

A large, stylized graphic of a plant with several long, curved leaves and three oval-shaped leaves at the top, rendered in a lighter shade of green against the dark green background.

New York City Charter School Center

Development – foundation, fundamentals
and best practice – an overview

January 16, 2018



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INTRODUCTION

Agenda in Brief

- Housekeeping
- Introductions
- It all begins with the mission
- Fundraising requires a strong board that knows its role and lives up to its responsibilities
- Fundraising – critical elements
- Wrap up



*Use the
power of
story telling
to discuss
the mission
and connect
it to YOU.*

Your mission is your north star

- Tell us a story of a time when you knew that was fulfilling its mission.
- Or, tell us why this matters to you.
- Your story should capture the essence of the mission and why it matters.
- But even if you are telling us about why it matters to you, make the story about the mission, about accomplishments.



THE ROLE OF THE BOARD

WHY DO YOU HAVE A SEAT AT THE TABLE?

What is the job?

“Boards exist to assure that through the work of the charitable organization, someone’s dream of a better life might come true.”

M. Kent Stroman, The Intentional Board



The role of the 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 service
6. Ensure adequate financial resources
7. Protect assets and provide financial oversight
8. Build a competent board
9. Ensure legal and ethical integrity
10. Enhance the organizations public standing

Thanks to BoardSurce





How Boards move towards becoming extraordinary

They excel at providing three critical functions

- Oversight,
- Insight,
- Foresight.

Tamara Patton



THE ROLE OF THE BOARD GOVERNANCE

I love the Governance Function and so should you!

Great boards are built, they don't come about by accident. I like to think of it as akin to making a hire. Is this the right person for the right job at the right time?

- ✓ Assess what you have
- ✓ Assess what you need
- ✓ Do a board evaluation
- ✓ Consider diversity – what does that mean for your organization?
- ✓ Be totally transparent about expectations
- ✓ Make sure there is a give and get expectation
- ✓ Make sure you have terms and term limits
- ✓ Meet with each board member once a year

