



Go First...

Your guide to fundraising that involves your team, focuses your efforts and inspires donors.

By Dion McInnis with thanks to Ben Franklin

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Special thanks to:

Mom and dad, who always gave me the freedom to be me...long gone, but forever loved and missed

My sons, who are my heroes—Dion, Justin and Cameron

My grandchildren, who remind me that the best of our everyday efforts are for the future

Cheryl, who persistently and consistently believes in me and encourages me to grow

Charity, whose faith in me and Faith in God, helps keep me focused and grounded while looking to God

You, the people from all walks of life who always inspire me to create, to share, to make a difference

The Author

After spending more than a quarter century in leadership positions in higher education in the fields of alumni and community relations, development (fundraising), and communications, I bring to nonprofits experience, knowledge, wisdom, enthusiasm, optimism and motivation in both the strategic and tactical areas of visioning, strategizing, planning, and implementing transformative work.

As a coach-mentor-guide style of manager, I am adept at bringing along small or large groups to participate in the process and success. At the core of all my work are two basic beliefs:

Dollars are great...donors are better™

Achieving the vision...one friend at a time™

With those beliefs, I have raised millions of dollars, engaged thousands of members, empowered hundreds of volunteers, orchestrated scores of events...all of them, one friend at a time.

Fundraising comprises both art and science, but it is built in humanity. My style of coalescing an organization's passion for its cause; the belief of staff, leaders and volunteers; and, the power of authentic communications messaging is not for every organization, but it may be for yours.

I have been a photographer since the age of six, a writer since 12 and a poet since birth. It is with those senses and sensibilities that I have become an expert in listening to reveal solutions. My years in leadership have tapped into those abilities to help others develop achievable, transformative plans built on the power of philanthropy.

Listening is critical to the process, and that is my unique expertise. In fact, my first book is titled "Listen to Life: Wisdom in Life's Stories," in which I share through stories the wisdom needed in life. Everything we need to know, we can discover by listening to life. The same is true when developing the most compelling plans, case statements, proposals, strategies, tactics, morale enhancement and discovering how donors can best help your organization succeed while accomplishing their own goals, too.

An accomplished author, public speaker and photographer, I also provide a unique "kick off" program to help launch your fundraising initiative in moving, inspiring ways.

Table of contents

Overview—more opportunity than time to pursue it,

Chapter One: It's All Right Here: What to do, when to do it.

Chapter Two: Turning Sentence One Into Strategies and Tactics

Chapter Three: Turning Sentence Two Into Strategies and Tactics

Chapter Four: Turning Sentence Three Into Strategies and Tactics

Chapter Five: Turning Sentence Four Into Strategies and Tactics

Chapter Six: Keeping it All Together: Staff, Volunteers, Boards, Leadership: Meetings, retreats and workshops

Chapter Seven: Have fun! Don't forget to Ask.

Overview

In the mid-1990s, I read Ben Franklin's autobiography and in it I found a way to explain to others a simple and clear path for garnering the support of others. It obviously worked for Franklin in a lot of endeavors, and I figured it would work for people involved in similar initiatives as mine. I was a higher education administrator who created, managed and implemented programs for fundraising, alumni and community relations, and communications/public relations. Franklin's wisdom has served me ever since, and it can help you, too.

I have used the quoted paragraph in staff meetings, planning retreats, seminars and workshops for groups ranging from library science students to student organizations, from nonprofits to volunteer fundraisers, and everything in between. In this book, I will de-construct the four sentences that comprise his strategy and then re-construct it as a guide for strategies and tactics. In his wisdom, you will find a place for everyone in your organization. You will also see the importance of record keeping, donor acknowledgment, social media and much more.

This book is about focus, not shortcuts. There are no shortcuts in successful fundraising...it takes work. Likewise, there is no need to take circuitous or rambling routes when a more direct path is available.

Too often too much emphasis is placed on dissecting data, building pyramids, analyzing trends...while there is a place for such things, the real ticket to success is action with intention. **Go first...**

Chapter One: The Paragraph for Any Organization Seeking Funds

"My practice is to go first to those who know the cause and believe in it, and ask them to give as generously as possible. When they have done so, I go next to those who may be presumed to have a favourable opinion and to be disposed to listening, and secure their adherence. Lastly, I go to those who know little of the matter or have no predilection for it, and influence them by presentation of the names of those who have already given. Do not neglect those who you are sure will give nothing, for in some of them, you will be mistaken."

