

BREAK DOWN SILOS!

How to build a **more functional organization** so you **raise more money**

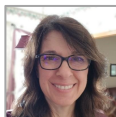


INTRODUCTION

Housekeeping

Recording & slides will be sent to all attendees & registrants

Questions will be answered at the end of the presentation

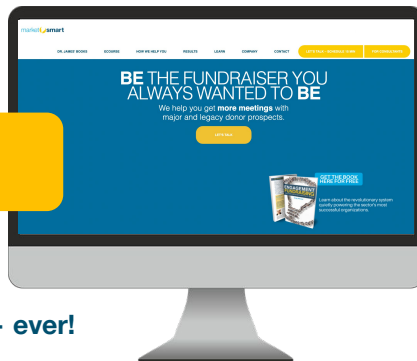


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LET'S TALK

Informative & educational

No sales pressure — ever!



BREAK DOWN SILOS!

INTRODUCTION



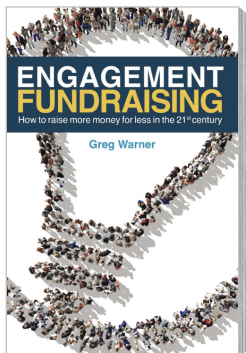
Greg Warner

CEO & Founder

market  smart

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FUNDRAISING
REPORT CARD 

<https://fundraisingreportcard.com/>



dafwidget 

<https://dafwidget.com/>



DONOR STORY:
EPIC FUNDRAISING ECOURSE
with Dr. Russell James

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INTRODUCTION



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Your outsourced
'DONE-FOR-YOU'

major gift marketing team

We deploy automated marketing systems that help fundraisers **land more meetings** with major donor prospects when they're **ready** to talk about donating **major gifts** of assets and legacy gifts



**BE THE FUNDRAISER YOU
ALWAYS WANTED TO BE**

INTRODUCTION

NO RISK OFFER



Get 10:1 ROI*
guaranteed or your money back

*For qualified organizations only. Terms & conditions apply.

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How to build a more functional organization so you raise more money

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and legacy gifts



**BE THE FUNDRAISER YOU
ALWAYS WANTED TO BE**

INTRODUCTION



Based on research conducted by

DR. RUSSELL JAMES

World-class educator & researcher

Published in 75 peer reviewed scientific journals

Quoted in major media



Hall of Fame



NATIONAL ASSOCIATION of Charitable Gift Planners

BREAK DOWN SILOS!

INTRODUCTION



Based on research conducted by

DR. RUSSELL JAMES

Ph.D. in consumer economics

Former Director of Planned Giving


Former President of a college

Completed 2 major capital campaigns

Built several debt-free buildings

Tripled enrollment

INTRODUCTION



"This book is a must for any business or management team. TRACTION provides a practical and simple system for running your business."
—DAN SULLIVAN
PRESIDENT AND TRAINING, THE STRATEGIST

NEW YORK TIMES BEST-SELLER

The FIVE


Overview ▾ 29 Reviews ▾ 12 Salaries ▾ 3 Interviews ▾ Benefits ▾ 20 Photos

MarketSmart (Maryland) Reviews

4.6 ★★★★★ ▾

96% Recommend to a Friend

95% Approve of CEO

 Greg Warner
19 Ratings

5.0 ★★★★★ ▾

Former Employee, more than 5 years

"Great place to learn and grow"

Oct 24, 2021 - Senior Software Engineer in Ellicott City, MD

✓ Recommends ✓ Approves of CEO

Pros

I joined MarketSmart as an intern and from the time I joined the company, I had something to learn every single day, which is a big plus. The engineering team is a small, tight group which allows you

Cons

MarketSmart faces challenges that any growing company would face like growing workforce, diverse customer needs, tech debt etc. but the company is trying to anticipate and overcome those difficulties

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5,603 Reviews Compare

 Kelly Mitchell Group
4.2 ★ Compare




BREAK DOWN SILOS!



FUNDRAISING

BREAK DOWN SILOS!

How to build a more functional organization so you raise more money



TODAY'S AGENDA

Understand the problem

Why we must fix the problem

How to fix the problem

IS YOUR ORGANIZATION FUNCTIONAL?



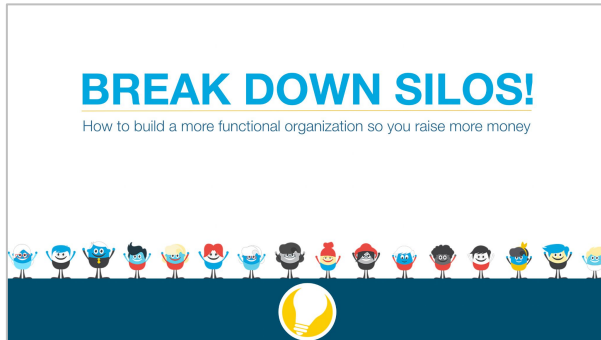
ASSESSMENT RESULTS

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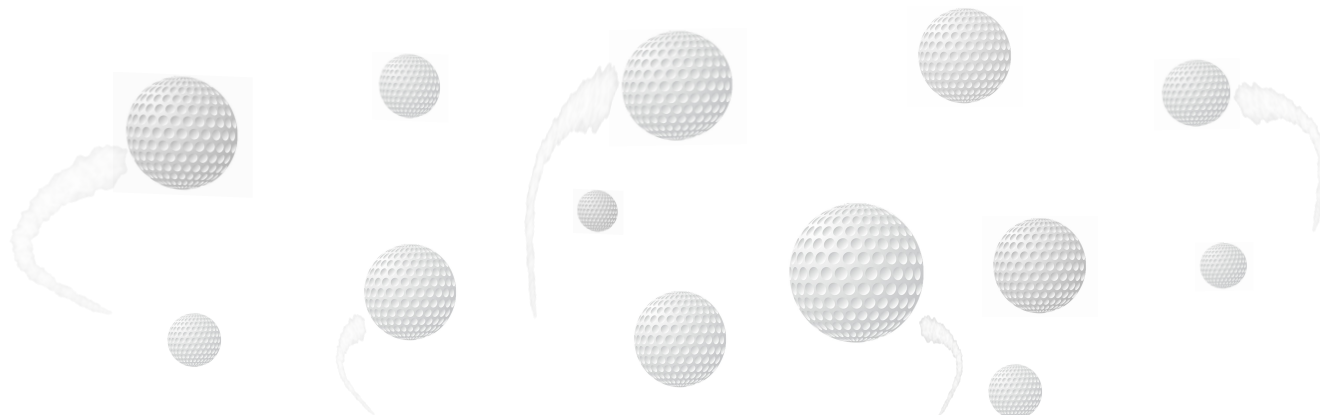
UNDERSTANDING THE PROBLEM



Why do silos exist in organizations?



UNDERSTANDING THE PROBLEM



POOR LEADERSHIP

BUREAUCRACY

Inhibits a staff member's ability to autonomously do meaningful work

<https://www.microsoft.com/en-us/research/uploads/prod/2022/04/Microsoft-New-Future-Of-Work-Report-2022.pdf>

DISENGAGEMENT

Reduced energy and interest

**LESS INTEREST IN
COLLABORATING
= SILOS!**

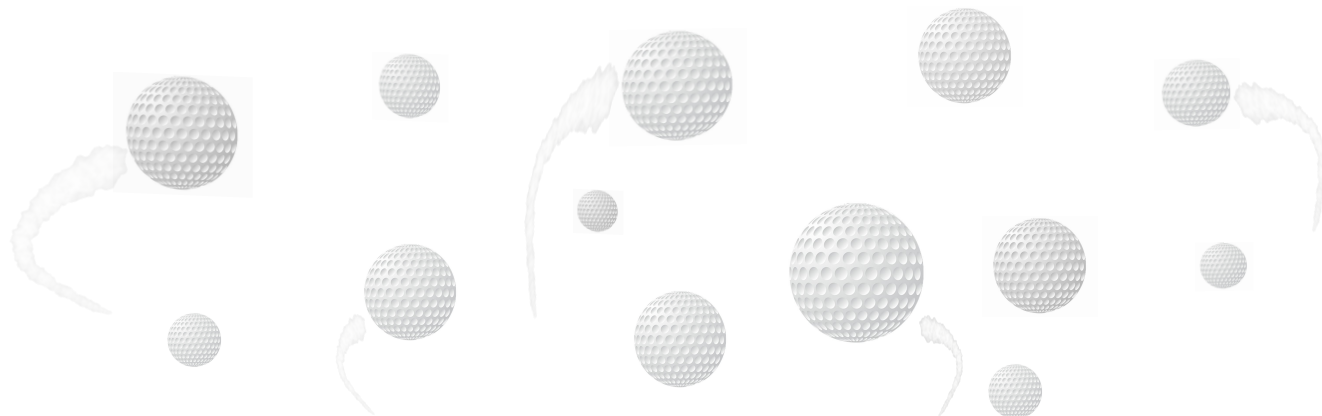


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UNDERSTANDING THE PROBLEM



DISSIMILAR TEAMS

Low dollar fundraisers, high dollar fundraisers, events staff, communications staff, etc.
+ Volunteers, board members & more...

