thinker
- Goes his/her own way regardless of team decisions
- Takes unilateral action or withholds information
- **Listen. Meet halfway. Accompany. Limit authority.**

## The Lover



- Develops great relationships
- Doesn't advance the relationship to an ask
- **Pair up for meetings. Partner makes the ask.**



# Instilling a Culture of Philanthropy

Include CDO/Director of Development as part of executive management team and as part of operational/strategic planning processes

Define a compelling vision

Empower CDO/Director of Development to work with the board



# Discussion

How have you helped your CEO become more comfortable with fundraising, and in turn, participate more?

# Empowering Your Board



# Ten Basic Board Responsibilities

1. Determine mission and purpose
2. Select the chief executive
3. Support and evaluate the chief executive
4. Ensure effective planning
5. Monitor and strengthen programs and services
6. *Protect assets and provide financial oversight*
7. Build a competent board
8. Ensure legal and ethical integrity
9. Enhance the organization's public standing
10. *Ensure adequate financial resources*

# Board and Staff Symbiosis



BOARD	STAFF
<b>Ensure</b> strategic vision is in place	<b>Implement</b> the vision
<b>Approve</b> budget and fundraising plan	<b>Prepare</b> budgets and fundraising plan
<b>Approve</b> fundraising policies and procedures	<b>Execute</b> fundraising plan within policies and procedures
<b>Lead</b> in philanthropy with personal annual and campaign support	<b>Coordinate</b> Board cultivation, solicitation, and stewardship
<b>Support</b> staff by engaging actively in fundraising activity	<b>Support</b> Board members in fundraising with strategy and activity management
<b>Monitor</b> performance of fundraising results	<b>Prepare</b> regular reports that evaluate fundraising efforts
<b>Ensure</b> funds raised are used in accordance with requirements	<b>Handle</b> operations and administration of the organization

# Board Member Giving

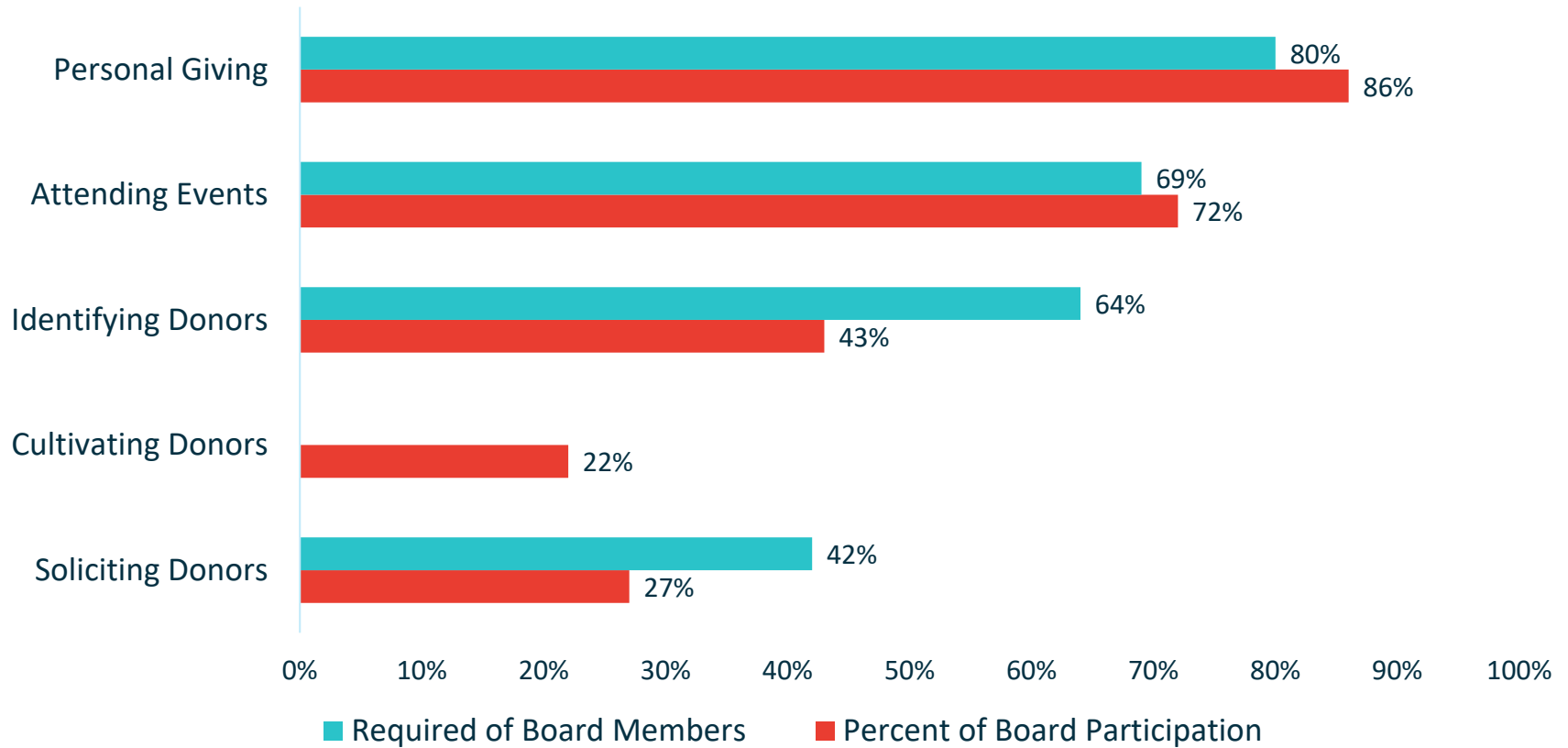
- Industry Standards
  - 46% of charities have 100% Board giving
  - Boards average 74% participation
  - 64% of charities require contributions from Board members
  - 100% Board giving should be an expectation
- The Give-and-Get Commitment
  - Many non-profit Boards require members to either contribute (give) or raise (get) a certain amount of funds for the organization