thank you

future goals

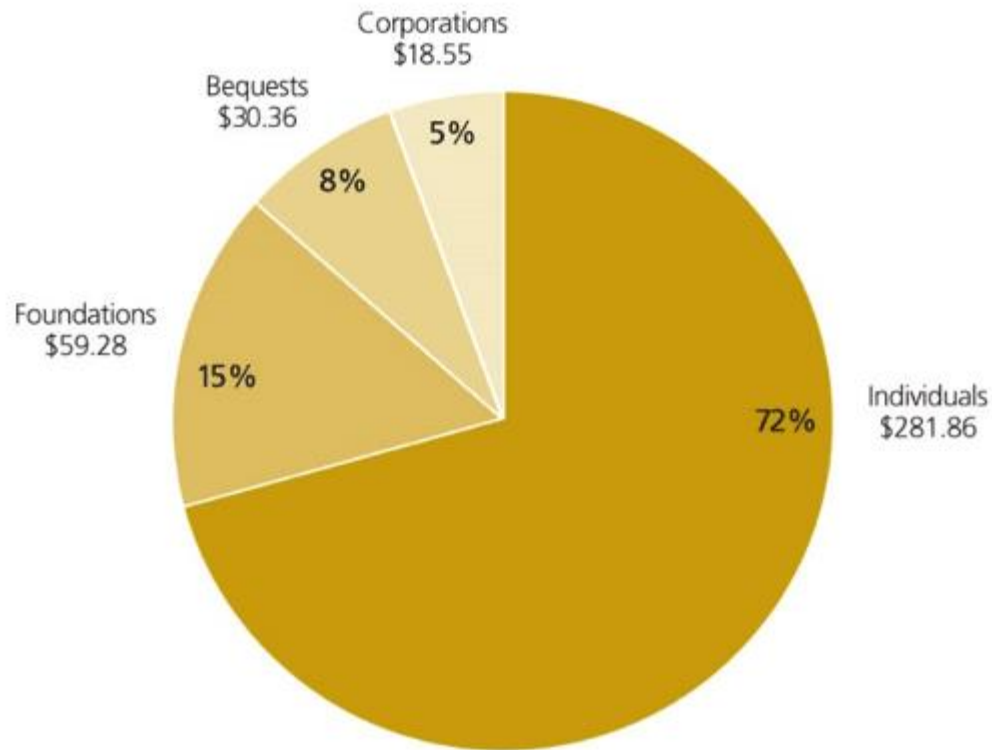
giving and getting



THE ROLE OF THE BOARD

FUNDRAISING

Fundraising – Who gives?



Source, Giving USA
Foundation, 2016



In 2016, INDIVIDUAL DONORS drove the rise in philanthropic giving
And for only the sixth time in 40 years, all nine major philanthropy subsectors realized giving increases

\$390.05 billion

Where did the generosity come from?*

Giving by Individuals
\$281.86 billion

↑ 3.9% **72%**

increased 3.9 percent (2.6 percent when inflation-adjusted) over 2015

Giving by Foundations
\$59.28 billion

↑ 3.5% **15%**

was 3.5 percent (2.2 percent when inflation-adjusted) over 2015

Giving by Bequest
\$30.36 billion

↓ 9.0% **8%**

declined 9.0 percent (10.1 percent when inflation-adjusted) over 2015

Giving by Corporations
\$18.55 billion

↑ 3.5% **5%**

increased 3.5 percent (2.3 percent when inflation-adjusted) over 2015

Contributions by source
(by percentage of the total)

The single largest contributor to the growth in total giving was an increase of \$10.53 billion in GIVING BY INDIVIDUALS—offsetting declines from bequest giving.

Where are all of the charitable dollars going?

(as a percentage of the total)

32% **Religion** \$122.94 billion

15% **Education** \$59.77 billion

12% **Human Services** \$46.80 billion

10% **To Foundations** \$40.56 billion

8% **Health** \$33.14 billion

8% **Public-Society Benefit** \$29.89 billion

5% **Arts, Culture, and Humanities** \$18.21 billion

6% **International Affairs** \$22.03 billion

3% **Environment/Animals** \$11.05 billion

2% **To Individuals** \$7.12 billion

Each charitable subsector grew in 2016 except for giving to individuals. Growth rates ranged from approximately 3–7 percent.

Giving USA Foundation™, The Giving Institute, and the Indiana University Lilly Family School of Philanthropy are pleased to continue their partnership in providing the most comprehensive, longest-running, and most rigorously researched resource on U.S. charitable giving, *Giving USA: The Annual Report on Philanthropy*. It is a privilege to report on Americans' generosity and related historical trends on U.S. charitable giving.

* All figures on this infographic are reported in current dollars unless otherwise noted.

Visit www.GivingUSA.org to learn more and to order your copy of *Giving USA 2017: The Annual Report on Philanthropy for the Year 2016*.



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IUPUI
LILLY FAMILY SCHOOL OF PHILANTHROPY

Ambassadorship and Networking – the bedrock of fundraising

Why is ambassadorship essential?

- You are offering people the opportunity to come closer
- All fundraising flows from this.

Best ways to talk about your schools

1.Features vs. Benefits (Impact)

Thanks to Andy Robinson and Andrea Kihlstedt

2.Stories, Facts, Impact – find them, learn them, use them, keep collecting them.



Ambassadorship and Networking

Networking/Ambassadorship sometimes leads to the same anxieties as asking does.

What will they ask of me in return

Am I a compelling enough ambassador

Will they be offended

What else?

Remember – the worst case scenario is that it doesn't work. Just let it go. Not everyone will be galvanized by your cause but with good practice you will learn quickly how to tell and I believe you will be pleasantly surprised at the number of people who will be interested. Even if it only results in a conversation, you have planted a seed.



