



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.

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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.

Chapter Two: Turning Sentence One Into Strategies and Tactics

"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."

For most organizations, this sentence can define 80% of resources, effort and time available, as well as the focus of plans (both fundraising and other related functions, and most everything else relates to good fundraising). The magic is finding out those who know the cause and believe in it, but first

What is your cause?

Hint: It is not your mission, your vision or the name of your organization, though the cause may be incorporated into the first two (usually by accident).

According to Oxford Dictionary, a cause is "**A principle, aim, or movement to which one is committed and which one is prepared to defend or advocate.**" Spend some time with staff (all of them, not just the "fundraisers," board leadership, key volunteers, etc.) to discern, articulate and activate this. It will become a core element of all meetings, plans, retreats, communications, solicitations, etc.

Shameless plug: The process to pinpoint your cause and to articulate it often requires a good facilitator. I am one! [Contact me.](#)


Once you have determined what your cause truly is, you can set about determining 1. Who knows the cause and 2. Whether they believe in it. This is followed by another two-step process: 1. Determine possible populations and 2. Listen.

Who Knows the Cause

Consider the populations of people who may know your cause. Start with the easiest to determine: look to those who have experienced your organization's services as client, alumnus, patient, volunteer, board member and so on. Look close to home.

I suggest you think carefully about looking far back into your files. I understand that those who became familiar with your organization decades ago are likely now wealthier and have more disposable income. But consider, is the organization of then the organization of now in terms of culture, sense of community, connectedness, camaraderie, personalization and other factors that would have made them fall in love with it? More than likely, things are different. It is important to honor their perceptions that are different from the current times and help bring them along to how things are now. Just because they enjoyed the effect of a personal, intimate university setting of

50 years ago doesn't mean they will love the hustle and bustle of a 30,000-student campus full of technology.

Don't forget past customers/clients or recent ones. This could be clients of a woman's service organization, like a shelter, or scholarship recipients at a university. Who are your past or recent clients/customers? {Brainstorm with me by clicking  for a chat}

If the groups above are the "pebble in the pond," look now at the ripples. What is the next closest audience or population? Community members? Related, but non-competing, organizations?

And the next ripple? Sponsors or donors to similar causes (don't think only in terms of organizations)?

And the next ripple? People highlighted in the media or other places who advocate for, or defend, the same cause as your organization's?

...and so on.

I hope it is clear already that you already have more than you can say grace over, and that is just with people who know the cause! Now you have to determine whether they believe in. That process involves everyone related to your organization.

Another shameless plug. Need some help walking your team through this process in order to stay focused on the goals of getting your best list possible? [Contact me.](#)

...and Believes in It

Research

Just because someone knows the cause doesn't mean they believe in it. The process described above will help you and your team find those who know the cause, and, to some extent, determine whether someone believes, truly believes, in the cause or whether they merely acknowledge it is important among many other causes in the world. Further research will be necessary. The better you vet the list, the more efficient you will be.


Searching the media for names of people who support your cause can help, not unlike the beauty of finding the needle in the haystack. Setting pre-determined searches in Google, for example, can feed you the names of people who know your cause and believe in it. You will likely get a lot of references that are of no value (most of them, actually), but that is the reality of searching with keywords. In addition to the internet and social media, there are electronic databases that can be purchased and reference books in libraries.

As much as the electronic world can help, there is no better guide than “ears to the ground.” Everyone in your organization can be part of this process. Everyone.

Everyone can keep their eyes and ears open in their daily lives outside of work for people who believe in the cause; everyone can be attentive to media (television, social, etc.) for human interest or other stories that reveal people who know the cause and believe in it (local media is particularly helpful); everyone can look within their own circles of friends and networks that are work related or personal. Everyone has a role, but they must be empowered and encouraged to participate in the information gathering.

Listen

Listening is the most important step, and the most challenging. Listen to everyone involved with your team, and regularly encourage them to provide names and ideas of who to contact. Provide them with phrases or comments that, when said by a potential donor, indicate interest and belief in the cause. Guide them on how to listen and what to listen for, and then everyone becomes part of the information gathering process that leads to direct conversations with donors. What happens then? More listening.