COMPETING OBJECTIVES

Inhibits a staff member's ability to autonomously do meaningful work

<https://www.microsoft.com/en-us/research/uploads/prod/2022/04/Microsoft-New-Future-Of-Work-Report-2022.pdf>

MISUNDERSTANDINGS

Reduced energy and interest

DISTRUST = SILOS!



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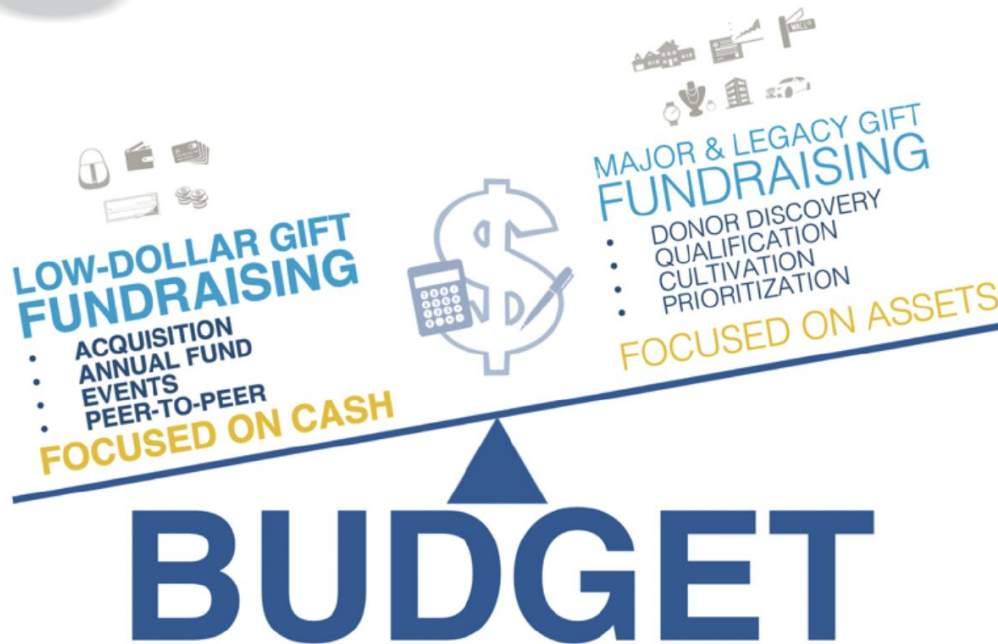


UNDERSTANDING THE PROBLEM



BREAK DOWN SILOS!

MONEY \$



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MONEY \$



LOW-DOLLAR VS. HIGH DOLLAR DONORS

December 2021 Data

www.fundraisingreportcard.com/benchmarks

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Daily analysis of \$104 billion in charitable giving
using data from 10,000+ organizations

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MONEY \$

LOW-DOLLAR VS. HIGH DOLLAR DONORS

Under \$100 donors

Under \$100

\$100 to \$250

\$250 to \$1,000

\$1,000 to \$5,000

\$5,000 and up

Average Donation Amount [?]

\$25.57

Donor Retention Rate

16.35%

Lifetime Value [?]

\$44.75

Over \$5,000 donors

Under \$100

\$100 to \$250

\$250 to \$1,000

\$1,000 to \$5,000

\$5,000 and up

Average Donation Amount [?]

\$40,827.65

Donor Retention Rate

35.73%

Lifetime Value [?]

\$75,468.11

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MONEY \$



80/20 rule is now **76/.74**



Donors giving over \$5,000

= .74% of an org's donor base
but make up **76.38% (3/4)**
of all donation revenue \$

10:1 — 100:1 ROI

Donors giving under \$100

= 77.16% of an org's donor base
but make up only **4.96% (1/20)**
of all donation revenue \$

2:1 — 5:1 ROI

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MONEY \$

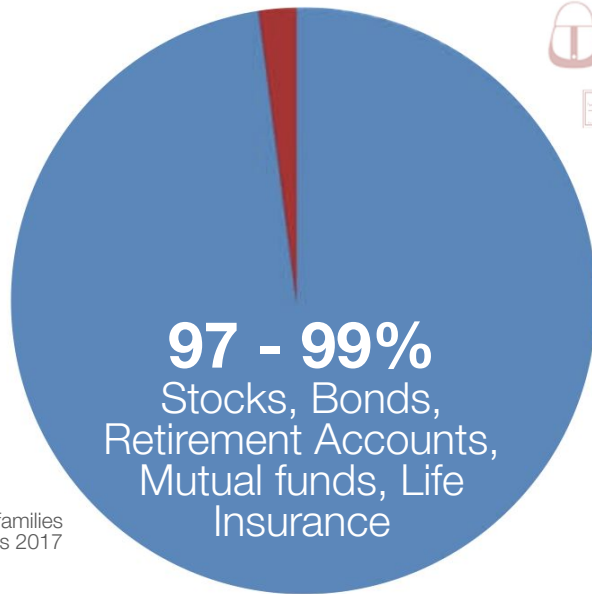
Where is wealth stored?

MONEY \$

Where is wealth stored?

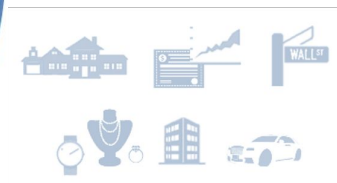
1 - 3%

Cash, Checking or Money Market
Deposit Accounts and Similar



97 - 99%

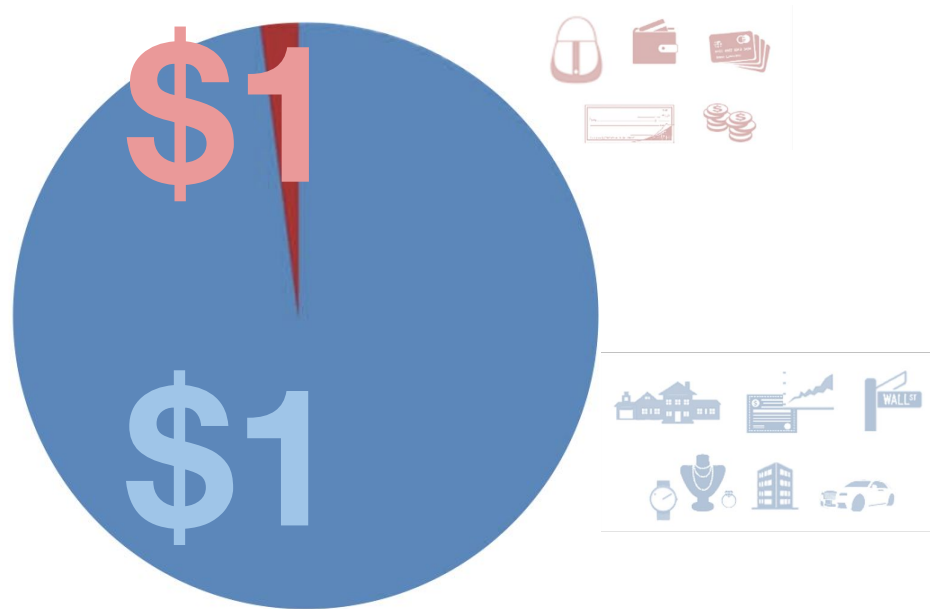
Stocks, Bonds,
Retirement Accounts,
Mutual funds, Life
Insurance