It's ALL about
your IMPACT!

Convey your
VISION, MISSION, PURPOSE...
CLEARLY, CONCISELY, COMPELLINGLY...

YOU GET MORE
MONEY!!!



MORE, GREATER
IMPACT

MORE MONEY
EQUALS

Thanks to Tom Suddes, The
Impact Group

FUNDRAISING

THE STEPS

Planning

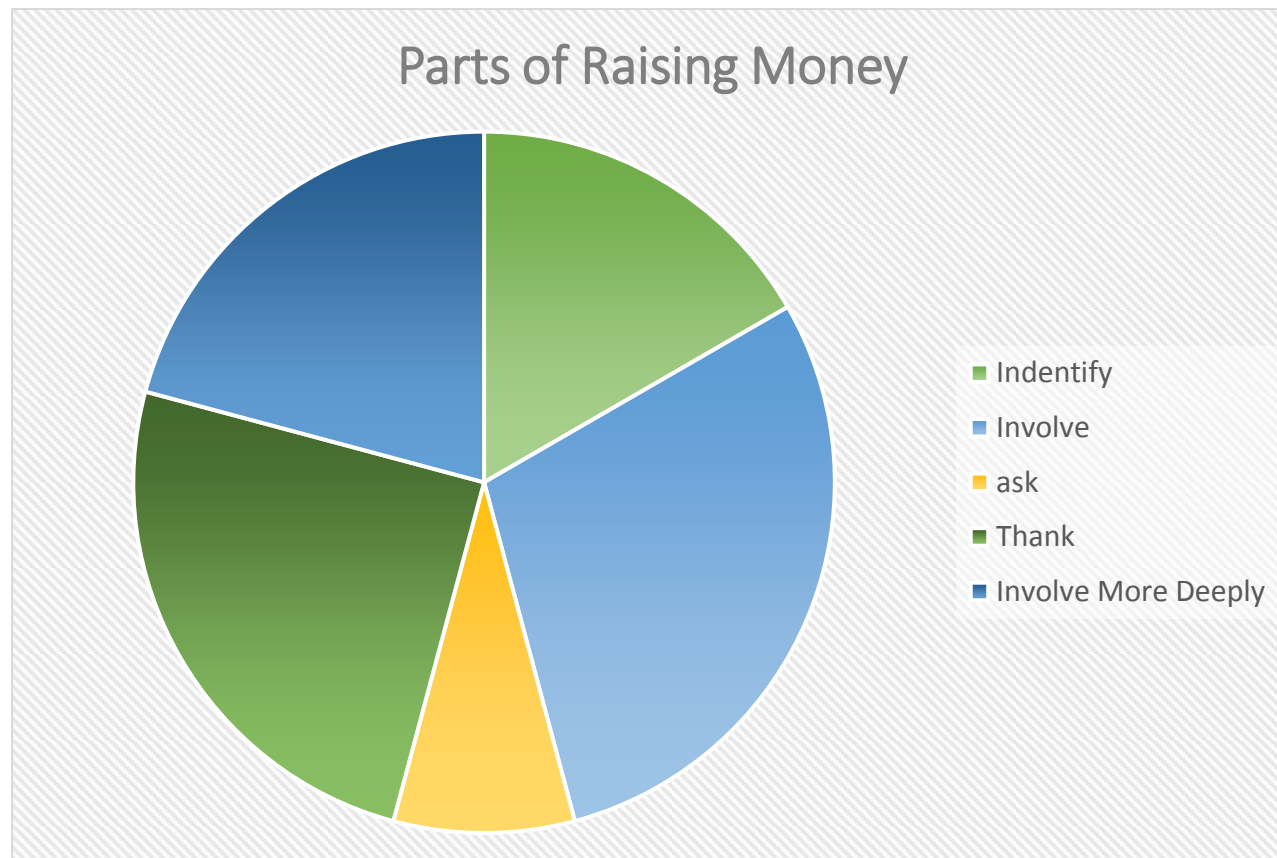
Smart Goals –always use these for development

No magical thinking!!!!