Conversations provide insight. When you have your cause firmly in mind, and clearly articulated, it will spur conversations with others. In these conversations, people will share and you will learn what truly matters to others; you will learn what causes they know and which they believe in. Encouraging “deeply spoken stories” will open the door to opportunities and insights {listen  about “deeply spoken stories”}. You must listen TO what is said, and listen FOR what is meant.

Ask and Listen More

Ask questions. Then listen to the answers. Don't bullishly lead people to a position where you can “pop the question” of asking for support. Ask. Listen. The vast majority of gifts that I garnered for the institutions that I served came when the other person asked me, “How can I help?” Inspiring people to provide support of some type is far better than coercing them to give. Through questions, answers and listening, you will learn the other person's motives, values and purpose, and when those overlap with your cause, vision and mission...ask.

The information gathering will help you determine what “as generously as possible” means for each person. But determining the right amount is not an exact science. To be able to be clear with your request of support, you must also be clear about what the real needs are. I suggest a sequence that provides perspective:

1. Your organization's solutions to address the cause.
2. The cost of those solutions, be they programs, scholarships, etc.
3. How those costs relate to the overall budget.

Explaining things in this sequence helps others understand the solutions, their costs, and how those solutions relate to your organization's overall budget. This context and perspective is critical.

Look at the connotations of “practice” referenced in the first chapter. Now consider all the processes described in this chapter. Make them a practice; practice them. You will be more successful.

Here are some strategies and tactics that you may choose to implement to help discover who knows and believes in the cause of your organization so that you may ask them to give as generously as possible. Of course, you will have many other ideas that you developed.

Chapter Three: Turning Sentence Two into Strategies and Tactics

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.

Franklin exhibits a positive attitude here. He assumes success—"when they have done so"—and persistence. You must have both, even though it is a fact that you will be turned down more often than accepted when asking for funds or other support. Attitude matters, and a "no" today is not a "no" forever.

I have been told several times by donors, "You are the first person from the university to ever visit me twice," suggesting that others made one appearance but never returned. Good fundraising is an ongoing process. Again, a "no" today is not a "no" forever.

This group of potential donors is even larger than the group described in the first sentence. There are four significant elements to pay attention to:


1. Go next
2. Those who may be presumed to have a favorable opinion
3. Be disposed to listening
4. Secure their adherence

Keep in mind the connotations of "practice." It is something you do again and again in a sequence to develop skill, muscle memory, strength, etc. The sequence is important to develop in the right order. Franklin reminds us to "go next," meaning the first group has been identified and worked, and now it is time to go to the next group. There is a bit of psychology involved that also fits into the notion of practice.

It is important to start with success. Positive experiences improve confidence that empower more challenging experiences. The same is true for fundraising. For example, whenever I used volunteers to help with solicitations, particularly in phone campaigns for gifts or memberships, I would have them assigned to previous donors or members. The chances of success are higher, and this builds confidence. In Franklin's sequence, after having done well with those who know the cause and believe in it, time is now spent going to those who should have a favorable opinion. By this time, you have had success, engaged in conversations, addressed donor questions...you are ready for the next step, the next challenge.

Who are those who should have a favorable opinion? I will use a university example that you can likely tweak to your own organization.


Alumni:

All alumni *could* be presumed to have a favorable opinion, but that is naïve. Consider alumni who are still paying off student loans due to the cost of education, including tuition, fees, housing, books, etc. Consider alumni who see their degree as having been paid for already—payment for services rendered. They feel no need or compulsion to provide additional funds {listen to this story about a meeting }. Consider alumni who graduated from a program that the university has since dropped. Some of those groups have either a negative opinion or no opinion. They can be reached through processes in the other sentences of Franklin that we will review in subsequent chapters.

Which alumni are more likely to have a favorable opinion then? Those who received scholarships should have a good opinion of giving to scholarship drives because they experienced it. Those whose careers have truly been transformed by a particular, somewhat unique major could be because they experienced the benefits of the education. Those who were involved in the university life in some way—as a volunteer, leader, etc.—because they experienced it. Look to those with experiences beyond the normal “go to class, go to work, go home” and you will find those more likely to have a favorable opinion.