Financial assets held by families
U.S. Census 2017

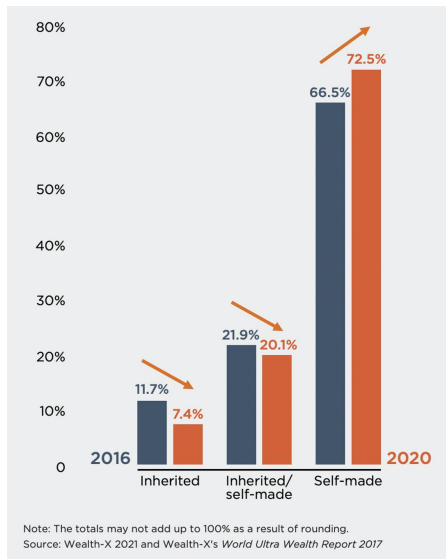


MONEY \$

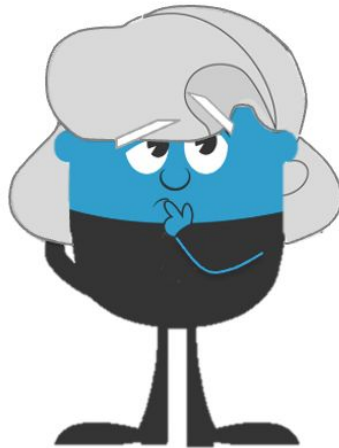


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MONEY \$



WEALTHY PEOPLE



FUNDRAISER



**DON'T KNOW HOW TO
GIVE THEIR MONEY AWAY**

MONEY CATEGORY

CASH

ASSETS

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RELATIONSHIPS

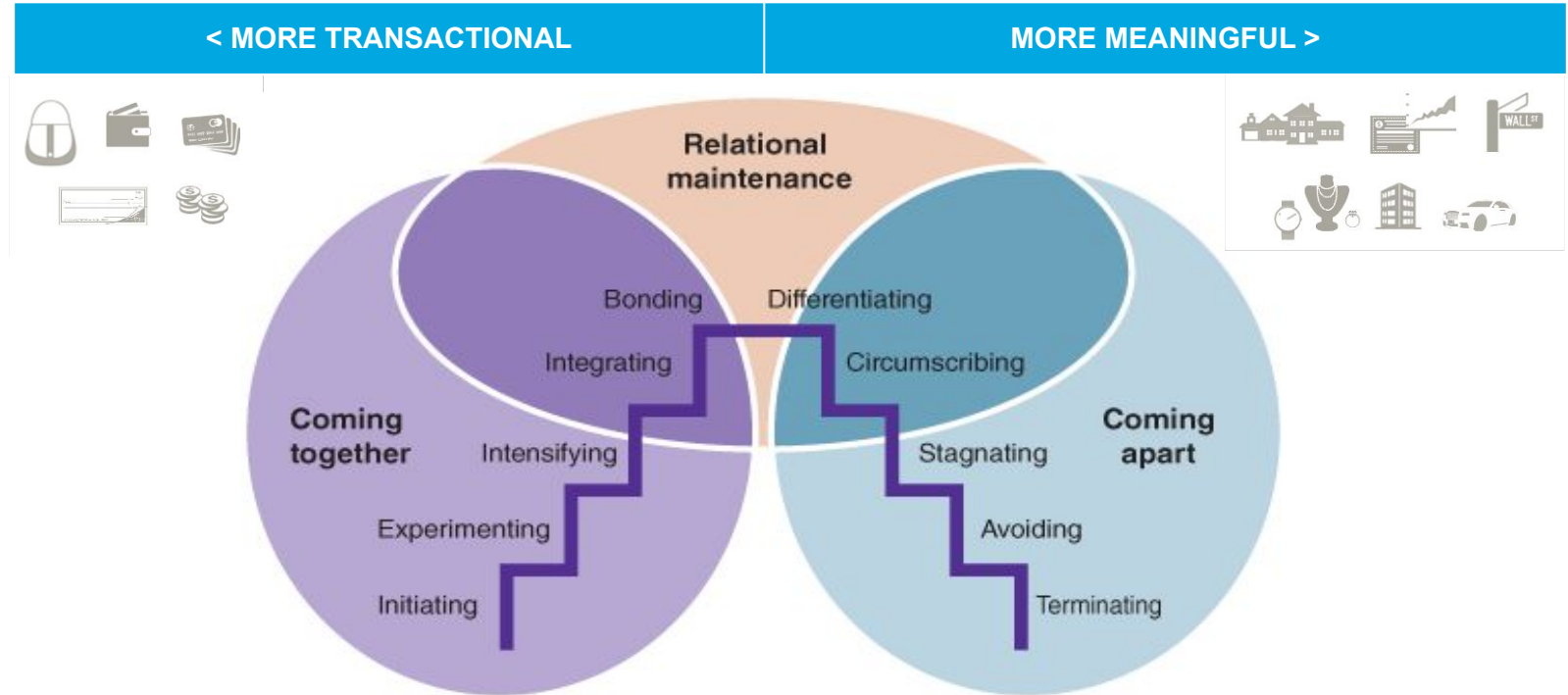


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RELATIONSHIPS

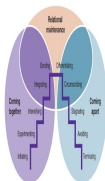


Mark Knapp's Relational Development Model
https://en.wikipedia.org/wiki/Knapp%27s_relational_development_model

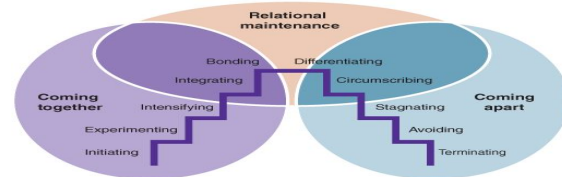
RELATIONSHIPS



< MORE TRANSACTIONAL



MORE MEANINGFUL >



Mark Knapp's Relational Development Model
https://en.wikipedia.org/wiki/Knapp%27s_relational_development_model

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RELATIONSHIPS



DONOR RELATIONSHIP TYPE

TRANSACTIONAL

MEANINGFUL

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NEEDS



MONEY CATEGORY	CASH	ASSETS
Solicitation level of difficulty	Easy	Hard
Complexity level	Simple	Sophisticated
Type of org. planning required	Tactical	Strategic
Predominant focus	Organizational/societal needs	Donor needs + organizational/societal needs
Communication approach	One-way, commercial, straightforward & removed	Bilateral, reciprocal, messy & social
Donor trust level required	Low	High
Time horizon focus	Near term & seeking immediate gratification	Long term & comfortable with delayed gratification
Staff required	Marketers & communicators	Relationship builders, counselors & advisors
Staff cost	Low	High
Addressable market (# of people)	Large & growing	Small & shrinking
Revenue potential	Low	High
Donor interest in giving	Low and declining	High and growing
Donor interest in return	Extremely poor (2:1 - 5:1)	Extremely good (10:1 - 100:1)

DONOR RELATIONSHIP TYPE	TRANSACTIONAL	MEANINGFUL
Donor objective	Get money from gifts, collect charity	Develop partnerships, support philanthropy
Organizational focus	Acquisition & money now	Retention, loyalty & lifetime value (& after lifetime)
Relationship life expectancy	Short-term	Long-term (permanent)
Marketing & communications needed	Mass, promotional & solicitous	Personalized & involving a win-win exchange of value
Methods deployed	Solicitations, premiums & gimmicks	Trust-building, engagement, service & value delivery
Organizational staff proximity	Arms length, superficial & distant	One-to-one, genuine & adjacent
Organizational benefit sought	Immediate reward & self-gratifying	Enduring & synergistic
Donor decision-making pace	Fast & impulsive	Slow & highly-considered
Donor perception of giving	Trivial yet charitable	Consequential & philanthropic
Societal consequence	Evolutionarily unstable	Evolutionarily stable

CONFLICT!



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NEEDS



CONFLICT!

**Discredited
Treated as 'others'
Scapegoated**

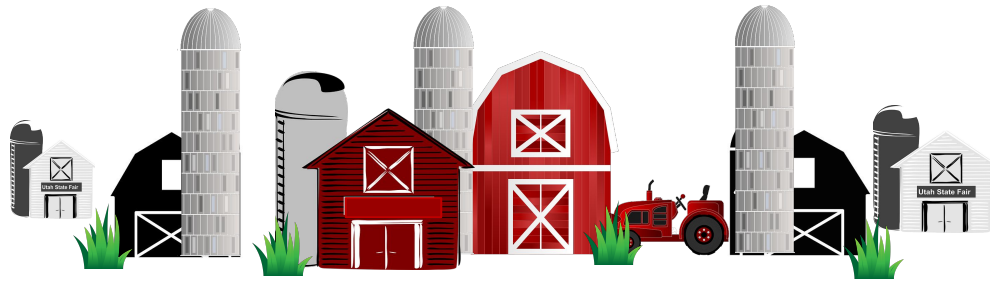


DYSFUNCTION

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FUNCTIONALITY



DYSFUNCTION

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Understand the problem

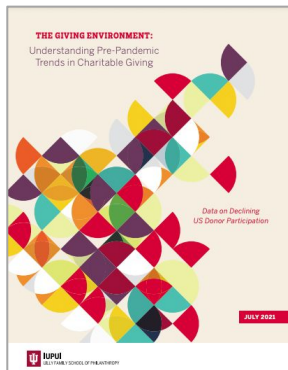
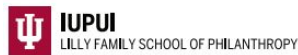
Why we must fix the problem