Sources: Board Source, National Center for Nonprofit Boards, National Governance Survey of Chief Executives

# Boards and Fundraising

## Requirements vs. Participation



Source: Board Source Leading With Intent, 2015



# What's Realistic? Board Engagement Options

## 1. Identification

- Share names of potential donors
- Conduct a prospecting session

## 2. Cultivation

- Sign or co-sign a gift request letter
- Make a phone call
- Invite someone to an event

## 3. Briefing

- Invite a friend or colleague to learn more about the organization or to go on a tour
- Offer guidance on the right information to present to a donor
- Join a donor briefing meeting

## 4. Solicitation

- Offer guidance on the right gift strategies
- Help prepare materials for gift request
- Join the request meeting

## 5. Thank You/ Stewardship

- Write letters to thank donors
- Make calls to thank loyal donors
- Participate in stewardship activities

# Motivating Your Board





# Discussion

How have you successfully engaged your board members in donor solicitation?

# Moves Management: The Role of Leadership

# Moves Management

**A move is an action taken to bring donors closer to the organization.**

- ✓ Tailored to the individual (donor-centered)
- ✓ Increases engagement
- ✓ Increases involvement
- ✓ Increases your understanding of the donor
- ✓ Advances your strategies and goals
- ✓ Leads to solicitation
- ✓ Results in a gift