Do your record-keeping processes allow for these types of data? Are you enlisting the collective memories of employees, volunteers, etc. to help identify those who were engaged and involved?


Employees:

Employees can be a good audience. Don't assume that they already know the big picture of your organizational vision, mission and cause; likely, they don't. Likewise, don't assume all employees should feel compelled to give. Pardon me while I get on my soapbox for a minute {a few less-than-humble opinions } about morale.

I have served at four universities. In each, the general opinion among faculty and staff was that alumni *should* give, but for them it was strictly an option, and generally, staff gave at a higher percentage of participation than faculty members did. I won't get on that soap box now, but that reality has implications to communications, fundraising, organizational leadership, organizational vision, and the culture developed *throughout* the organization.

Retirees:

Retirees are a prime audience for those who should have a favorable opinion, with the caveat about the morale at the organization while they were there. When an organization has a fundraising perspective, it has a broad and long-term view. Involved students are not the same as happy students, and involved students tend to stay that way after graduation; appreciated employees tend to be appreciative retirees, and they stay that way; respected clients tend to be connected clients, and they stay that way. Every breath, every action, every plan should have the long term in mind, while addressing the immediate and near-term needs of the organization.

Retirees should be communicated to, engaged and handled in special ways to keep them informed and involved. They should not be contacted only when money is needed. I recall addressing retirees at University of New Mexico {  we shared the dream of a new building with retired faculty members}.

Graduating students:

Most universities conduct satisfaction surveys, like most businesses do. The last university I served was proud to state that 90+% of graduating seniors would recommend the university to their friends. That is a great number. The unasked question was why. If it was convenience, then the students are likely not very motivated to donate; if it was because the university was a place that transformed their life, they would be more likely to donate. Whether it is a student who just graduated, or a client that just finished services, or participants just completing one of your programs, it is good to find out the reasons for their satisfaction or dissatisfaction. Surveys help, but conversations are better. Listen.

Be disposed to listening...

If you find a group disposed to listening then you need to be....talking. Be clear, positive, focused and conversational. Leave plenty of time for questions, and answer all questions (even if that means saying, "I don't know the answer but I will find out for you.") Tell stories as examples; ask the prospective donor for his or her story. Nothing connects as well as stories. Make connections where possible, but don't be oblique or artificial.

And don't use an elevator speech!

My issue with elevator speeches is that they come across as practiced or appear to be affectations, or both. Learn your organization, have your own stories of experiences that support the cause, mission and vision of the organization. Be prepared to share those quickly, getting clues from the person with whom you are speaking. Be fully

attentive and aware, and then tap into your stories and knowledge comfortably. Be genuine, don't be rehearsed or formulaic. Exhale the messages and stories as part of who you are.

Secure their adherence

Refer to the first chapter again. Each interaction, conversation or correspondence provides the opportunity to garner the support of others. In order to "secure their adherence," you must ask them for it. Be clear and specific. What is the "adherence" that you desire? Funds? Time? The chance to meet again? Consideration of a proposal?

I recall a panel presentation of people who hire public speakers sharing their views of how to obtain speaking gigs. One panelist related the story of when he told the caller, "You are making a call because you need to sell; I don't need to buy. Remember that." We cannot look at fundraising situations as satisfying our need to raise money; that will happen when we do it right. Show how we can connect the donor to a cause he believes in—our organization's—and the gifts will come.

Chapter Four: Turning Sentence Three Into Strategies and Tactics

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.

Again, Franklin uses the verb "to go." We must take our messages and conversations to the donors and prospective donors. This sentence can guide your efforts in media relations, public relations, donor stewardship and social media.

Notice how the emphasis is on the names of those who have already given. While the solution could include ordinary plaques placed on the walls of your organization, that would miss 99% of the potential. If there must be plaques, make sure they display names with the honor they deserve, and the piece distinguishes itself from the typical plaques that soon find their way into garbage heaps. Remember, the place where you honor and recognize donors should be recognizable and honorable.