How to fix the problem

WHY WE MUST FIX THE PROBLEM



WHY WE MUST FIX THE PROBLEM



<https://scholarworks.iupui.edu/bitstream/handle/1805/26290/giving-environment210727.pdf>

% share of Americans who donated

ALL SOCIO-DEMOGRAPHIC GROUPS

2000 - 66.2%

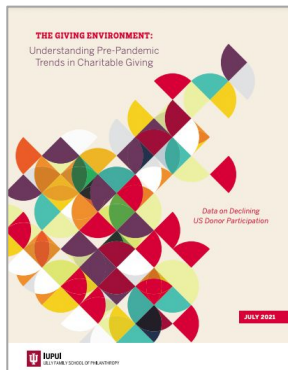
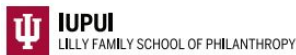
2018 - 49.6%



Most of the decline occurred **AFTER** the **Great Recession** (2007-2009)



WHY WE MUST FIX THE PROBLEM



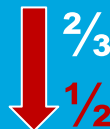
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% share of Americans who donated

ALL SOCIO-DEMOGRAPHIC GROUPS

2000 - 66.2%

2018 - 49.6%



Most of the decline occurred **AFTER** the **Great Recession** (2007-2009)

Average \$ amount Americans gave

2000 - \$1,790

2018 - \$1,280



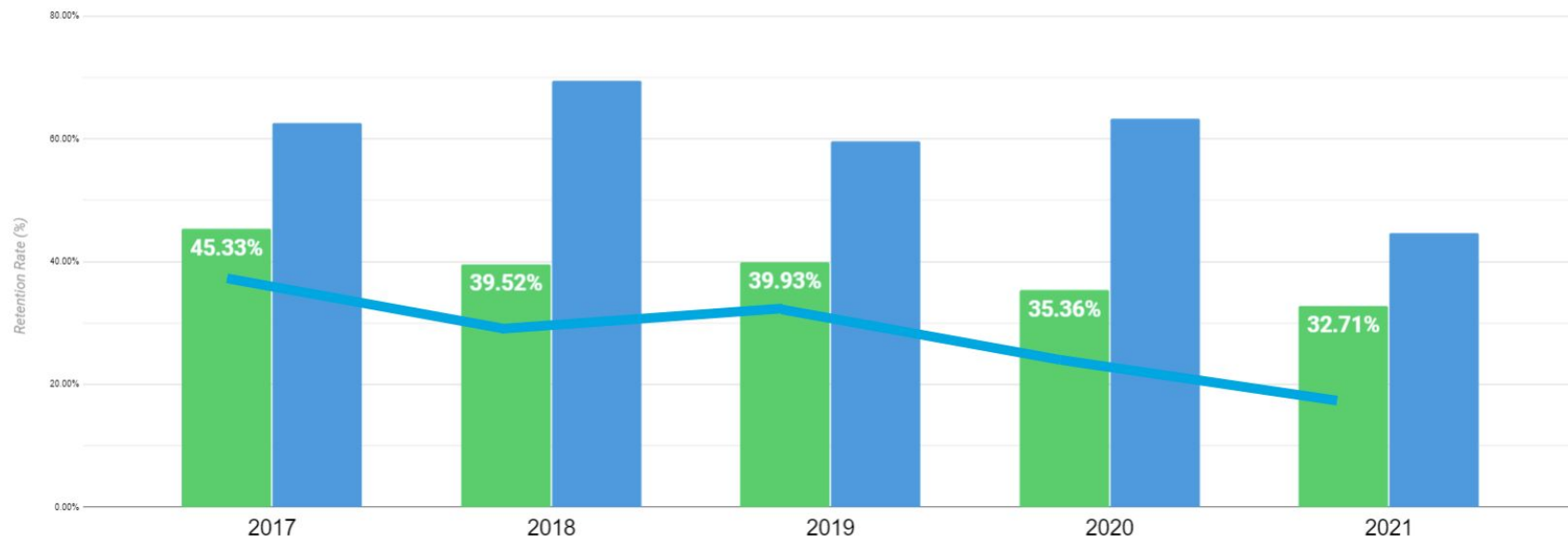
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WHY WE MUST FIX THE PROBLEM

Donors Retained



www.fundraisingreportcard.com/benchmarks

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Daily analysis of \$104 billion in charitable giving
using data from 10,000+ organizations

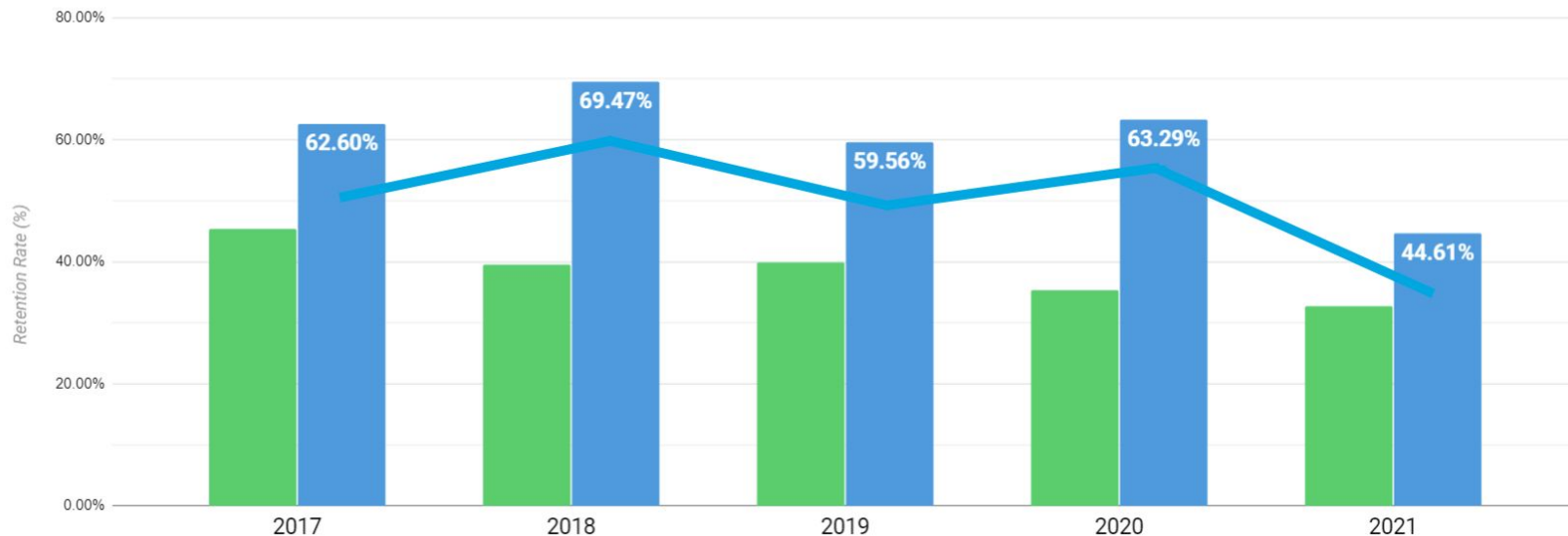
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WHY WE MUST FIX THE PROBLEM