Specific	Measurable	Achievable	Relevant	Timed
S	M	A	R	T
What do you want to accomplish?	How will you know? What will the data be?	Is it within your power? You must look at your history, not just need.	Does it align with and advance your mission?	What is the timeline for the end goal and the steps along the way?



Raising money- Yes you can



With thanks and apologies for the
non-scientific rendering to Andrea
Kihlstedt and Andy Robinson

Parts of a major gift meeting

The prospect is identified and the research is done.
You know how they give, how much they give and you have a sense of why you might be a fit.

Getting the meeting

1. Be clear why you are calling or emailing– remember the ATM metaphor? Never, never lie. Are you coming to ask for a gift or advice?
2. Think carefully about where and when



How to ask for a major gift

First, prepare open-ended questions to ask your donor.

- We would love to learn a little about you and what issues are important to you, would you be willing to share that with us?
- What has guided your philanthropy?
- What do you know about xxx?
- We are so pleased that you agreed to meet with us, what questions can we answer?

Thanks to Gail Perry, Fired Up Fundraising.



How to ask for a major gift

How to phrase the ask

The gift range. What will happen if you ask for a gift between 5 and 10 thousand?

So, let's try this.

Thanks to Amy Eisenstein



In the meeting

- Get your donor to talk about themselves and their giving before the ask – this is critical
- Psych yourself up – Empathy, Energy and Enthusiasm (Jerry Panas)
- *Make it a conversation* but try not to talk more than 25% and never more than 50%
- Make it all about the impact – “Donors give to the magic of an idea” – Jerry Panas
- The more specific the better– your ask directly effects impact on your children.



Here is a big one that most people forget!



Be prepared for their answer! After all, what are the possibilities?

You need to know what comes next for each.
Think about it in advance.



Let's Practice.



Retention- Why do you care?

- **You have less than 2% chance of a gift from a brand new donor who doesn't know you.
(The cold call)**
- **You've got a 20-40% chance of a gift from a lapsed donor, and**
- **You have 60-70% chance of another gift or an upgraded gift from an active donor.**



Retention – It is tough! It is critical! And we are, as a sector doing a lousy job at it.

Donor retention is, at the very least, as important as donor acquisition and it is less expensive. Thanks to Bloomerang for this slide

