

# **International Conference for College and University Presidents March 24-27, 2014, Silver Spring, Maryland, USA**

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Participants: Dr. Lilya Wagner, Moderator

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# Fundraising Realities of 2014

- Fundraising has NO easy steps.
- It's a thoughtful, careful process based on principles.
- There can be project fundraising, capital campaigns, or sustainability/annual fund campaigns.
- It can't be relegated to the back burner and be expected to succeed.
- Fundraiser must focus, be “in the loop,” have respect.
- The President is the Chief Fundraiser, assuming appropriate roles.
- Fundraising has spread globally for various reasons—no longer the domain of North America or Western nations.

# CEOs Rate Fundraisers

- [\*Underdeveloped: A National Study of Challenges Facing Nonprofit Fundraising\*](#) (U.S. perspective)
- One aspect of the study that drew attention was the somewhat lukewarm assessment by nonprofit CEOs of their development directors
- 33% were dissatisfied or lukewarm about the performance of their development directors
- 24% said their development directors have no experience or are novices at “current and prospective donor research”.

# Fundraisers Bite Back

- According to a recent survey, only 22% of respondents would “nominate your CEO for The BEST CEO Award” (50% said No, and 29% ticked “are you guys nuts”).
- “Rate your CEO’s understanding of and commitment to effective fundraising. He or she is ...”
  - A superstar — 16%
  - Gets the basics, but not a leader in this area — 38%
  - Pretty hands-off — 23%
  - More of a hindrance than a help — 23%
- Almost half (49%) would replace their CEO if they had the chance!

# Transparency: *Mirrors are replaced with magnifying glasses*

- Continual trend for two decades.
- International trend, use of the word transparency.
- Need to know donor expectations—for the U.S., see the Wise Giving Alliance and other watchdog organizations for guidelines on what donors want/expect.
- Efficiency and effectiveness more important than ever.
- Proof of affecting the head and the heart—the numbers and the human element.

# Accountability Issues

- Accountability works both ways internally, and also externally.
- Presidents should be receiving reports in detail they request.
- Presidents should ensure fundraisers are kept “in the loop.”
- Presidents should be foremost in expressing the case and fundraising reports to board, donors and publics, in appropriate ways. Boards vary greatly across the globe, but reporting to them doesn't.

# Outcomes, outcomes, outcomes!

- More demands for outcomes than ever before.
- Need, “warm fuzzies,” heartrending stories, emergencies not as relevant as outcomes.
- Address both the head and the heart.
- Prove expected outcomes have been achieved.

# Mutual Benefits of Giving

- It really IS more blessed to give than to receive.
- Secular research underscores the benefits of being generous.
- In general, generous people live longer, are healthier, and are happier.
- (Research information available from PSI).



# Major Donors: where the money is— we think!

- Giving Pledge has spurred generosity across the globe.
- Giving Pledge has called attention to major donors internationally.
- Giving across the borders is prevalent, not just western countries to third world nations, but in all directions.
- Much of the money goes to education.
- Generational transfer of wealth has changed.
- The wealthy may give to causes which fulfill what they want to accomplish, but just as often they will begin their own organizations/causes.
- A more business-like approach to giving.

Major Donors sometimes grow from average or small donors—all are important to a successful fundraising program—respect and involve the rich young ruler and the widow's mite.



# Donor Retention

- In spite of some upturn in giving, charities continue to lose more donors than they gain.
- Growth in giving in the U.S. is not keeping pace with growth in GDP.
- Nonprofits lose donors because of economic turbulence, ineffective relationship building, poor stewardship.

# Customer Service

- It is estimated that up to 60% of U.S. donors cycle out of giving to an organization because of how it treats them.
- Responsiveness, including timeliness and appropriateness, is critical.
- How welcoming is your website? How readable? Boring and static or dynamic and relevant? Universally the website is critical for performance and awareness.
- The personal touch is still most important.

# Recognition

- Ensure immediate thank you and receipt.
- The larger the donation, the more involved the president.
- Today's major donors tend to ask, "Are you interested in me or just my money?"
- The larger the donation, the more personalized the recognition.

# Diversity, Culture and Identity-Based Donors

- No longer can fundraising be based on one-size-fits-all.
- Culturally-proficient fundraisers are critical for successful fundraising.
- The global effect on fundraising cannot be ignored—philanthropy and fundraising practices are intertwined on an international basis.
- Promise of richness in every way, although can be challenging.

# Global Aspects of Fundraising

- See attached article.

# Integrated Fundraising Strategies

- Strategies for fundraising vary by country and culture—face to face still most significant and where the president should be involved.
- Social media are here to stay—their use, tools, audiences change continually.
- Mail is not dead; it's best combined with social media.
- In some countries, phonathons have been resurrected—but carefully, selectively, cautiously.
- Websites are gateway for donors.
- Fundraisers must be aware of laws governing use of strategies/tools in their countries.



# Planning is Essential!

- If you don't plan, how do you know where you're going—how will you know when you've arrived?
- Donors want/demand plans.
- Plans lead to outcomes.
- Plans are critical for accountability.
- Types of plans—different approaches.

# President's Role in Fundraising

- See two articles, attached handouts.

# Revisiting the Six “Rights” and the President’s Role



Fundraising is . . .

- The right person asking
- The right prospect
- For the right cause
- In the right way
- For the right amount
- At the right time

• From The Fund Raising School



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