Revenue Retained



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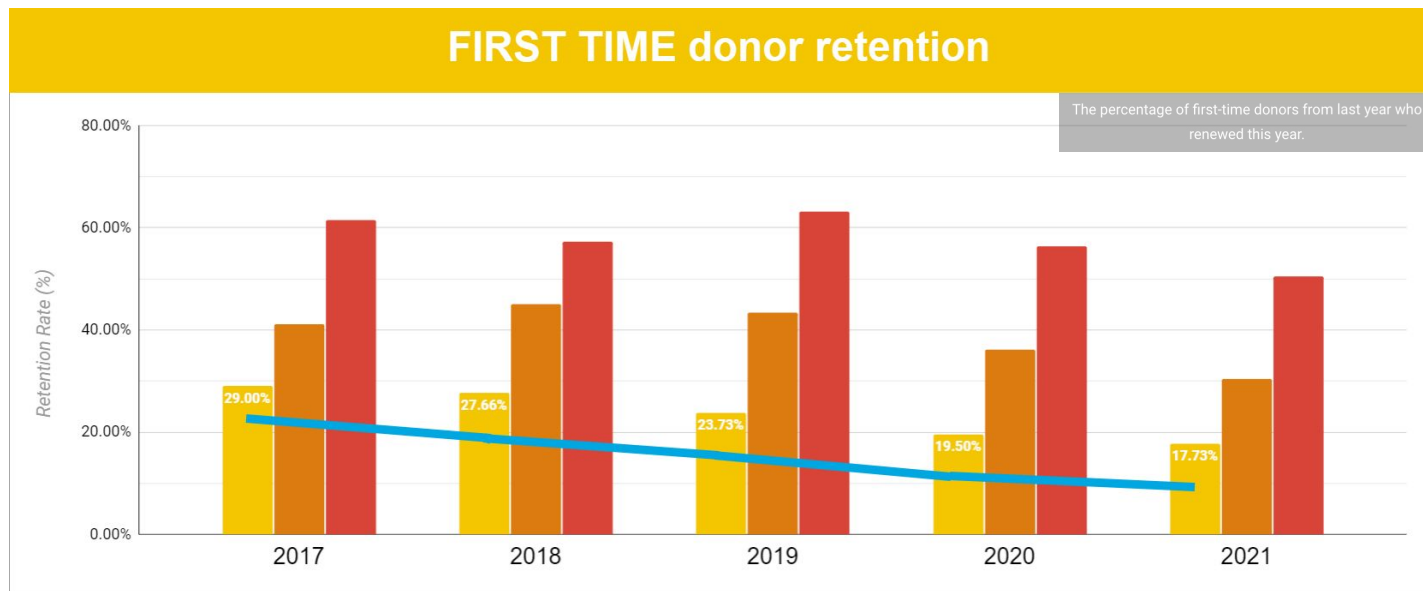


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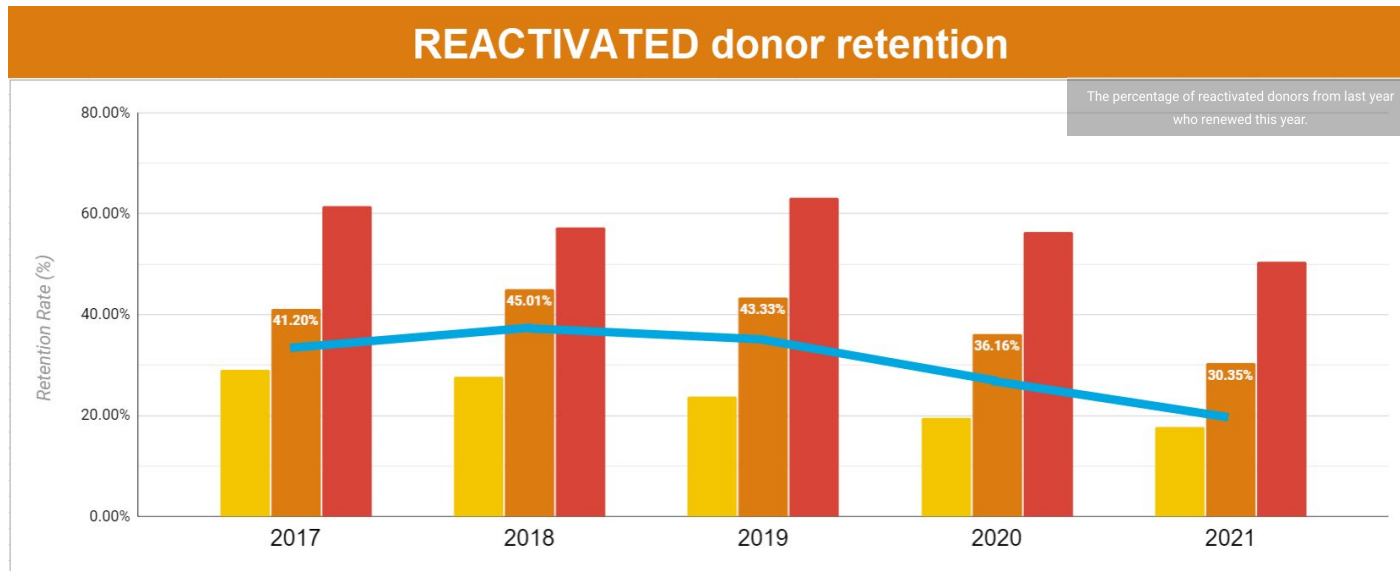
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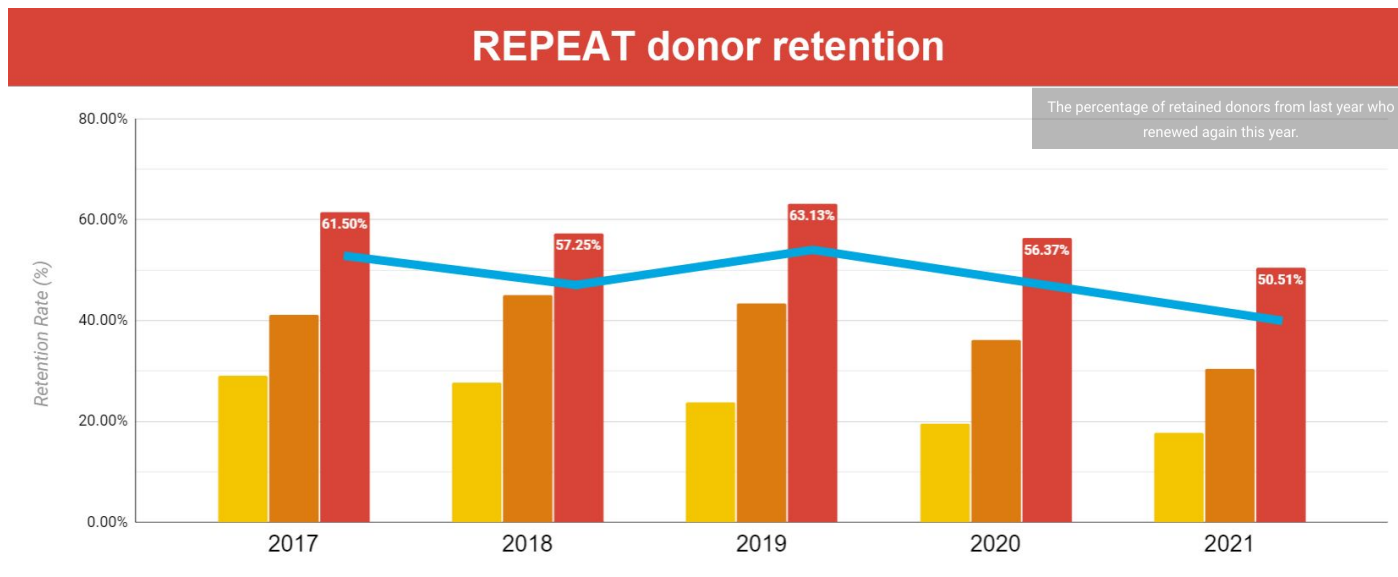
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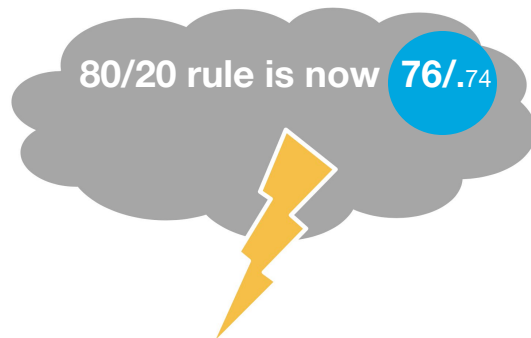
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WHY WE MUST FIX THE PROBLEM