AVERAGE

46%



FIRST-TIME

23%



REPEAT

60%



MONTHLY

90%

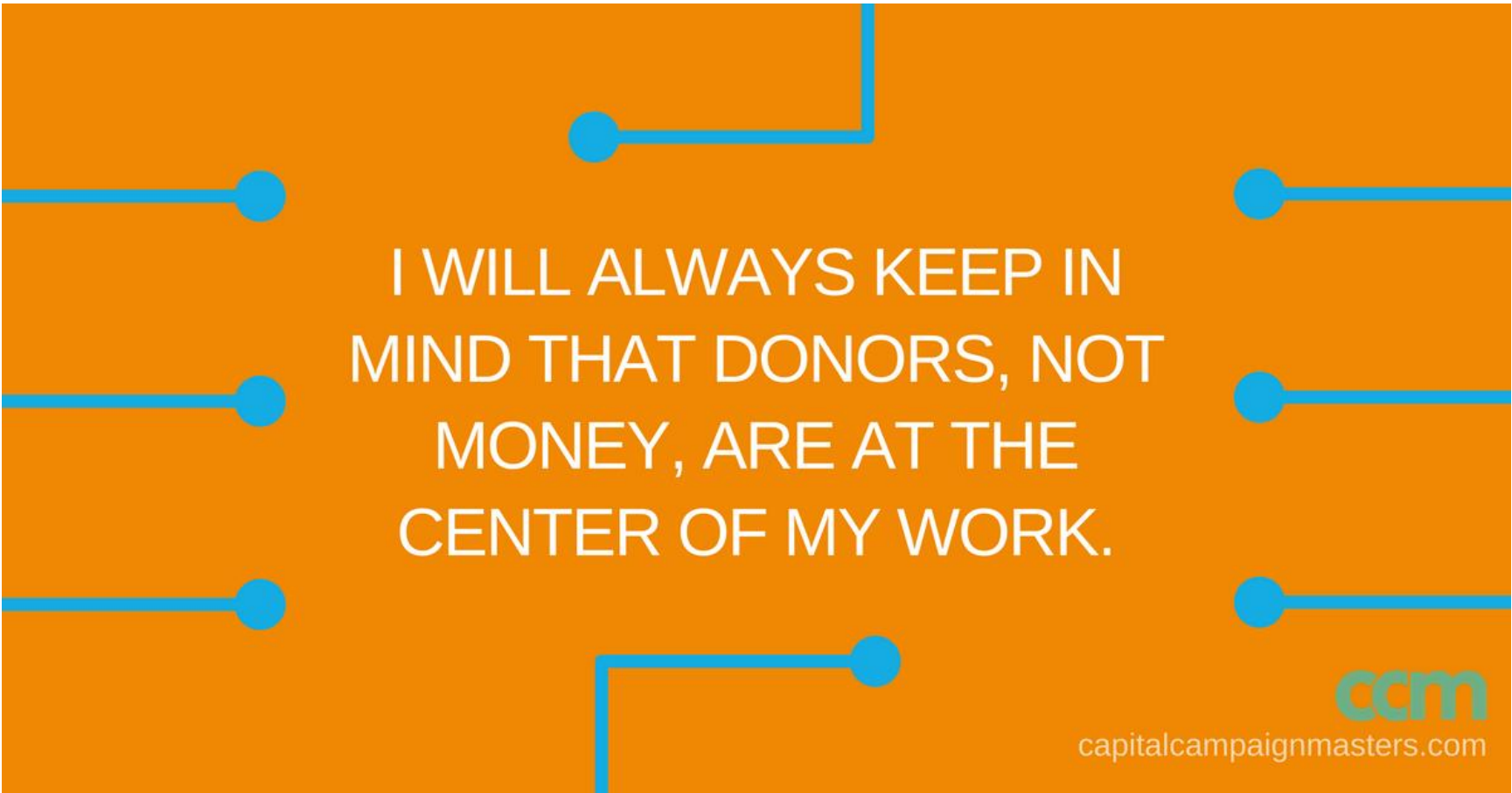




Thanks to Bloomerang for this slide

Retention-How do we do it?

It's all about Stewardship



I WILL ALWAYS KEEP IN
MIND THAT DONORS, NOT
MONEY, ARE AT THE
CENTER OF MY WORK.

