Breaking Bad Habits
Letting Go of What Just Doesn’t Work in (Individual) Fundraising and Embracing What Does

Jeanne Bell, CompassPoint
@JeanneBellCP @cp_change
**habit**: a settled or regular pattern of behavior, especially one that is hard to give up
CIRCLE CONVERSATION
Please introduce yourself and share:
“Have you ever broken a bad habit? What was it? How did you break it?”

@JeanneBellCP @cp_change
The rhythm for our time together.

Data *(what doesn’t work)*

Reflect & Connect

Data *(what does)*

Reflect & Connect

Set Intentions

@JeanneBellCP @cp_change
Let’s start with what *doesn’t* work.

@JeanneBellCP @cp_change
habit: a settled or regular pattern of behavior, especially one that is hard to give up

@JeanneBellCP @cp_change
UNDER DEVELOPED
A National Study of Challenges Facing Nonprofit Fundraising
Development Directors

Anticipate Leaving the Organization within 2 Years

57% 51% 49% 38%

Under $1 million Between $1-5 million Between $5-10 million Over $10 million

Development Directors

By Organizational Budget Size

UNDER DEVELOPED A National Study of Challenges Facing Nonprofit Fundraising
Executives Very Satisfied with Development Director Performance

<table>
<thead>
<tr>
<th>Budget Size</th>
<th>Satisfaction</th>
</tr>
</thead>
<tbody>
<tr>
<td>Under $1 million</td>
<td>27%</td>
</tr>
<tr>
<td>Between $1-5 million</td>
<td>36%</td>
</tr>
<tr>
<td>Between $5-10 million</td>
<td>37%</td>
</tr>
<tr>
<td>Over $10 million</td>
<td>41%</td>
</tr>
</tbody>
</table>

By Organizational Budget Size
Executive Director Fundraising Capacity:
High-performing Organizations and Rest of Sample Comparative Responses

- Loves Asking for Gifts: 44% (High Performing Organizations), 28% (Rest of Sample)
- Skilled at Securing Gifts: 89% (High Performing Organizations), 72% (Rest of Sample)
- Previous Development Experience: 38% (High Performing Organizations), 24% (Rest of Sample)

Reported by Executive Directors
Board Members Sufficiently Engaged
in Asking Individual Donors for Contributions

By Organizational Budget Size,
as reported by Executive Directors

- Under $1 million: 18% (Sufficient)
- Between $1 - 5 million: 22% (Sufficient)
- Between $5 - 10 million: 17% (Sufficient)
- Over $10 million: 35% (Sufficient, 7% Very Sufficient)
Strength of Partnership in Fund Development Work:
Executive Director and Development Director
Comparative Responses

Executive Directors
Development Directors

<table>
<thead>
<tr>
<th>Level</th>
<th>Executive Directors</th>
<th>Development Directors</th>
</tr>
</thead>
<tbody>
<tr>
<td>None</td>
<td>1%</td>
<td>3%</td>
</tr>
<tr>
<td>Weak</td>
<td>13%</td>
<td>18%</td>
</tr>
<tr>
<td>Fair</td>
<td>34%</td>
<td>38%</td>
</tr>
<tr>
<td>Strong</td>
<td>53%</td>
<td>41%</td>
</tr>
</tbody>
</table>
Realistic Financial Goals and Development Director Influence:
High Performing Organizations and Rest of Sample Comparative Responses

- **Organization has Realistic Financial Goals in Place**
  - High Performing Organizations: 90%
  - Rest of Sample: 75%

- **Development Director Has a Lot of Influence on Financial Goals**
  - High Performing Organizations: 64%
  - Rest of Sample: 37%

Reported by Development Directors

Underdeveloped: A National Study of Challenges Facing Nonprofit Fundraising
Development Director Assessment of Culture of Philanthropy

- Development directors strongly agree
- Has a Culture of Philanthropy: 36% (High Performing Organizations), 12% (Rest of Sample)
- Practices good donor stewardship: 59% (High Performing Organizations), 32% (Rest of Sample)
- Understands fund development: 40% (High Performing Organizations), 18% (Rest of Sample)
Effectiveness of Overall Fundraising Activities:
Executive Director and Development Director Comparative Responses

- Executive Directors
  - Not at all effective: 4%
  - Somewhat effective: 14%
  - Effective: 39%
  - Very effective: 56%

- Development Directors
  - Not at all effective: 3%
  - Somewhat effective: 14%
  - Effective: 43%
  - Very effective: 15%

UNDER DEVELOPED
A National Study of Challenges Facing Nonprofit Fundraising
The Vicious Cycle

- Inability to develop and sustain success conditions
- Lack of success conditions
- Short tenures/volatility in development function
- Premature development director departure
PAIR CONVERSATION

“Did you see any of your personal and/or organizational habits in these data? What habit(s) need your attention?”

