Total Cuteness!
Want to play a game?
Learning Objectives
Tips and tricks on best practices for annual giving campaigns
How to manage your career as you navigate the changing organizational dynamics

Major Topics:
Life Stages of a Nonprofit Organization
Rosso Concentric Circles of Constituency
Manager / Technician Roles
Pitfalls
The Rules of The Game:

Disclosures

Generalities

Assumptions

Personal Opinions and Insights
The Facts of Life of the Annual Campaign

2 main objectives:
  • Strengthen donor relations
  • Sustain operational expenses

3 Major components:
  • Appeals
  • Special events
  • Stewardship
Who is in the Audience?

Explain Audience Participation
Fundraiser’s Fundamental Life Question:

Why do people give to a nonprofit organization?
The Facts of Life

Giving USA 2017 Reports $410.02 Billion Charitable Dollars

Individuals 70%
Foundations 16%
Bequests 9%
Corporations 5%
The Facts of Life:
Florida Nonprofit Alliance Report 2016

• 83,4900 active nonprofit organizations
• 534,116 people employed
• $26 Billion in annual wages
• $205.8 Billion in assets
Manager/ Technician Role
Self Evaluation Quiz

Dr. Kathleen Kelly
Effective Fund-raising Management
Manager/Technician Role
Managers make decisions.

Technicians implement the decisions made by others.
Managers are more likely to be:

- Male
- Have advanced degrees
- Longer than average time at current position
- Hold certifications
- Make more money
The Facts of Life: Compensation 2018

In 2018, there were 27,797 active members in US and Canada

- 75% female
- Average salaries earned by men ($92,544)
- Average salary earned by women ($74,519)
- Average salary of white fundraisers ($75,379)
- Average salary of fundraisers of color ($71,327)
- Average salary of CFRE certified fundraisers ($98,958)
The CFRE Facts of Life

CFRE Gender 2017
- Male: 26%
- Female: 74%

CFRE Gender 2007
- Male: 35%
- Female: 65%
The CFRE Facts of Life

CFRE Ethnicity 2017
- Caucasian: 91%
- African-American: 2%
- Hispanic: 2%
- Asian: 2%
- Multi-Race: 2%
- Other: 1%

CFRE Ethnicity 2007
- Caucasian: 92%
- African-American: 3%
- Hispanic: 3%
- Asian: 2%
- Multi-Race: 2%
- Other: 1%
Life Tip: Networking

1. Industry specific- AFP Local Chapter

2. Someplace where can you met a broad spectrum of people in your community: Chamber of Commerce, Rotary or Kiwanis

3. Some cause you are passionate about- your church, your children’s activities, HOA or sports
Life Tip: Mentorships

• Good for you as a mentor
• Good for you as a mentee
• Doesn’t have to be formal
• Doesn’t have to be long-term
Life Stages Theory

- Infancy
- Youth
- Teenager
- Maturity
- Decline
Life Stages Theory

Judith Sharken Simon

Susan Kenny Stevens, PH.D.
Major factors influencing life cycle:
• Age
• Size
• Growth Rate of the Industry
• External Factors
• Primary Leader Characteristics
• Board Governance
Infancy Life Stage: Can this dream be realized?

- 1 to 2 years
- Visionary Leader/ Founder
- Volunteer/ Unpaid staff
- One program focused
- One major funding source
- Short term needs
- Donors/ Board Member are Friends of the Founder
Youth Life Stage: How are we going to pull this off?

- 2-3 years
- Founder as Board Chair
- Small Board of Directors
- First staff employed
- Volunteer driven
- Marketing is word of mouth
- Lack of formal procedures
- Limited funds
- In-kind gifts
Teenager Life Stage: How are we going to pull this off?

- 2-5 years
- Founder as Board Chair
- Small Board of Directors but expanding
- Volunteer driven
- Marketing is word of mouth & social media
- Lack of formal procedures
- Limited funds
- In-kind gifts
Teenager Life Stage: How are we going to pull this off?

- Fiscal location
- Redefining program delivery
- Establishing Protocols

Characteristics of Management and Leadership Attribution

- Full time Paid Staff
- Comfortable with continual change
- Lack of job descriptions/ boundaries
- Understand the servant/leadership management model
Maturity Life Stage: How can we sustain the momentum?

- 7-30 years
- Board member are more diverse
- Executive Director as leader
- Decentralized chain of command
- Founding sources are established, new/diverse sources
- Professional Fundraiser may be hired
Maturity Life Stage: How can we sustain the momentum?

- Funding sources are established
- New funding sources are sought
- New programs are established
- Establishing endowments
- Operating reserve
- Capital Campaigns
- Long range planning
- Sophisticated marketing along planned promotions
Maturity Life Stage: How can we sustain the momentum?

• Funding sources are established
• New funding sources are sought
• New programs are established
• Establishing endowments
• Operating reserve
• Capital Campaigns
• Long range planning
• Sophisticated marketing along planned promotions
Maturity Life Stage: Obstacles

- Founder’s Syndrome
- Loss or gain of grant/ major funding
- Board stagnation
- Old vs. New Regime
- Red tape can cause division between management and staff
- Increased overhead with pressing financial needs
- Unreal expectations for paid fundraising staff
- Revolving Door
Maturity Life Stage: Tips for moving through maturity

- Formalize ED review process
- Formalize BOD roles
- Revise Fundraising Strategies
- Obtaining legal counsel
- Develop internal process
- Define branding
- Policy and Procedure oriented
Life Stages Theory

- Infancy
- Youth
- Teenager
- Maturity
- Decline
Decline Life Stage: What do we need to do to redesign?
2-5 years
Loss of morale
Heavy turnover of leadership - Staff and BOD
Top heavy administration
Long-standing programs become irrelevant
Long-standing funding dies up
Decline Life Stage: 5 signs

1. Attendance at BOD consistently drops below 50%
2. More than 30% of funding comes from 1 source
3. Fails to address issues uncovered during an audit
4. High staff turnover
5. No marketing strategy
Decline Life Stage: Best Practices

• Hold BOD Retreat
• Focus on implementing strategic planning
• Revise BOD Nominating Committee
• Develop a succession plan
• Expand funding sources
• Review organizational structure
• Explore collaborative partnerships
• Cutting expenditures
Hank Rosso
Concentric Circle
Constituency Model
Hank Rosso

Hank Rosso's

ACHIEVING EXCELLENCE in FUND RAISING

Henry A. Rosso & Associates
Eugene R. Tempel, Editor

Second Edition
Hank Rosso
Concentric Circle Constituency Model
Hank Rosso
Concentric Circle Constituency Model
Hank Rosso
Concentric Circle Constituency Model

A Different View
Pitfalls:
Founder’s Syndrome
Embedded ED
Dismal Swamp of Special Events
Sacred Cow Program
Pitfalls:
Rogue Board / Committee Members
Urban Dictionary defines “Rogue” as: To depart from convention with a sincere spirit of rebellion and disregard of social judgement. Often an act that pisses on all below from an elevated perch of self-indulgence.
Pitfalls:
Mission Creep
Pitfalls:
Revolving Door
Burnout
The Line That Shall Not Be Crossed

ETHICS!
Burning Questions?
Fundraising is the gentle art of teaching the joy of giving.

Hank Rosso