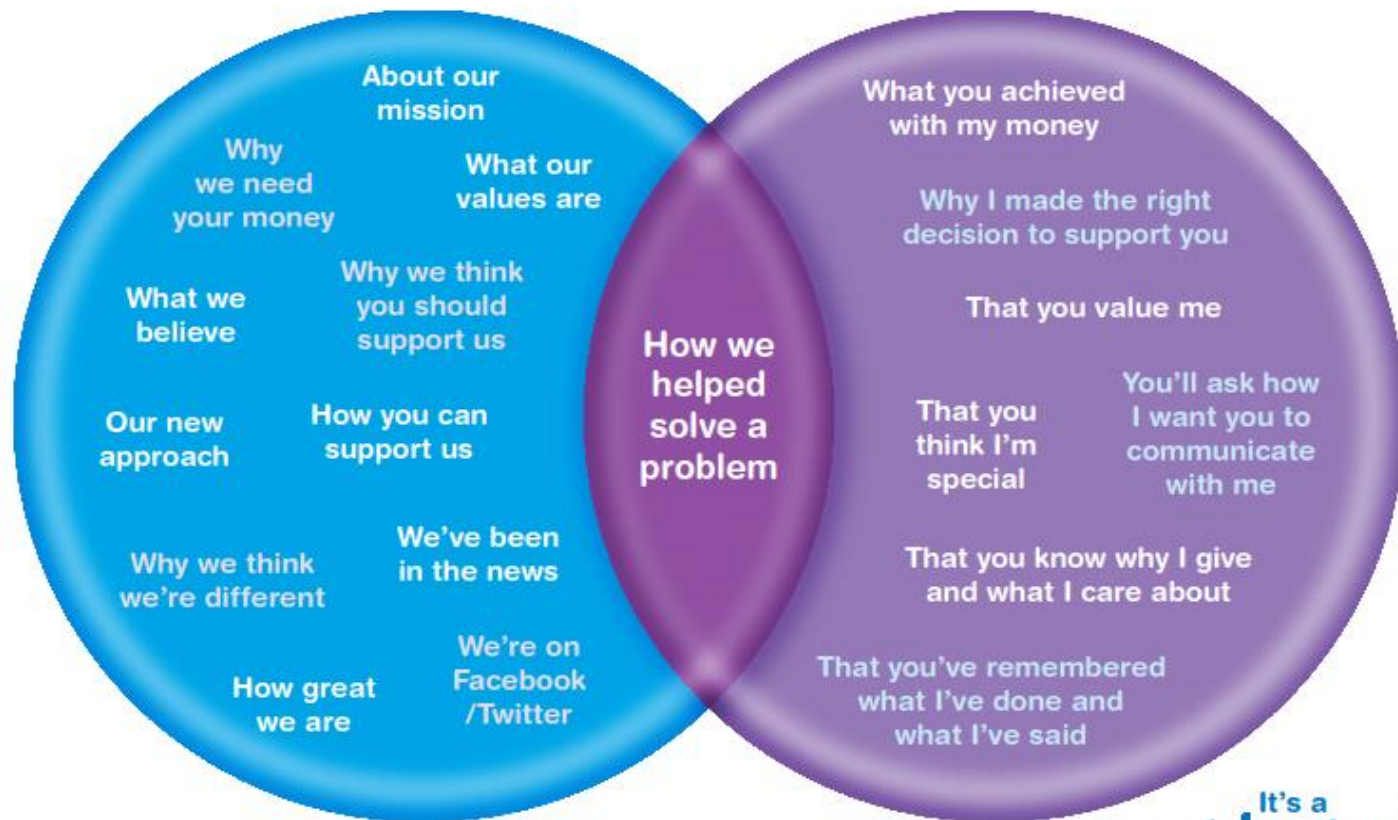
ccm

capitalcampaignmasters.com



Things that a charity
wants to tell a donor

Things that a donor wants
to hear from a charity



I am blessed to work in a very generous field, with many kind, smart, fun people dedicated to making the “3rd sector” stronger. Here are a few of my favorites for fundraising but there are many more. Some are quoted in this session, many have free resources and run webinars that are well worth the price of admission. For a few there are annual passes. I hope one or two are just right for you. Who do you follow?

Board Source	Boardsource.org
Network for Good,	networkforgood.com
Bloomerang,	Bloomerang.co
Tim Kachuriak,	nextafter.com
Pamela Grow,	pamelagrow.com
Gail Perry,	GailPerry.com
Andrea Kihlstedt ,	capitalcampaignmasters.com
Andy Robinson,	trainyourboard.com
Julia Campbell,	icsocialmarketing.com
Kivi Leroux Miller,	nonprofitmarketingguide.com

And again, I thank them for their ideas and generosity and apologize if I have misquoted or messed up the attribution.

Next Steps - Implementation

Next Week

Next Month

Next Quarter



Thank you!



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