
Why and How the Fundamentals Still Work

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New is good. New media, donors, approaches. But as you move to the latest shiny new thing, you cannot abandon the basics. They work for all of the highest performing organizations, and they will work for you.

Start with “Why?”

Have you had a chance to either read Simon Sinek’s book, *Start with Why*, or [watch his 18-minute TED Talks® session on YouTube®](#)? If not, stop reading this and hop onto your computer.

Although he is speaking to for-profits, his message resonates for our sector too. Most of us explain our mission by stating what we do and how we do it. Easter Seals, for example, helps people with disabilities—from birth to old age—meet their full potential. Here’s how they do it: they are trusted experts who provide direct services, educate caregivers and the medical community, and advocate for their clients and others like them.

Are you inspired?

Now, try this. Every day 20,000 veterans commit suicide. Homelessness and unemployment among our nation’s veterans are two, three, and four times higher than for civilians. Easter Seals leads the way in preventing suicides and helping our nation’s veterans receive the physical and emotional therapy they need, gain suitable housing, land good jobs, and become thriving members of our communities.

In addition to an inspiring mission, you will need a strategic plan for achieving your five-year goal. Your fundraising and marketing priorities. How much will your dream cost? How will you pay for it? What portion must come from philanthropy?

And lastly, you will need a compelling case for support—written, visual, verbal—and a detailed fund development plan, calendar, and budget.

Next, ask “Who?”

Measurable goals—money, stewardship, donor and volunteer engagement. Action steps, responsible parties, due dates, and budget. Important metrics include retention rates, measurement of those who are solicited compared to those who say yes, and upgrades.

Name-by-Name Table of Gifts

This tool may be old-fashioned, but it’s still a must-have for nonprofits today. Once you know how much money you need, then figure out how many gifts, at what levels, and from how many donors are needed to achieve your goals.

Continued...

GIVING LEVEL	GIVING LEVEL	CUMULATIVE TOTAL	NUMBER OF POTENTIAL DONORS NEEDED (3 OR 4 TO 1)	NAMES OF INDIVIDUALS QUALIFIED	NAMES OF CORP. QUALIFIED	NAMES OF FOUNDATIONS QUALIFIED
\$1,000,000	1	\$1,000,000	3	0	0	Community Friend Foundation
\$500,000	2	\$2,000,000	6	May Good Tom Ready	0	Doing Good Foundation

Your ability to complete a table of gifts depends upon your capacity rating protocol and discipline.

Too many zeroes for you to relate? Not enough? Drop or add. But do build your name-by-name table. This illustration shows you how much work the organization still has to do. Set a monthly goal for adding names. Get your board and mission staff involved.

Below is a troubling name-by-name realized table of gifts. From whom did your gifts come from over the last three years? This will help you get retention data and plan for the upcoming year.

GIVING LEVEL	THREE YEARS AGO	TWO YEARS AGO	ONE YEAR AGO
\$1,000	Jane Tom Sally Fred Foundation X Corporation Y	Tom Sally Fred Foundation X Corporation Y	Sally Fred Foundation X
\$500	Mary Peter Paul Sam Foundation A Corporation Z	Mary Peter Paul Foundation A	Mary Peter Paul

Move to “how?”

Personal Relationships

At the heart of fundraising is our ability to build personal relationships with our donors. Know who they are, their values and motivations, and their engagement and stewardship preferences. The more you can get in front of your donors, the stronger the relationships will be.

The Transformational Partnership

Help from Your CEO

The CEO must allot at least 25% of his or her time to fundraising activity: strategizing, engaging, stewarding, and soliciting annual, major gift donors. Mark one development day per week for the next three months. Use those days to develop donor plans, make phone calls or visits, and write handwritten notes.

Board Leadership

You need individuals who believe passionately in your mission, vision, and work—leaders who give generously according to their means. They must carve out time for board service and fund development work, invest in the development office, and share their networks of influence and affluence. Chairs of the board, the committee on trusteeship, and the development committee must have these qualities and levels of commitment in spades.

Chief Development Officer

Your chief development officer holds this partnership together, keeps everyone focused on what is important, and provides support and strategy.

Multichannel Balance

Balance your act: direct mail, email, phone, mobile, special events that gain a lot in revenue and don't steal your time, leadership annual giving, planned giving, and major gifts. Balance sources. What does your contribution pie look like?

Donor Engagement and Stewardship

The more engaged a donor is, the more likely he or she is to give. Do you have a robust suite of engagement opportunities that are interactive and include thinking, feeling, and doing components? Tapping into professional expertise and including family members can result in larger gifts.

Nothing raises more money than excellent stewardship. Thank donors within 24 to 48 hours. Pick up the phone, and call new donors. Six months after the gift, share the impact of giving through a variety of mediums from a variety of voices. Stewardship deserves a chapter of its own. When done well, it increases retention, upgrades, and bequests, and it feeds the major gift pipeline. It inspires viral marketing and passionate advocacy.

Make stewardship happen no matter what new or old fundraising strategies you employ.

2013 Contributions: \$335.17 billion by Source of Contribution

(in billions of dollars—all figures are rounded)



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