Trust! ↓

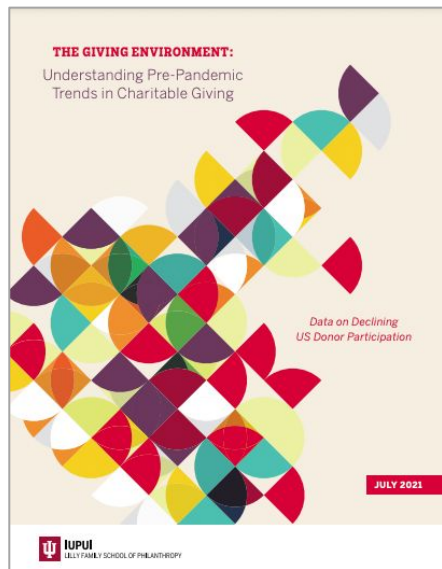
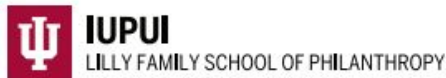
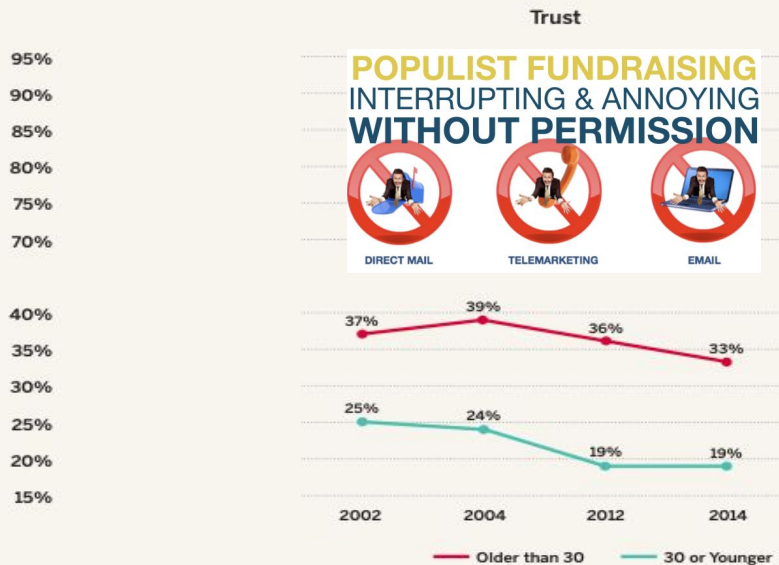


Figure 6. Changes in interpersonal trust and giving participation rates in the GSS



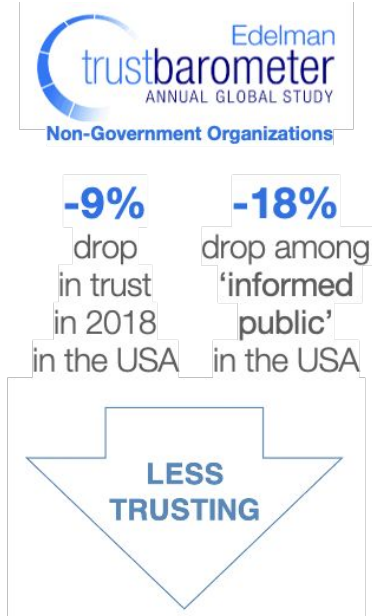
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WHY WE MUST FIX THE PROBLEM

Trust! ↓



<https://www.edelman.com/trust-barometer>



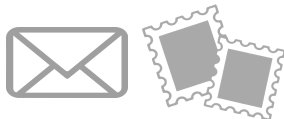
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WHY WE MUST FIX THE PROBLEM

Fundraising is getting more expensive

Inflation



Postage increased **+6.5%**
on July 10, 2022

Acquisition costs are skyrocketing
Staff salaries are increasing



Recession looming

Low-dollar donors will give less
Major donors will become wealthier

Understand the problem

Why we must fix the problem

How to fix the problem

HOW TO FIX THE PROBLEM

1 CHECK YOUR LEADERSHIP

- Vision
- Right people, right seats



CRAPP

- Clarity
- Resources
- Accountability
- Patience
- Praise

ALIGNMENT

HOW TO FIX THE PROBLEM

2 REBALANCE HERO STORIES



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HOW TO FIX THE PROBLEM

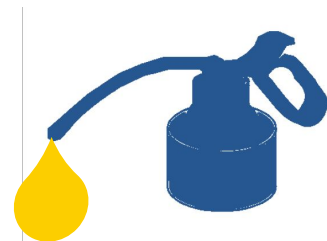
2 REBALANCE HERO STORIES



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HOW TO FIX THE PROBLEM

2 REBALANCE HERO STORIES



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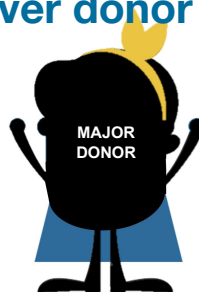
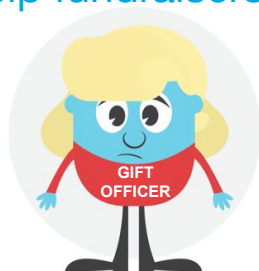
HOW TO FIX THE PROBLEM

3

EMPHASIZE COLLABORATION

Administrators must respect fundraisers and donors

- Lay down weapons!
- View fundraisers as 'translators' for donor desires and organizational needs... LISTEN!
- Let fundraisers 'negotiate' & balance donor desires with organizational needs
- Help fundraisers **deliver donor value**



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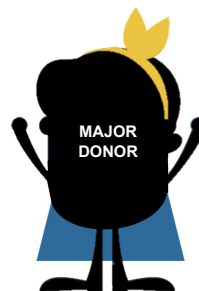
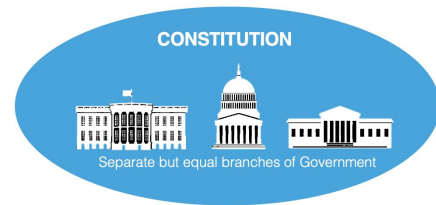
HOW TO FIX THE PROBLEM

4

TAKE A FEDERALIST APPROACH

“SEPARATE BUT EQUAL”

- Donors maintain *power*
- Administrators maintain *authority*
- Fundraisers *included & appreciated*
— not treated as ‘others’



BREAK DOWN SILOS!

HOW TO FIX THE PROBLEM

4

TAKE A FEDERALIST APPROACH

CONSTITUTION



Organizational structure selection grid

Absolute devotion to administrator's hero story

Power-sharing with a select few supporters.

Absolute devotion to donor's hero story

Federalist approach

because they maintain control and authority

Donor has no control of gift (other than not giving). Example: Nonprofit accepts only unrestricted gifts.

Patronizes donors by conveying an "isn't that nice of you" message that only motivates small "pat-on-the-head" gifts" to support the cause

One-to-many arms-length solicitations involving mass junk mail appeals, spam, telemarketing and events resulting in small gifts and very few or no gifts of assets

because they become an administrator and the two hero stories merge

Donor has limited control. Example: Donor is a board trustee or

Helps donors become leaders responsible for the success of the mission they share with the administrators

A community of like-minded, committed and engaged high wealth individuals flourishes to support future cooperative ventures among members resulting in serious financial support.

because the donor has all the power and honor

Donor has complete control of gift. Example: Donor creates a private family foundation.

Administrators believe they maintain their hero story because they get money their organization deserves but they must find foundations willing to fund the outcomes they supply

Administrators fight for the privilege of doing the donor's bidding or they don't get the grant.

because they maintain authority while major donors feel good because they can always walk away

Donors get the valuable experience they want, or they seek alternatives

Provides value to donors, administrators, and especially fundraisers (they feel included as respected participants in issues affecting fundraising)

Fundraisers operate as the sage for the donors and the translator for the administrators and are respected by both heroes

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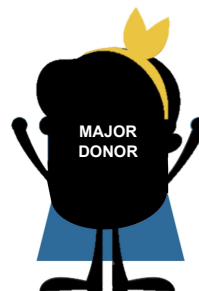


HOW TO FIX THE PROBLEM

5

REVISE WHAT METRICS YOU MEASURE

- Avoid transactional & activity-based metrics
- Pipeline size, velocity, value-delivery metrics
- Kill all unrealistic & arbitrary goals
- Kill all vanity metrics
- **Eliminate scapegoating!**
This is a team effort!



HOW TO FIX THE PROBLEM

- ✓ CHECK YOUR LEADERSHIP
- ✓ REBALANCE HERO STORIES
- ✓ EMPHASIZE COLLABORATION
- ✓ TAKE A FEDERALIST APPROACH
- ✓ REVIEW WHAT METRICS YOU MEASURE



ASSESSMENT RESULTS QUESTIONS



INTRODUCING



DONOR STORY: EPIC FUNDRAISING ECOURSE with Dr. Russell James

The only online fundraising training course that
helps **fundraisers** **improve their skills**
&
helps **staff** **work together more collaboratively**



Based on research conducted by

DR. RUSSELL JAMES

World-class educator & researcher

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Hall of Fame



NATIONAL ASSOCIATION of Charitable Gift Planners

DONOR STORY:
EPIC FUNDRAISING

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Based on research conducted by

DR. RUSSELL JAMES

Ph.D. in consumer economics

Former Director of Planned Giving

Former President of a college

Completed 2 major capital campaigns

Built several debt-free buildings

Tripled enrollment

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What to **say and do**

Why it **works**

How to get everyone on the **same page**
rowing in the same direction



BREAK DOWN SILOS!



SECTOR-WIDE CHALLENGES

SECTOR-WIDE CHALLENGES

What *really* works?

SECTOR-WIDE CHALLENGES

What really works

Internal friction/silos/misunderstanding?