# The ABCDs of Moves Management

	<b>DISCOVER</b> Low Interest/Involvement	<b>CULTIVATE</b> Some Interest/Involvement	<b>BRIEF</b> High Interest/Some Involvement	<b>ASK</b> High Interest/Involvement	<b>STEWARD</b>
<u>Objective</u>	<u>Identify &amp; Qualify</u>	<u>Initial Visit or Event</u>	<u>Visit and Pre-Ask</u>	<u>Solicitation</u>	<u>Recognize</u>
<u>Status of Prospect</u>	More information is required to better understand prospect & potential for involvement	Prospect has demonstrated interest but needs additional information to increase involvement	Prospect has responded positively to previous cultivation and is ready to hear specific plan	Prospect is ready for an immediate & direct request for financial support	Specific request has been made. We need a decision
<u>Action(s) to be Taken</u>	<ul style="list-style-type: none"> <li>Research</li> <li>Talk with leadership</li> <li>Visit with prospect</li> </ul>	<ul style="list-style-type: none"> <li>Schedule face-to-face meeting</li> <li>Invite to event, tour or other cultivation opportunity</li> </ul>	<ul style="list-style-type: none"> <li>Assemble materials</li> <li>Prepare recognition opportunities</li> <li>Develop strategy for meeting participants</li> <li>Conduct pre-briefing meeting</li> </ul>	<ul style="list-style-type: none"> <li>Develop personalized solicitation proposal</li> <li>Confirm solicitation team</li> <li>Schedule face-to-face meeting</li> </ul>	<ul style="list-style-type: none"> <li>Refine closing strategy</li> <li>Respond to questions</li> <li>Send personalized thank you letter</li> <li>Schedule follow-up meeting</li> </ul>
<u>The Meeting</u>	<ul style="list-style-type: none"> <li>Gather information about prospect &amp; connection to your organization</li> <li>Highlight accomplishments</li> <li>Outline plan</li> <li>Present challenges &amp; discuss proposed solutions</li> <li>Express desire to stay connected</li> </ul>		<ul style="list-style-type: none"> <li>Introduce &amp; present plan</li> <li>Review objectives, challenges &amp; accomplishments</li> <li>Highlight areas of need &amp; opportunities</li> <li>Review table of gifts</li> <li>Gauge level of interest &amp; determine gift request</li> </ul>	<ul style="list-style-type: none"> <li>Conduct face-to-face meeting with prospect</li> <li>Review progress and table of gifts</li> <li>Present personalized solicitation</li> <li>Invite prospect to consider gift amount</li> </ul>	<ul style="list-style-type: none"> <li>Thank prospect for consideration of gift request</li> <li>Reaffirm need &amp; impact of requested gift</li> <li>Handle response</li> </ul>
<u>Materials to Develop</u>	<ul style="list-style-type: none"> <li>Introductory letter</li> <li>Short case statement</li> </ul>	<ul style="list-style-type: none"> <li>Case for support</li> </ul>	<ul style="list-style-type: none"> <li>Table of gifts</li> <li>Prospect profile</li> <li>Briefing strategy</li> </ul>	<ul style="list-style-type: none"> <li>Personalized solicitation proposal</li> <li>Recognition opportunities</li> </ul>	<ul style="list-style-type: none"> <li>Follow-up letter</li> <li>Gift receipt letter</li> <li>Pledge card</li> </ul>

