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fundraising is a profession . . . coaching should be considered– page 3

also in this issue...

- how viable and successful is your fundraising? – jim datson, director, project periscope
- getting stuff done – craig fisher, consultant, rsm
- measuring and optimising supporter engagement – tony lindsay, founder director, www.vega.works

contents

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Contents

editorial.....	2
fundraising is a profession and like other professions – coaching should be considered.....	3
people, gifts, grants and sponsorships.....	6
how viable and successful is your fundraising?	8
Champions of Change in the charity and non profit sector.	11
getting stuff done!.....	12
five ways to set your not-for-profit up for fundraising success in 2019	14
Q&A12 Malcolm Sproull	16
measuring and optimising supporter engagement.....	18

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fundraising is a profession and like other professions – coaching should be considered

by jason ketter, consultant, askright

You may have heard of Anna Sophia Robb or Carrie Underwood, but perhaps not New Zealander Miranda Harcourt, their coach. Helen Hunt 1997 Oscar winner for her role in *As Good as It Gets* thanked Larry Moss during her acceptance speech. Who is Larry Moss? Her acting coach. Keith Urban has a voice coach, Renee Grant-Williams. It would be hard to name a successful world class athlete, such a former All Blacks great Rich McCaw, who wasn't influence by a coach or coaches. The professional at the top of his or her profession has a coach. Members of the senior management team at universities and leading corporations often are assigned a professional coach to help them with skills in the areas of leadership, communications, or interpersonal development.

It is time that the fundraising profession embrace the notion of the professional fundraising coach to support fundraisers seeking to enhance performance outcomes. Fundraising is a rewarding career, but it can also be very challenging. And like any profession to take your game to the next level an experienced subject matter expert coach can help.

coaching is not mentoring

When commencing a job people often suggest securing a mentor. A mentor, however, is distinct from coaching. Unlike mentoring, which is reactive and serves more as a type of a sounding board relationship, coaching is proactive—hands on. Coaching is focused on bringing about effective change in the professional for the purpose of higher performance. Further, after receiving candid advice from a quality coach the coach will follow up on that advice to see if the coachee is acting on it, i.e., seeking a demonstrated and sustainable behavioural change. Coaching and mentoring are not mutually exclusive, but the objectives and outcomes can be dramatically different for the individual.

Retaining a coach and committing to a program requires a time commitment, spread over weeks, as well as a financial commitment. Therefore, it is important to ensure that the coach, and his/her program, is a fit for the needs of the coachee. Components of a good coaching program:

- the program is tailored to meet the specific needs of the coachee;

- the program is developed with relevant research and theory, but used only as reference not the focus of the program;
- the examples used throughout the program are real world and incorporates scenarios taken from the coachee's particular situation;
- role playing—practice (lots of it!); and
- the coach is an experienced subject matter expert who has experience coaching fundraisers.

a tailored program

The importance of a tailored coaching program can't be stressed enough because not all fundraising programs are at the same level of maturity; this may impact priorities of the frontline fundraisers. For example, in a less mature program prospect relationships haven't been built and the priority will be on discovery visits versus a more mature fundraising program in the final push of a multimillion-dollar campaign with a higher focus on solicitations. A quality program will cover the elements of the donor giving cycle, e.g. identification to stewardship especially for a fundraiser new to the profession, but there will be a focus on the highest priority areas, typically handling objections, visits, and solicitations.

All sessions should be scheduled upfront for the duration of program, e.g. like signing up for a university course, and requires an attendance commitment. Finally, with technologies like Skype or Zoom a coach can be in Australia and the coachee in New Zealand.

research and theory

Fundraising research is not on the top of the list for most research universities, it doesn't attract the same type of research investment like medicine, engineering, or business. However, there are quality research papers and books on understanding donor behaviour, the efficiency of a fundraising program, effective prospect research, and the development of a prospect portfolio taken from an expansive database. Quality research informs outstanding practice and given the nature of fundraising (part art and part science) staying abreast of the latest research, as well as understanding of the foundational research in the field, can contribute to better performance.

real-world examples

Fundraising is a people business and understanding different personalities, and the scenarios that arise as a result, comes through experience. An experienced coach can demonstrate situations through real-world examples that are most relevant to the coachee and his/her organisation. There is nothing wrong with speaking of aspirational gifts, but if examples used are all about eight-figure gifts and the organisation largest ever gift is a five-figure it can be demoralising for the coachee. Further, a coach with experience can share about the times things didn't go right—those coachable moments that can be shared with the coachee. Undertaking a coaching program that is all pie in the sky will lead to disappointment for the coachee when he/she encounters those situations that didn't emulate all the rosy situations shared in the program.

Further, it is most beneficial to employ the coachee's prospect list to talk through strategy and discuss possible next steps. An important role of a coach is to play devil's advocate and walk through scenarios with the coachee to help the coachee think through a variety of possible outcomes when interacting with a prospect. Although one can attempt to script a visit or solicitation like many things in life things don't always follow the script. Working with a coach helps a coachee develop those critical adlib skills.

role playing

How do our favourite actors and athletes make their craft look so easy? How about the ballet dancer who moves so gracefully across the theatre stage? We know what they do takes enormous skill and talent to say the least, but rarely do we picture all the hours that went into the rehearsals necessary to make it a star performance. One gets better at something by practicing it. Fundraising is no different.

If you are only making one face-to-face solicitation every quarter the chances are without any practice in between you run the risk of being a little rusty when you conduct your next solicitation. When the All Blacks are shown on the local news they often are shown moving up and down

the field passing the ball back and forth between players. The pass is critical to any successful rugby team and so they practice it over and over and over. Players are developing muscle memory, endurance, and mental strength so in game situations execution is automatic.

