Leveraging Social Work Knowledge & Skills for Fundraising Effectiveness
I love fundraising!

Goals for Today:
• Change attitudes about fundraising
• Explain process of individual fundraising
• Explain why social workers can make great fundraisers
• Explain how you can support your organization’s fundraising
• Highlight job & career opportunities in fundraising
Barry Rosenberg

- MSW, 1975, SUNY-Albany
- 37 years executive leadership & fundraising
- Jewish Federation of St. Louis
  - $25 Million revenues
  - Annual gifts from $10 - $500,000
  - Endowment, corporate sponsorships, government grants
  - Personally solicit $3 million / year
- Professor of Practice, Brown School
  - Chair, MSW Management Specialization
  - Lead faculty – Leadership at Brown program
  - Lead & conduct Executive Education
Social Workers & Fundraising… Ick!

- Dirty, unsavory, coercive
- Discomfort with money
- Stereotypes of wealthy
- Attitudes hurt fundraising results
Fundraising Builds Community
Fundraising – a force for good

• Builds community, social capital, leadership
• Educates public to needs
• Reinforces democratic & communitarian ideals
• Altruism is associated with happiness & health
• Empowers

• Our organizations depend on it!
80% of all philanthropy is given by individuals

- Annual gifts & friends
- Unrestricted major gifts
- Restricted program grants
- Bequests / Planned Gifts
- Challenge / Matching grants
- Capital gifts
- Gifts in kind

Move individual from initial to once-in-a-lifetime gift
80 / 20 Rule

- 80% of revenue comes from 20% of donors.
Social Workers Make Great Fundraisers

Social Work competencies support fundraising

• Person-in-environment perspective
• Understand people’s needs, goals, self-concept
• Start where the donor is
• Experts at building relationships of trust
• Commitment to confidentiality
• Understand client needs & program outcomes
• People give because you meet needs; not because you have needs.
• Our passion is inspiring
Fundraising Cycle

Prospect Identification

Prospect Research

Strategy Development

Cultivation

Solicitation

Negotiation/ Close

Ongoing Stewardship

Ongoing Research/ Update

- Performed by Prospect Research Function
  (Best Prospects Consulting Expertise)
- Performed by Major Gifts Function
Mr. & Mrs. C

- Retired, early 70’s
- Second generation of family business
- Jewishly identified, politically liberal, social justice causes
- Major donors - flat
- Not active at Federation

- Prognosis: continued giving with gradual reduction
Mr. & Mrs. C - Cultivation & Stewardship

- Socialized at mutual friend’s home
- Took over relationship
- Insisted on annual appointment
- Gradual increase of 33%
- Arranged private tour to Israel
- Introduced ask for planned gift / endowment
- Interested, but not now
- No “wow” yet
- Identified new project related to business
$250,000 Cash Gift
Cultivation & Stewardship

- Education, advocacy roles
- Build relationship & trust
- Active listening
- Patience & gentle movement
- Meet their needs
- Broker: match organization & donor needs
- Keep the door open
- Leave them smiling
- Long-term process
“The social work side of fund raising is where all the skill is. Listening between the words, reading between the lines, recognizing patterns in conversation, sensing the moment to ask a provocative question, asking permission to broaden the range of a relationship — these are the social work skills that are essential to fund raising success.”

- Paul Jolly, President of JumpStart Growth
Other Competencies

• Understand tax law, deductibility, payment options
• Integrity, honesty, discretion
• AFP Code of Ethics
• CFRE Competencies
  – Current & Prospective Donor Research
  – Securing the Gift
  – Relationship Building
  – Volunteer Involvement
  – Management
  – Accountability
A Culture of Fundraising

“Most people in the organization (across positions) act as ambassadors and engage in relationship building. Everyone promotes philanthropy and can articulate a case for giving. Fund development is viewed and valued as a mission-aligned program of the organization. Organizational systems are established to support donors. The executive director is committed and personally involved in fundraising.”

– Kay Sprinkel Grace
How You Can Help

• Give
• Identify potential donors
• Tell the story in social settings
• Treat donors, volunteers & board members with respect & appreciation.
• Say thank you.
• Handle gift administration well
• Collect impact data, stories & testimonials
• Cheer on the fundraising team
• Align policies, procedures, compensation to support fundraising
Job & Career Opportunities

• Crisis recruiting & retaining qualified fundraisers
• High turnover & short tenure
• Jobs for people willing & able to fundraise
• Excellent pathway to management positions
• Access to top leaders & board members
• Want to be a CEO? – Learn to fundraise!
Questions & Discussion
Contact Information

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Philanthropy 2030
Tax Deductibility

• Taxpayer in 25% bracket
  – Income $1000
  – Taxed $250

• Makes $500 tax deductible contribution
  – Taxes reduced 25% of contribution = $125
  – Taxed $125
  – Save $125

• Final cost of $500 contribution = $375
Resources

- Certified Fund Raising Executive (CFRE) http://www.cfre.org/
Getting the Appointment

• Establish agreement to talk & rapport
• Opening to get their interest
• Listen & respond
• Ask for the appointment
• Negotiate
  – Confirm the appointment, or
  – Can you take a minute to tell me why?
  – Can I send you information?
  – Can I put you on our mailing list?
• Leave them happy
Overcoming Objections

- Pre-empt – anticipate & address
- Respond
  - Pause & think – take objection seriously
  - Gather information – tell me more
  - Check your understanding – do I hear you correctly?
  - Trial close – so if we fixed that, you’d contribute?
  - Respond to objection
  - Check if satisfied
  - Ask for gift
- Feel, Felt, Found
- When the prospect says yes, STOP TALKING!