

Check out highlights from our recent Frontline Perspectives Executive Event below.

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# Frontline Perspectives

FOR NONPROFIT BOARD AND STAFF LEADERS

August  
2017

*Bryan Orander, president, Charitable Advisors*



## "We're too busy for major gift fundraising"

Last August, I attended a presentation in Fort Wayne given by three local nonprofit leaders reporting on a survey they had conducted of nonprofit development staff and their executive directors/CEOs. Their survey was intended to learn more about development staff, the roles and expectations they were asked to fulfill, and ultimately, why turnover was so high.

The results were generally informative, but one insight stood out for me - that for so many development directors, building donor relationships and major gift fundraising is viewed as something they do after all of the other urgencies and priorities of the organization have been addressed. Major gift cultivation comes after the big event, the newsletter, preparing for the board meeting, updating the website, filling in on a field trip where too few volunteers showed up, developing social media content, covering for other staff during illness, etc.

The conversations that I have with board and staff leaders frequently discuss major gift fundraising as a priority for their organization and a critical key to their financial sustainability - and frequent frustration with a lack of progress.

*Where do you start? How do you shift priorities?*

Even when you can carve out a little time, it can feel overwhelming to start building a major gift fundraising effort.

Begin with a short list of supporters (10-30) who you view as really believing in your work. Ultimately, you want to convey your impact and build a strong partnership with those donors and that will require time for preparation and relationship building. Here are three ideas from Bryan to discuss with your team:

**1) Make it a priority for as many people as you can (board, staff, and volunteers):**

This doesn't mean that everyone is a major gift fundraiser, but may mean that other people take on tasks that have often fallen to your development staff or Executive Director/CEO. It is a reasonable expectation for board members to be active as introducers and partners on calls with donors and prospects. It probably means the Executive Director/CEO spends more time planning and working with the development director. Volunteers might take on more development roles or take responsibilities off the development director's list.

**2) Build positive support and establish reasonable expectations:**

Cultivating donors is fundamentally different from presenting events or sending mailings or soliciting online donations. Larger gifts rarely happen quickly and the process of building your confidence and refining your story takes time. While there is a common statistic that major gifts take two years to develop, we instinctively know that you can't put a timeline on this type of exchange.

**3) Learn from someone who has done it before:**

We live in a DIY culture (Do-it-yourself) and that can be great if you are putting shiplap on your bathroom walls. But there are certain roles and tasks where it makes a huge difference to have a guide who has been there ahead of you. Lean on board members with past experience in capital campaigns and staff members who have sat across the table with generous individuals and gained some experience and comfort in those settings. Hire a fundraising consultant to train and coach your team. (See the Marketplace listings in the Not-for-Profit News.)

## Work with Charitable Advisors this Fall

As part of Charitable Advisors Expert Group Consulting Series, we will be partnering with T.J. McGovern this fall for a three-session program to develop your major gift fundraising efforts. During the 2 ½ hour working sessions, T.J. and the 4-6 participants will work together and individually to develop a graphic-presentation tool for each participant, plus a plan to use it in implementing your major gift efforts. T.J. brings a career of relationship-focused fund development in higher education and community-based nonprofits and loves to share his knowledge. Where else can you get a customized development plan and tool in 60 days for less than \$700?

Contact Bryan at 317-752-7153 or [Bryan@CharitableAdvisors.com](mailto:Bryan@CharitableAdvisors.com) to learn more or talk about applying these insights to your organization.



## QUICK TIP

### Where does your board meet?

Does it really matter where your board meets? Most of us think about room size and convenience first, but what other factors influence our ability to work effectively? How about finding ways to get board members closer to the work you do or the people you seek to serve? How can you create an element of learning? How can you set a more thoughtful frame of mind for board members?

Would you approach your discussions differently if your theater board met on the stage versus the board chair's business office? A classroom versus the administration building? A worksite versus the office? A bus touring your neighborhood? The church sanctuary versus the church basement?

Raise this question with a few of your board members and see what they think? Share your ideas with us at [Bryan@CharitableAdvisors.com](mailto:Bryan@CharitableAdvisors.com) so we can share them in a future "Quick Tip".