SECTOR-WIDE CHALLENGES

Not sure know what *really* works

Internal friction/silos/misunderstanding?

High rates of staff turnover?

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One low annual subscription > Unlimited students

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“This has been **really helpful**,
and I’ve already used the conversations
with our team, so they better understood it too!”



Cindy Atmar

THE UNIVERSITY OF TEXAS
MD Anderson
~~Cancer~~ Center
Making Cancer History®

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Learn how to:

Properly identify & engage the top 13% of supporters who provide 88% of your revenue (on average)

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Learn how to:

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Ensure that 98% of your major gifts **come without restrictions**

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Help major gift officers **improve their performance** by leaps and bounds without working harder or more hours

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Find outliers—super-wealthy people ‘hiding’ in your database without spending money on wealth screening

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Help major gift officers **improve their performance** by leaps and bounds without working harder or more hours

Find outliers—super-wealthy people ‘hiding’ in your database without spending money on wealth screening

Use words and sentences that really work

Build a culture of philanthropy internally so your team **works together to raise more money**

Research + Theory + Practical Application

MAJOR GIFTS — INCLUDING LEGACY GIFTS

Research + Theory + Practical Application

MAJOR GIFTS — INCLUDING LEGACY GIFTS

ALL LEVELS OF GIVING

"This model of the hero story
was a **new way of thinking** for me."



Gary Grant



*Florida Institute
of Technology*

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Would this be beneficial to you and your team?

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Read-along transcript

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LIVE MONTHLY MASTERMIND MIXERS

"I feel so privileged to get to participate in these 'Mastermind Mixers', what a wonderful group of people – and your team members are so energizing and positive."



*Jill Nelson
Associate Vice-President
The Princess Margaret Cancer Foundation*

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20 ½  **CFRE** **CREDITS**
CERTIFIED FUNDRAISING EDUCATOR

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FAST TRACK

19 fun, engaging & brief video lessons

2 ½ hours

2.5 CFRE credits

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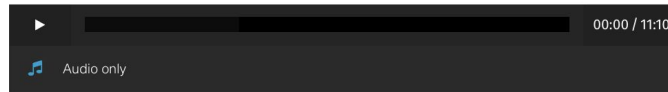


Donor Story - Epic Fundraising with Dr. Russell James / Modules / The Storytelling Fundraiser / [Introduction to the Series: The "One Big Thing" in Fundraising](#)



Story

- 16  Putting A Victory In The Fundraising Ask: What Changes If I Give?
- 17  Putting A Challenge In The Fundraising Ask: You Want Me To Do What?
- 18  Finish The Story Or Lose The Donor: Delivering Victory With Impact Reporting
- 19  Before You Move On
- 20  Module 1 Quiz
- 21  Module 2 Quiz



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J.D., Ph.D., CFP®

Dr. Russell James is the foremost researcher in the field. Many believe he has revolutionized the way nonprofits approach

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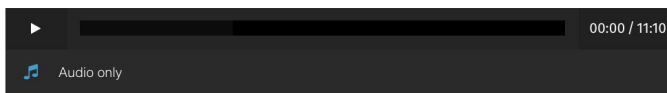
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Course Content

21 Lessons

- ▶ Introduction to the Series: The "One Big Thing" in Fundraising
- 2 At The Heart of Philanthropy Is Story
- 3 Understanding Fundraising Story With a Brain Scanner
- 4 Can I See Your Character? When Fundraising Story Is In The Details
- 5 Math Problems In Fundraising Story: Motivations & Barriers
- 6 Solutions In Fundraising Math: Story



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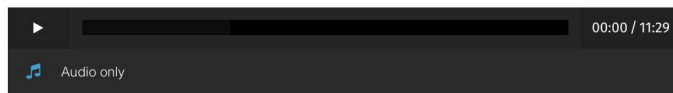


My journey

- I've always focused on charitable giving
- But I never planned to study story
- I was always more of a "numbers guy"

0:29

Play Video



At The Heart of Philanthropy Is Story

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[At The Heart of Philanthropy Is Story - Activity](#)

Course Content

21 Lessons

- 1 Introduction to the Series: The "One Big Thing" in Fundraising
- ▶ At The Heart of Philanthropy Is Story
- 3 Understanding Fundraising Story With a Brain Scanner
- 4 Can I See Your Character? When Fundraising Story Is In The Details
- 5 Math Problems In Fundraising Story: Motivations & Barriers

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Julie Hollowell



Boston's Local NPR®

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Words That Work

with Dr. James • 50 minute training session

[Value \$297]



DR. RUSSELL JAMES

WORDS THAT WORK:

{ THE PHRASES
THAT ENCOURAGE
PLANNED GIVING }



BONUS #2

Words That Work

with Dr. James • 50 minute training session

[Value \$297]

How to Raise Major Gifts of Assets

with Dr. James • 50 minute training session

[Value \$247]



BONUS #3

Words That Work

with Dr. James • 50 minute training session

[Value \$297]

How to Raise Major Gifts of Assets

with Dr. James • 50 minute training session

[Value \$247]

How You Can Land More Meetings

with Greg Warner • 50 minute training session

[Value \$97]



BONUS #3

Words That Work

with Dr. James • 50 minute training session

[Value \$297]

How to Raise Major Gifts of Assets

with Dr. James • 50 minute training session

[Value \$247]

How You Can Land Meetings

with Greg Warner • 50 minute training session

[Value \$97]

All 3 bonus training sessions

[Total value \$641]

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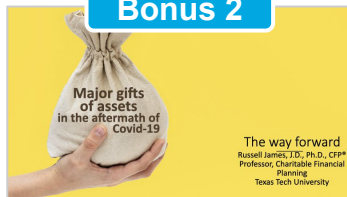
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WORDS THAT
WORK:

{ THE PHRASES
THAT ENCOURAGE
PLANNED GIVING }

Bonus 2

Major gifts
of assets
in the aftermath of
Covid-19

The way forward
Russell James, T.D., Ph.D., CFP®
Professor, Charitable Financial
Planning
Texas Tech University

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HOW YOU CAN
LAND MORE
MEETINGS

with major donor prospects who are ready for your outreach

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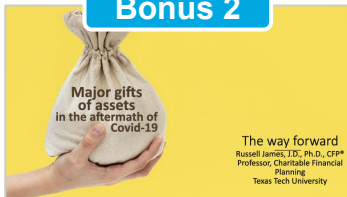


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Bonus 2



Bonus 3



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Bonus #3 Land Meetings	\$ 97
Monthly Mastermind Mixers	\$1,000
	\$3,638



DONOR STORY: EPIC FUNDRAISING

Bonus 1

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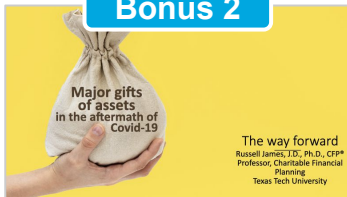


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Bonus 2



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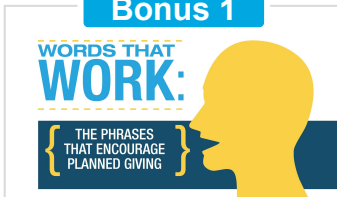
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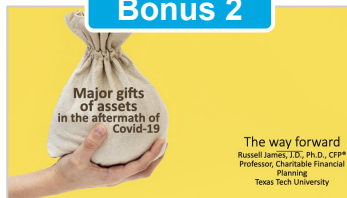


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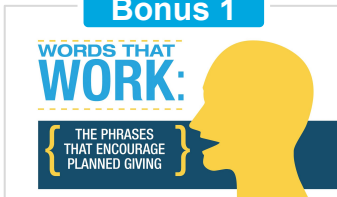
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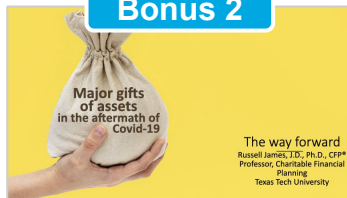