Benjamin Franklin

These four sentences present a guide that most organizations have neither the staff nor resources to implement fully. In fact, most do not have the time to thoroughly execute the first sentence. Don't feel overwhelmed. The message is that there is more opportunity than there is time or resource to utilize it when you use a focused, successful strategy. That is great news.

By using the four sentences as different, but related guides...you will be more successful in fundraising. By using the four sentences as complementary functions...you will be able to integrate the processes commonly known as prospecting, cultivation, solicitation and stewardship. By using the four sentences...you will have a perpetual system of activity that grows your success, and joy, in fundraising for you, your team and your donors.

Subsequent chapters will go into greater detail with specific examples and insights into how this works for different members of your team: leaders, volunteers, front line staff, etc. Check the audio links for stories that may help you retain the lessons and understand how it all fits together.

For now, let's review the paragraph and certain words. We'll review the highlighted words to show the power and potential in following Franklin's clear and focused wisdom.

"My practice is to go first to those who know the cause and believe in it, and ask them to give as generously as possible. When they have done so, I go next to those who may be presumed to have a favourable opinion and to be disposed to listening, and secure their adherence. Lastly, I go to those who know little of the matter or have no predilection for it, and influence them by

presentation of the names of those who have already given. Do not neglect those who you are sure will give nothing, for in some of them, you will be mistaken."

My

From the beginning, he takes ownership of the process. Already he is taking responsibility. These traits are important for everyone in the fundraising process, from the leaders through to volunteers.

Practice

Think of "practice" in a couple of ways. When you think of a "doctor's practice," you likely connote a business with good records, effective systems, stability, well organized, etc. Bingo. When you think of an "athlete's practice," you likely envision hard work, repetitions to gain excellence, persistence, development to improve the basics and a commitment to nuances that make the difference between good and great. Bingo.

Go first

Go is an action verb, it is not a verb of condition. Fundraising involves doing, not simply being. Just because your nonprofit exists is not sufficient reason for people to give their hard earned dollars to it. It doesn't matter whether your audience involves alumni or community members, former patients or clients, the process of fundraising involves action. Don't expect to raise necessary funds from behind your desk. Don't forget the word "first." Clearly, he already sets the stage that there are future steps involved. Getting the support of others requires many steps, and they should be organized.

Who know the cause

These simple four words could very well serve as the cornerstone for your plans. First, realize that Franklin says nothing about knowing your organization. He didn't say to go to those who know the company that you work for. The key here is your "cause." What is your organization's cause? Hint, it is NOT your mission statement, vision or case statement, though it should influence those three...and more. Everyone in your organization has a role to play in finding these people.

Believe

Just because someone is aware of your organization's cause doesn't mean they believe in it. Everyone in your organization has a role to play in helping to discover who believes in your organization's cause; likewise, you can, and should, incorporate processes that help you discover who believes in your cause using social media, existing contacts, publication plans and more.

Ask

Simple: ask. Courting and cultivating is fun, but asking gets the job done. Euphemisms

for asking only dilute your confidence and focus. Of course, the timing of the ask is affected by many things but don't forget to ask.

Give

Be clear. Ask them to give. You should ask them to give something specific that matches your organization's needs and the donor's goals/values/beliefs. These things can only be learned by engaging potential donors and listening to them—their thoughts, stories and ideas.

Generously as possible

Asking a millionaire for \$100 trivializes their ability to make a difference; asking an unemployed person for a million dollars ignores their realities. Asking someone to give as generously as possible requires some knowledge of their capacity to give (keep in mind that no data are certain or foolproof), as well as a development of the relationship that better connects the donor to your cause. Only through relationship—not mere data mining—will you know how much to ask for.

They have done so

Notice the mindset: “**When** they have done so...” The reality of fundraising is that you will be turned down more often than not. Fundraising success does not belong to the thin-skinned or the timid, nor does it require hardness or aggressive behavior. Move forward as the genuine you, matching the donor's desires with your organization's cause, and do so with a positive attitude. I strongly encourage anyone who breathes to read *The Aladdin Factor* by Jack Canfield and Mark Victor Hansen. It is a great book, and amidst its pages it provides great guidance on how to ask. The last section of this book is a two-page summary of those tips.

Go next

These two words command action and imply that there is already a specific series of steps to identified prospective donors. Do you have that clarity? Can you distinguish from the first group (those who know the cause and believe in it) and the following group?