Granted the solicitation is not like throwing a rugby pass, but having a demonstrated ability, e.g. it is not the first time you have encountered an objection, is similar. Just like the pass if you fumble the objection during the solicitation the solicitation is not going to end well. Role playing on how to overcome objections, how to secure the discovery visit, how to conduct the discovery visit as well as how to carry out the solicitation will ensure quality skills are being developed to support securing those major and leadership gifts.

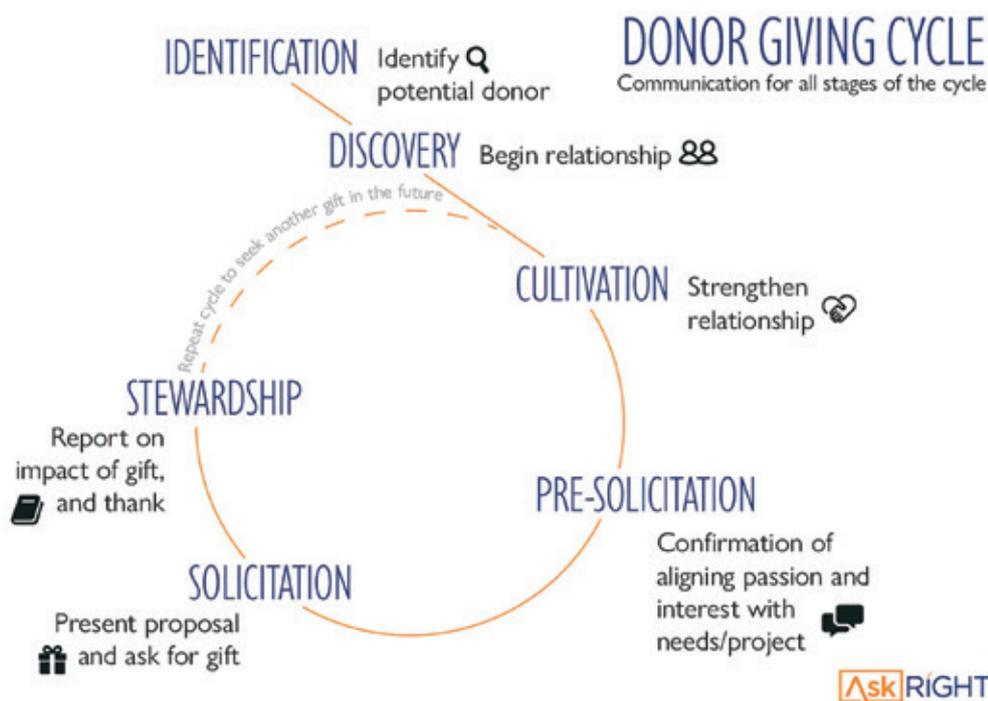
an experienced subject matter expert coach

George Bernard Shaw wrote in his play *Man and Superman* "He who can, does. He who cannot, teaches." There are a plethora of examples where this does not ring true. Richard Williams never played professional tennis, but did very well coaching his two daughters, Venus and Serena to championships early in their careers. Conversely, just because someone is good at something doesn't mean this person will be good at coaching it. Coaching is about helping the individual to understand themselves and creating positive, and sustainable, change to help the individual achieve their objectives. Quality coaching involves excellent communication skills and detailed knowledge of the subject matter. When it comes to fundraising, however, a diverse background of real-world experiences by the coach, in all facets of the profession, is needed to greatly enhance the outcome for the coachee.

Trust and honesty are cornerstones in a relationship between the coach and coachee. Without them communication between the two will be stifled. Additionally, an experienced coach can bring to the relationship not only the "how tos", but also the "how not tos." Learning from someone with vast experiences can progress an individual's skill set more rapidly than learning from a coach who has limited experience. Further, you become better at something by doing it and by practicing it (fundraising is no exception). However, practicing throwing the rugby ball using the incorrect techniques will not lead to a more successful outcome during the game.

Investing in your own professional development, or for a member of your team, by employing an experienced coach with a diverse and successful fundraising background will positively influence performance outcomes. Fundraising is a profession. Like other professions fundraising should embrace the concept of using coaches to improve performance and it should be the norm, not the exception. ■

the coaching program will cover all aspects of communication within the donor giving cycle



- Elements of a Coaching Program Curriculum
- Conversation and listening skills
- Donor and Portfolio Assessment
- Elements of the Discovery, Cultivation, Solicitation and Stewardship visits
- Evaluation of job descriptions and resources, e.g. database health
- Overcoming Objections
- Personality Types and Major Donor Types
- Rehearsal and role playing
- Securing the Visit

Dr Jason Ketter

Jason is Senior Consultant at AskRIGHT and brings more than 30 years of fundraising and engagement experience to clients in their quest to raise more money.

Jason has extensive hands-on organisational programming, operational development, and fundraising expertise with a proven track record for increasing performance. He understands the challenges and opportunities that exist in both under-resourced and appropriately-resourced organisations.

Jason has led advancement teams and served campaigns that raised \$10 million to \$2 billion. Jason has conducted reviews, advised nonprofit organisations, and coached professional fundraisers in Australia (e.g., Amnesty International, Cancer Council Queensland, Catholic Mission, Royal Children's Hospital Melbourne, St Mark's College, Queensland Art Gallery and Gallery of Modern Art), the UK, the USA, and the Sultanate of Oman. Jason has advised the Australian Department of Foreign Affairs and Trade writing the strategic plan



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