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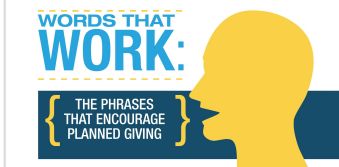
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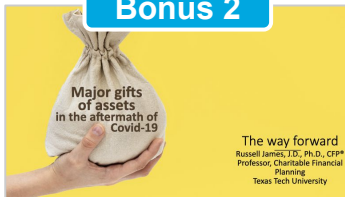
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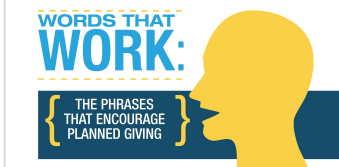
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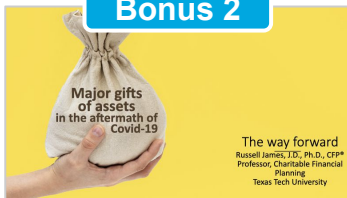
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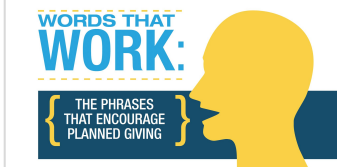
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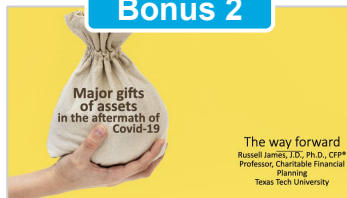
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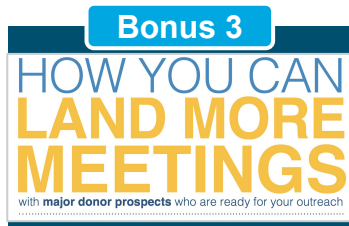
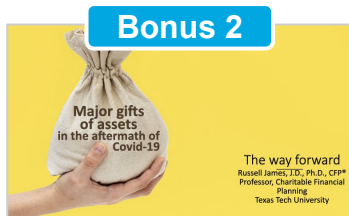
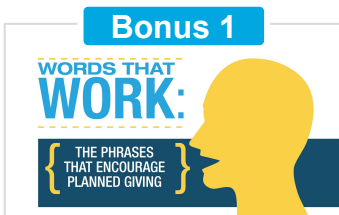
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\$1,024 TOTAL



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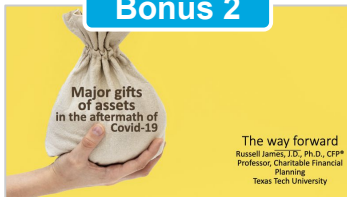
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ECOURSE

HOW WE HELP YOU

RESULTS

LEARN

COMPANY

CONTACT

LET'S TALK - SCHEDULE 15 MIN

FOR CONSULTANTS

BE THE FUNDRAISER YOU ALWAYS WANTED TO BE

We help you get **more meetings** with
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ASSESSMENT RESULTS QUESTIONS



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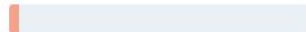
All teams working at my organization (not just fundraisers) recognize and agree that providing value to supporters is essential for building trusting relationships.

CHOICES ▾

ANSWERS ▾

1 = Definitely NOT true

5



2 = Not very true

32



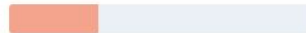
3 = Somewhat true

54



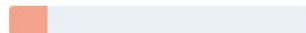
4 = Pretty much true

46



5 = Absolutely true

20



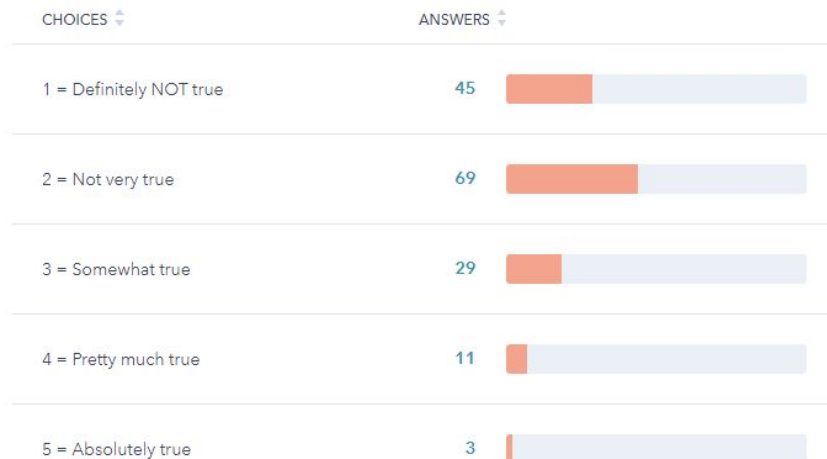
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All teams have a clear understanding of the process each donor undergoes as they consider making a consequential major gift of assets or a legacy gift.



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All teams understand and accept the fact that most donor dollars come from major gifts of assets and large legacy gifts (the outliers) and that focusing on raising those gifts generates the most revenue at the lowest cost.



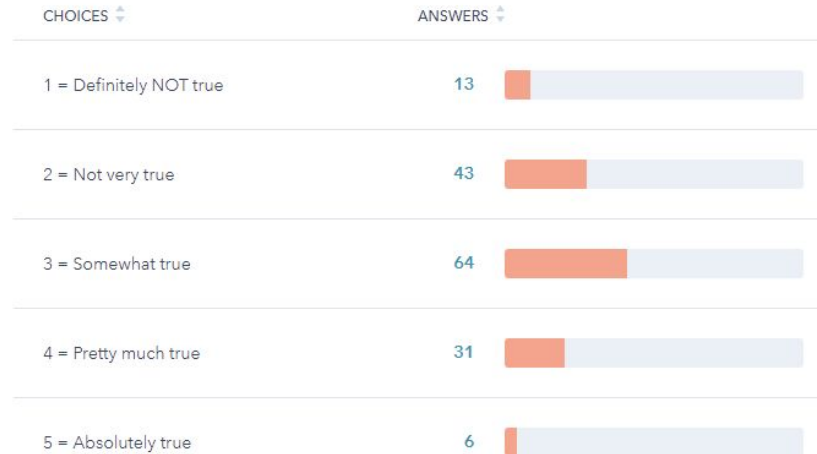
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All teams adhere to a collaborative approach that involves separate but equal power among internal organizational departments. As a result, input from fundraisers and donors is accepted with the same weight as input from administrators and other insiders.



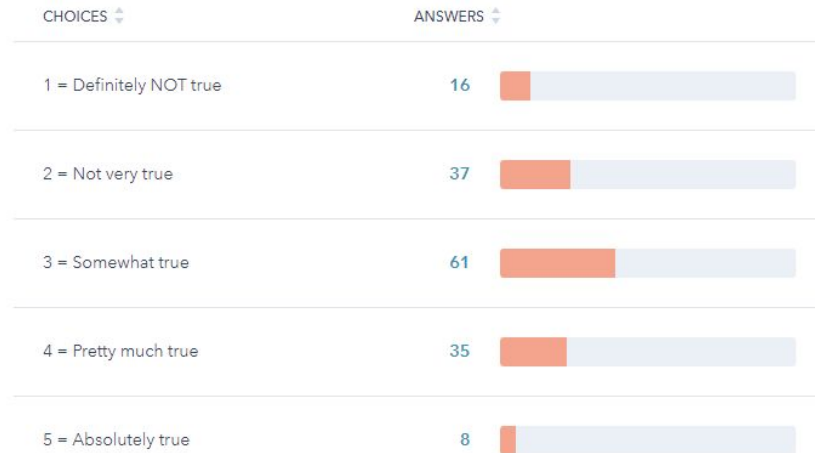
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All teams recognize and agree that a fundraiser's job involves operating as a champion for and provider of donor value as well as the translator for donor needs.



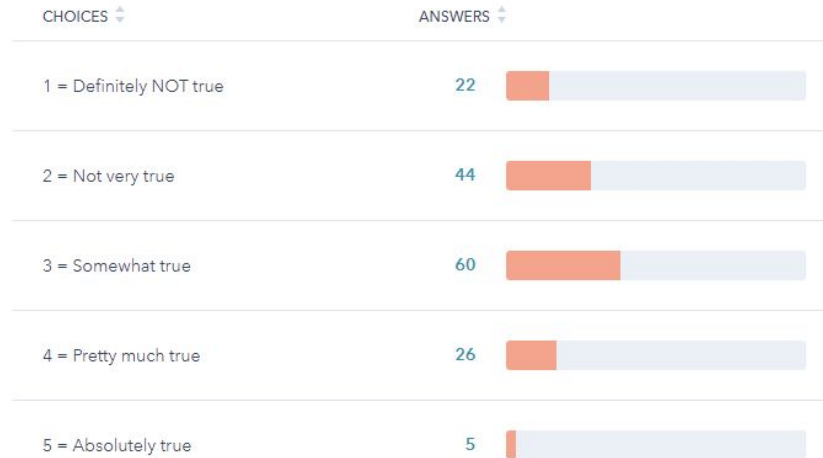
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All teams work together to make sure fundraisers are not discredited or treated as “others” and, rather, are supported, heard, and collaborated with in relation to donor needs and the provision of value by the organization to the donor.



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All teams work together to report back to donors so they continue to recognize the value they gained through their philanthropic contributions.



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