The simplest, most effective, ways to get your message and the names of others to those who "have no predilection for it" is through your communications processes. Consider the following as good starters. Keep in mind that your intention is to share with others the names of those who support your organization, and do so in ways that also convey your culture, personality and cause.

Photo cutlines

Media outlets, social media and your organization's publications thrive on visuals. Photograph cutlines that include the names of the people involved provide content that the media wants while also sharing the names of supporters to the public. To make this effective, the images should not include more than two or three people. Consider how you describe them. Which sounds better, "Jane and Bob Smith are pictured at the XYZ event," or "Alliance members, Jane and Bob Smith, admire children's art by area youth at the recent XYZ event?" The latter reminds readers that the two are members, and that the organization is involved with local children artists. The latter has a much greater effect than the former.

Social media



My personal aversion to the "social media solves all" mentality aside, it provides ways to share with the world that others support your cause and organization. The key is consistency, not only in frequency but also in message. Every image, message, tweet, etc. provides another chance to share the values, personality and character of your organization. Make the opportunities count. Stay focused.

Donor recognition

Donor recognition efforts should do more than simply make the names of donors and supporters visible. Use the process strategically. Consider the behaviors that you are trying to have others emulate. Determine the desired behaviors and build your recognition program around those. Perhaps these examples will spur some ideas for you:

- Plaques: Spend the money to create a distinctive plaque to display the names of your donors and place it in a highly visible location. There are many great options, including plaques that hold frames where paper is used to display the names. These can be updated and kept current, which is critical for good donor recognition and they can be beautifully designed. Explore the options at various designers who specialize in this service, but don't fall for the traditional wall of scores of plaques. Show more imagination than that.
- Posters: At my last university, we created elegant framed posters. There were two that together listed all the current donors in the various recognition levels that we maintained. The posters were displayed on easels at every event managed by my office. And at every event, donors would review them, some even noticing who displayed but logically should be. Elegantly designed, and very cost effective, the posters provided year-round recognition for donors and hundreds of viewings of "those who have already given."

Consider reverse recognition, too. Instead of just recognizing donors at your place of business, consider using donor recognition items that others see at the donors' locations. Some examples follow.

- Paintings: A couple of times in my career, I commissioned paintings or drawings that would honor a donor's generosity at their home or place of business. The art pieces were personalized {  the story of how Ruth received a painting}, and were displayed with pride. I am confident that the donors' pride in the art resulted in their proudly telling stories about how the university treated its donors, therefore placing the university in front of others that we would not have had a chance to otherwise.
- Photographs: Almost everyone loves photographs, particularly high-quality images that are meaningful and not simply good images. When the images are delivered as framed pieces, donors are more likely to provide them a visible venue. Their guests will see the image and learn about your organization as well as develop an understanding of how you treat those who support you. {We  made the Blue Bell ice cream folks happy}
- Books: Books provide a great opportunity to convey in images and words the story of a special event, program or initiative. A special page or two should be

dedicated to the donors and sponsors. At my last university, my office worked with NASA/JSC on a big community event that was part of the anniversary of the first lunar landing. The event was held at the university. We produced a book as part of our donor acknowledgement and provided copies to the donors and sponsors. The books appeared on their coffee tables, reception areas and more, helping to promote the university, its commitment to the community, and its appreciation for donors. Blurb and Lulu are two great print on-demand publishers for short-run book projects.

Testimonials and stories

You have probably noticed the increase in donor stories that appear in publications and web sites. They serve an important purpose. Be careful to not make your donors' stories sound like everyone else's though. Testimonials provide a more succinct approach to conveying a donor's support and/or belief in your cause. Feel free to guide your supporters in the key elements of a good testimonial; if it sounds cliché, it will not stand out among the many other testimonials. Place testimonials in proposals, publications, web sites and social media; they will be read by many, carrying the name of the supporters to hundreds or thousands who may not have known of your cause previously.