@JeanneBellCP @cp_change
CIRCLE CONVERSATION
Each pair share the themes from their conversation with the full circle. All discuss.
And now, to what *does* work!

@JeanneBellCP @cp_change
practice: a repetitive act consciously practiced for explicit benefit and improved over time

@JeanneBellCP @cp_change
Fundraising Bright Spots

In-depth interviews with staff, board, volunteers, and donors of 16 social justice organizations

Together they raised over $14 million in 2014-15 from individual donors

“Regular” groups who are not caught in the “vicious cycle”

Read it here: http://www.haasjr.org/sites/default/files/resources/Haas_BrightSpots_F2.pdf

@JeanneBellCP @cp_change
I encourage other organizations and leaders to feel a confidence and a comfort in focusing on what you do and how you do it and to trust that that will connect you with other likeminded people.”

@JeanneBellCP @cp_change
Fundraising Bright Spots Mindsets

The decision to raise money from individuals—as well as the approaches used to do so—are steeped in existing organizational values.

Being genuine about who you are and what you stand for as an organization is core to fundraising success.

Fundraising is a form of organizing and power-building, not merely a strategy for financing the organization’s work.

@JeanneBellCP @cp_change
It’s not about someone being professional or educated in a certain way. It’s really about shedding light on the fact that we already have these skills in communities of color. It’s about making visible and lifting up the resourcefulness that we’ve always had.”

@JeanneBellCP @cp_change
Fundraising is not the purview of a select group of professionals, but a process, if well-supported, that anyone can engage in.

Development directors are organizational leaders focused on skill building, culture change, and systems development to support others in fundraising.

The conversation about fundraising goals and progress belongs everywhere. It’s not contained in a single department or confined to a single team.

@JeanneBellCP @cp_change
If NCLR hired a small army of people who were very organized and less passionate, it wouldn’t come through in the same way. They hire people from our community, who reflect our community, who are really passionate about what they are doing. It’s palpable in your interactions with them.”

@JeanneBellCP @cp_change
Fundraising Bright Spots Mindsets

“Donor” is only one aspect of the many relationships that committed supporters forge with an organization.

Authentic relationships with donors are part of a larger organizational culture that values relational rather transactional interactions with everyone.

High trust and accountability among staff and board members allow leaders to weather fundraising’s inevitable ups and downs together.
We don’t have a singular development plan. We have a system.”

@JeanneBellCP @cp_change
Fundraising Bright Spots Mindsets

More important than having a perfect system is working whatever system you have with a stance of rigor and continuous improvement.

Development and communications are inextricably linked; compelling communications are a powerful way to acquire, engage, and retain donors.

The use of data is not just about having a donor database. It’s also about surveying your donors; getting feedback from your fundraisers on what messages are resonating; and studying the performance of every fundraising campaign and event.

@JeanneBellCP @cp_change
PAIR CONVERSATION
“Did you see any of your personal and/or organizational practices in these data? What practice(s) need your attention?”
CIRCLE CONVERSATION
Each pair share the themes from their conversation with the full circle. All discuss.
PERSONAL REFLECTION
Take 5 minutes to yourself to set a specific, compelling intention to deepen your fundraising practice. Include an immediate next action.
CIRCLE SHARE
Each person take 2 minutes to: share your intention; share why the time is now; and share your immediate next action.

@JeanneBellCP @cp_change
“What we realized is that we had never really talked about our fundraising philosophy. So we talked until 3 AM and what emerged is that one of our core tenets with our clients is building long-term, trusting, non-agenda-driven, unconditional relationships. And, through those relationships we are trying to help our clients identify and achieve their own goals. At the end of that conversation, we realized that is the exact same way we want to work with our donors. Once we had that light bulb go on, it changed everything.”

-Rob Gitin, At the Crossroads

@JeanneBellCP @cp_change