Presumed to have a favourable opinion

Some people can be presumed to have a favorable opinion. Alumni from a university, for example, are presumed to have a favorable opinion. (NOTE: I believe too much credence is given to this notion. Alumni paid for services rendered. Why should administrators and university personnel assume that alumni want to give to their alma mater(s) above all else? That is naïve. Over the past decade-plus, we have seen a huge increase in alumni graduating with significant student loan debt. Is it right to “expect” that alumni are craving to give to their alma mater? No. “Presuming” is a kissing cousin to “assuming,” and you know what assuming does... Consider this group carefully, but honestly.

Disposed to listening

If someone is disposed to listening then you must...have something to say. Make it clear, positive, directed to the donor's interests and engaging. Then be quiet. Listen. Respond to questions. Be clear with answers.

Secure

To secure is to get a commitment. You may not secure a gift on each appointment (if you do, you are likely the richest development professional ever and have no need to read this book), but can secure something: their future consideration, time for another appointment, review of materials. No matter what you secure, be sure to follow up at the agreed upon intervals.

Adherence

They just don't write like they used to, do they? Adherence: the act of supporting a party, person or set of ideas. When you visit with a donor—remember the visit is about him or her, and not about YOU—your goal is to move them to action(s) of support. An action of support can be a gift, of course, but it can also be a commitment to a future step in the process. Try to never “leave things up in the air,” at the end of a meeting.

Know little of the matter

Notice how far along in the sequence this step resides. Consider your plans, action and budget within the sequence of priorities. For most organizations, there are more donors and prospective donors in the “know your cause and believe in it” pool than there are staff and/or volunteers to handle. However, events, social media, public relations, elevator conversations, etc. can help carry the message to those who “know little of the matter” if you plan and conduct said things with purpose, clarity and intention.

No predilection for it

Let's be clear about the word “predilection.” It is a preference or special liking for something, according to Oxford Dictionary. For example, a donor may be more inclined to support youth. If your organization serves to benefit the environment, that donor may not have a predilection to your organization's purpose, as well as not knowing or believing in its cause...yet. But, if your organization has environmental programs to directly benefit or affect youth...see? Don't try to make oblique, forced connections; they exist or they don't. Be cognizant of where you carry your message.

Influence

People may choose to support something with appropriate influence. I don't believe in strong-arming, nor do I much care for the process of “I'll support your cause if you support mine.” That is shallow and tends to not foster long relationships. There are others factors that can influence giving. Think of potential influences for your cause—purpose, urgency, sense of community, etc.—and use them when appropriate.

Presentation of names of those who have already given

It is not likely, nor productive, to always flaunt the names of everyone who has given to your organization; however, the selective use of names or groups of names can make a difference. I encourage you to consider the behaviors that you want donors to emulate. At the last university I served, we determined we wanted to specifically honor presidential-level giving, longevity in giving, lifetime giving total, and planned giving commitments. Not only did that make it easier to differentiate names, but it also gave us specific messages in all our fundraising efforts to help inspire and influence donors to certain behaviors. The presentation of names requires : excellent record keeping, permission of the donors, and appropriate ways to list the names (hint, not all ways are appropriate for all types of giving).

Do not neglect

While we cannot give equal attention to everyone who is on our radar screen, could be on it or someday might be on it, we also cannot neglect others. The world of philanthropy is full of stories of donors whose contributions came as complete surprises to their beneficiaries. That said, be careful of the time and other resources that go into casting a wide net. Here, too, other methods of communicating your message with clarity, optimism and positivity play a tremendous role in spreading the word and inspiring support.

You are sure will give nothing

Fundraising is a very human activity—emotional, complicated and sometimes mercurial. The minute you think you are sure of something...

You will be mistaken

I highlight this comment as a reminder for humility and a call for common sense. At some point, you have to admit that you will not get everyone to donate, and that's okay; you cannot cut and analyze the data until you find the "magic way" that assures success, and that's okay; and, you will have all the assurances in the world for a contribution, and it doesn't come through, and that's okay. Fundraising changes the world, but not completely. People are still people. Enjoy the ride.

Note: Everyone in fundraising knows that the majority of gifts and consistency of giving are predominated by individuals. Foundations and corporations provide important support, but you should consider individuals as your primary focus, and the others as complementary; however, foundations and corporations are run by whom? Represented by whom? People. Individuals. The processes discussed in subsequent chapters will improve your success in all areas because it focuses on the people and how you connect to them.