Chapter Five: Turning Sentence Four Into Strategies and Tactics

Do not neglect those who you are sure will give nothing, for in some of them, you will be mistaken

The magic of philanthropy cannot be fully understood with giving pyramids, data dissections and such. While organizations should not invest a lot of time or other resources in pursuit of everyone in the phone book, it pays to have a plan and commitment to maintain a presence in as many places as possible. We've already talked about media, social media, publications and web presence. These outlets play important roles for being in front of many audiences. The more difficult challenge is what to convey.

People like to support causes they believe in, and they prefer to connect to organizations that reflect their own values, e.g., efficiency in operation, empowerment of others, etc. At the end of the day, people connect to people.

The stories, images and postings that you select should strategically tell the story of people...those who benefit from your organization's tackling of its cause, and those who implement its programs. People connect to people...remember that in all that you do.

For all the training, certifications, professional development and research in the areas of fundraising and philanthropy, it is not an exact science. Two plus two may not always equal four. There are times in which "you will be mistaken." People who you are sure will contribute, won't; people who you would never imagine supporting your cause and organization, will. And that's okay.

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

Now that you have completed the five chapters, and have, hopefully, utilized the information for conceptualizing strategies and tactics, it is time to make the commitment to keep your entire team together in the process. Maintaining a cohesive message and a concerted effort requires diligence, focus and dedication, but it is worth it.

Review the chapters and note how everyone on the team can help identify those who know the cause and believe in it, those who could be presumed to have a favorable opinion and those who likely have no predilection for the cause. Utilize staff meetings, board meetings, planning retreats and development workshops to remind

others of how they can play a role in gathering information, telling stories and serving as ambassadors to the organization. Empower the team to learn, listen and share.

Everyone on your team can be part of the organization's success in living out the advice of Ben Franklin, but it requires tenacity, persistence and the empowerment of others. You, your team, your organization and your donors will all be the better for it.

[Contact](#) me for innovative, personalized, customized team-building programs for your organization. Definitely not the "same ol' same ol'."

Chapter Seven: Have fun!

Helping change the world by garnering funds for organizations that address important causes can be one of the most rewarding things you do. Or that your team members do. Amidst all the work, processes, events, programs, and so on, remember your work is valuable. Have fun. Enjoy and share the joy. Share stories, laughter and tears, as well as successes, “failures” and conundrums.

I encourage you to read *The Aladdin Factor* by Mark Victor Hansen and Jack Canfield. The book reveals how to ask others with the confidence and belief that people want to be each other's genie to help them achieve their dreams. Following is a summary of how the authors suggest people ask for things. The tips are handy, but I strongly recommend that you read the book.

[Help change the world through your efforts. You can influence change.](#)

ASK!

(Gathered from "The Aladdin Factor" by Jack Canfield and Mark Victor Hansen)

ASK AS IF YOU EXPECT TO GET IT

- Ask with a positive expectation
- See it the way you want it to be
- Ask with conviction
- Assume you can

ASK SOMEONE WHO CAN GIVE IT TO YOU

- Realize that some people aren't capable of delivering
- Ask someone whose business it is to know
- Ask people who are qualified and motivated to help
- Ask the experts
- Reconsider who is an expert

BE CLEAR AND SPECIFIC

- Be specific in your requests
- Be careful what you ask for
- Ask for what you want, not for what you don't want
- It's possible to be too specific

ASK FROM YOUR HEART

- Ask with passion, unbridled for your purpose, project, goal
- Ask with urgency and passion
- Ask with eye contact
- Ask in a kind voice
- Ask politely
- Ask with respect and admiration

ASK WITH HUMOR AND CREATIVITY

GIVE IN ORDER TO GET

- Give something to get something
- You have to give to get
- Give compliments or praise
- Explain what's in it for them
- Tell your partner how it benefits

ASK REPEATEDLY

Just say “next” when they say no
Look forward to the no’s
Ask the same people again and again
Just one more time

HOW TO DEAL WITH RESISTANCE

Don’t lose your cool
What needs to happen for me to....
Don’t create resistance
Ask with authority and be prepared for a no
A no may be a blessing in disguise
Be gracious in accepting a no
Don’t burn your bridges