# LEARNING OPPORTUNITIES



## "1 2 3 and Done" Expert Group Consulting re-launches this fall

While the promotion of Charitable Advisors' new group consulting/coaching in the spring created lots of energy and positive feedback, we also heard that we did not provide adequate notice to arrange schedules for and budget to raise the program fee. (\$495 for two session topics, \$695 for three session topics).

As a reminder: The concept for "1 2 3 and Done" Expert Group Consulting is that in two or three working sessions (depending on topic) with an expert consultant and a cohort of other nonprofit leaders/staff, you will complete a project or produce a product that will advance your fund development or leadership efforts. We project savings of at least 70-80 percent compared to vetting and hiring a consultant to work on a similar project. Weigh the small investment against the additional funds you can bring in by year-end.

"1 2 3 and Done" means:

1. Work side-by-side with an expert consultant
2. Share ideas with peers in a group setting
3. Produce a tangible outcome/result, as well as gaining a general increase in subject knowledge

### Fall sessions

This fall, we will offer three topics:

- **Create a Donor engagement tool to launch your major gift effort with T.J. McGovern** (3 sessions) - Kick-off on Friday, September 29 (9:00-11:30 a.m.), Two later sessions to be set with the group
- **Capture compelling success stories with Nora Hiatt** (3 sessions) - Kick-off on Wednesday, September 27 (2-4:30 p.m.), Two later sessions to be set with the group
- **Succession Planning with Bryan Orander** (2 sessions) - Kick-off on Thursday, September 28 (8:00-10:30 a.m. or can start half an hour later), One later session on October 26

For more information, see our Frequently Asked Questions FAQ about Group Consulting sessions at:

## Possible sources for Group Consulting fee

- **Internal:**  
Check your consulting, professional development and fund development budgets.
- **Leadership:**  
Talk with your Executive Director/CEO or Finance staff about how this fits into organizational goals and priorities.
- **Development:**  
Talk with the Development or Marketing Committee of the board.
- **Board members:**  
Ask for one or more board members to pitch in to pay for all or part of the cost.
- **External:**  
Apply for an Indiana Youth Institute (IYI) professional development grant.
- **Existing funders:**  
Talk with a funder about support for you and a few of your peers.



## YOUR READING LIST

### **Sustainability: Making Strategic Decisions for Financial Viability"**

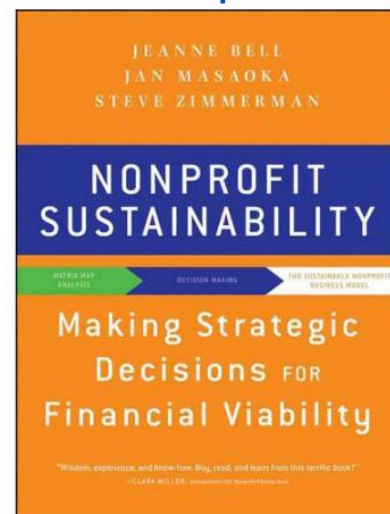
*by Jeanne Bell, Steve Zimmerman, Jan Masaoka  
(Jossey-Bass - 2010)*

This book has become a staple for many nonprofit leaders and consultants. The authors draw from many sources to create a visual and easy-to-understand framework for board and staff leaders to more fully grasp the relationship between mission and money.

A second book, "Sustainability Mindset: Using the Matrix Map to make Strategic Decisions," builds on the concepts. Watch for a feature article on this topic in the fall. Let me know what you are reading.

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### "Nonprofit



## SELECTED CHARITABLE ADVISORS NONPROFIT RESOURCES

[Nonprofit Job Board](#)

[Real estate to lease or for events/meetings](#)

[How to place a Job ad](#)

[2016 Charitable Advisors Nonprofit Salary Survey](#)

supported more nonprofits through leadership transitions and retirements than any other area firm. Nonprofits post 1,000 job openings each year on our nonprofit job board. We research and publish the local nonprofit salary survey and we keep thousands of nonprofit leaders informed each week through the Indianapolis Not-for-profit News e-mail newsletter.

**Contact me** if your organization is preparing for its next strategic planning cycle, envisioning a new focus on board development, or preparing for a planned or unexpected leadership transition.

*Bryan Orander, President - Charitable Advisors*



STAY CONNECTED