# Roles in Moves Management

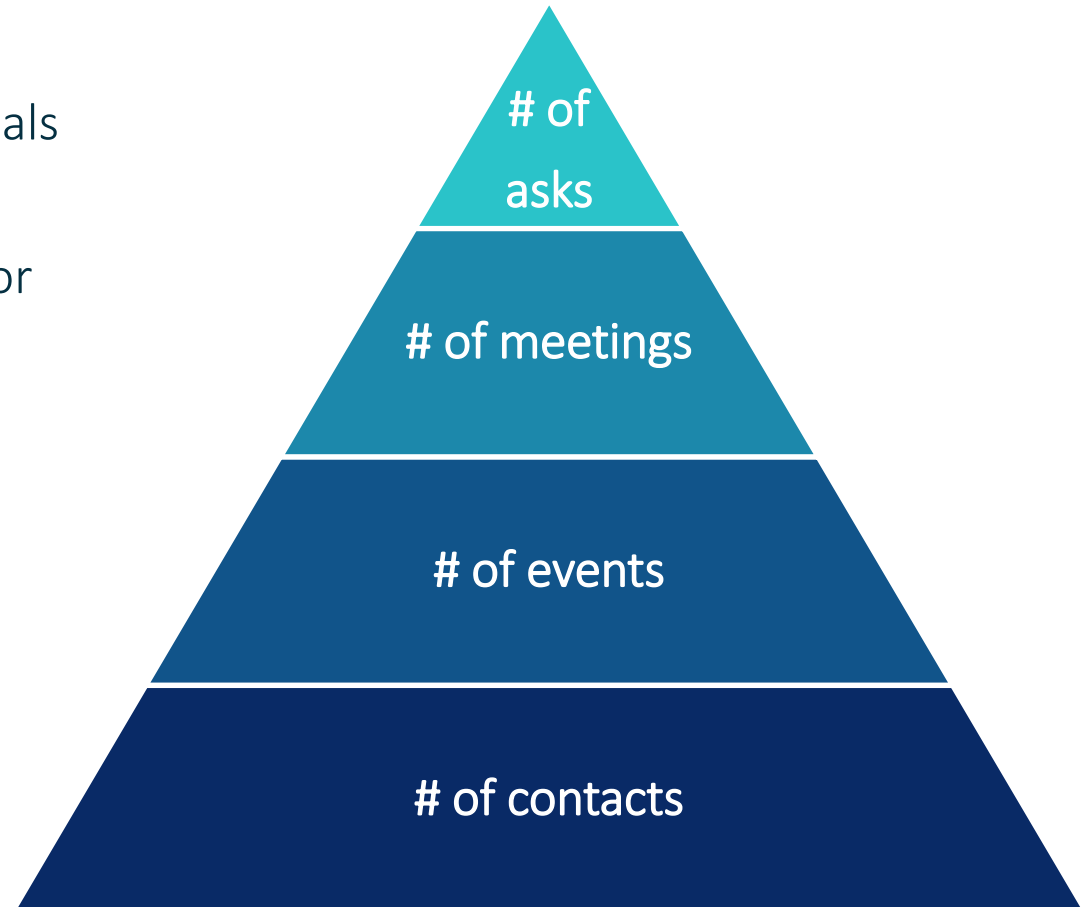
Key Tasks	Executive's Role	Support from the Development Staff
<b>Provide Contacts</b>	<ul style="list-style-type: none"> <li>Work with development staff and board to identify new prospects and volunteer leaders</li> </ul>	<ul style="list-style-type: none"> <li>Research and circulate contacts</li> </ul>
<b>Cultivate</b>	<ul style="list-style-type: none"> <li>Maintain a prospect list of 25-30 names</li> <li>Work with development staff to manage and move prospect list</li> <li>Be knowledgeable about institution's relevance to prospect/donor's interests</li> <li>Share vision and goals for institution</li> </ul>	<ul style="list-style-type: none"> <li>Provide script and materials</li> <li>Provide background brief/information on prospects</li> <li>Track and manage prospect list</li> <li>Coordinate prospect and donor meetings</li> <li>Collect and manage relevant information</li> </ul>
<b>Brief</b>		
<b>Solicit</b>		
<b>Steward</b>	<ul style="list-style-type: none"> <li>Maintain relationships not only with major donors but also friends and volunteers</li> <li>Work with all board members about fundraising role</li> </ul>	<ul style="list-style-type: none"> <li>Keep informed and update information</li> </ul>

# Tracking Activity



# Activity Benchmarks

- In addition to monetary goals
- Establish measurable, quantifiable benchmarks for activity for a successful prospect management program
- Evaluate program and individual performance against benchmarks



# A Partial List of Metrics

## Need to Have

- # of face-to-face moves
- # of moves by type
- # of asks
- # of gifts closed
- Amount (\$) of asks
- Amount (\$) of closed gifts

## Nice to Have

- # or prospects identified
- Average time in solicitation stage
- Conversion rate (# of asks/# of gifts)
- Percent of portfolio visited
- Donor renewal rate



# Recommended Metrics for Gift Officers



**40 to 50 moves per month** (phone calls, emails, events, mailings)



**10 to 15 meetings per month** (set specific goals for visits)



**2 to 3 solicitations per month**

# Discussion

Based on these recommendations, what might metrics for executive leadership or board members look like?

# Meetings Summary

<b>Bi-weekly or Monthly Team Meeting</b>	<b>Weekly Moves Management Meeting</b>	<b>Quarterly Prospecting Meeting</b>	<b>Weekly Development Priorities Meeting</b>
Share top priorities, achievements, challenges	Review top prospects, set strategy, update on last moves, and confirm next steps	Review newly identified prospects and remove inactive prospects	Discuss strategy for top 25 prospects, review development goals and progress
Include all staff	Senior staff and development staff	Development staff	Senior staff and development staff

Questions?





Laura Aikens  
Senior Vice President  
CCS Fundraising



Maeve Riley  
Senior Director  
CCS Fundraising

# Thank You

(312) 596-9300

[www.ccsfundraising.com](http://www.ccsfundraising.com)

