



FUNDRAISING IN THE FACE OF CHANGE

Friday, 3 November 2023



Fundacja Akademia
Organizacji
Obywatelskich

YOUR PRESENTERS



Alice L. Ferris, MBA, CFRE, ACFRE

30+ years in the charitable sector
Adjunct Faculty, University of Denver
MBA, University of Wisconsin-Madison
Certified Fundraising Executive since 1999
Advanced Certified Fundraising Executive since
2010



Jim Anderson, CFRE

35+ years experience in sales and marketing
Almost 20 years in the charitable sector
Passionate advocate for progressive causes
Certified Fundraising Executive since 2013



- ✓ **Your name**
- ✓ **Your organization**
- ✓ **What you do**
Explain in a way that your family would understand
- ✓ **Years experience in the field**

AGENDA



- 1 Defining challenges
- 2 Understanding tactics to adapt to change
- 3 Creating the framework for a resilient plan
- 4 Making your plan actionable

Part 1

DEFINING CHALLENGES

“**TO INSPIRE CHANGE WE
NEED TO HAVE BOTH
OUTRAGE **AND** HOPE.**”



Erica Chenoweth, Harvard University, Author, *Civil Resistance: What Everyone Needs to Know*

INPUT

**WHAT CHALLENGES DOES
YOUR ORGANIZATION
FACE TODAY?**

NEW DONORS
COMPETITION
ISRAEL
UKRAINE
DONOR FATIGUE
ACCOUNTABILITY
TECHNOLOGY
GULF
CULTURE
INCLUSIONS
EQUITY
AI
URGENT
COSTS
WAR
CONFLICT
ECONOMY
CHANGE
EMERGENCY
POLARIZATION
GENERATIONS
CONTROL
PRESSURE
POLITICS
DONORS
MAKING UP FOR LOST TIME
DIVERSIFY

Part 2

UNDERSTANDING TACTICS TO ADAPT CHANGE

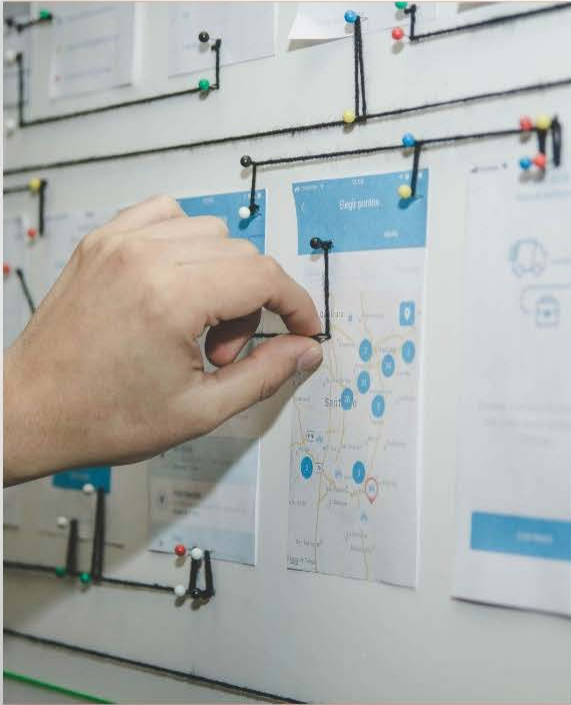
THE “NEW NORMAL”
CHANGE IS THE STATUS QUO
LACK OF CONTROL IS EXPECTED

C H A N G E

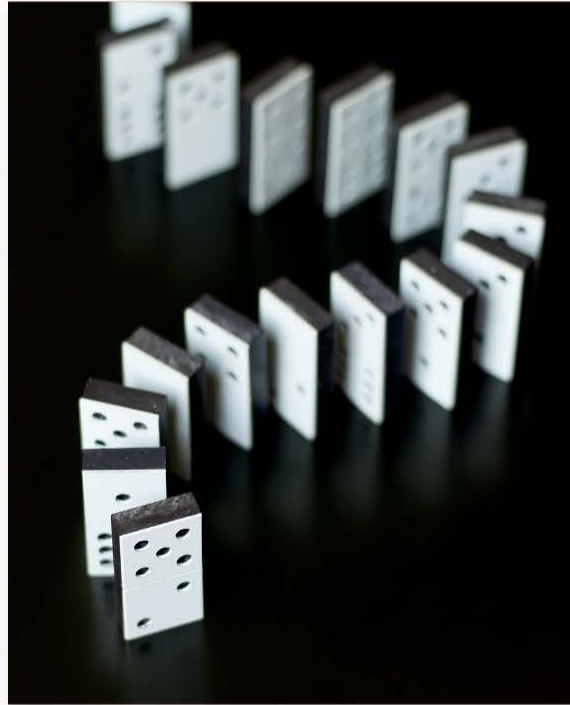
Section 1

STAGES OF CHANGE

TYPES OF CHANGE



Planned or Developmental Change



Responsive Change



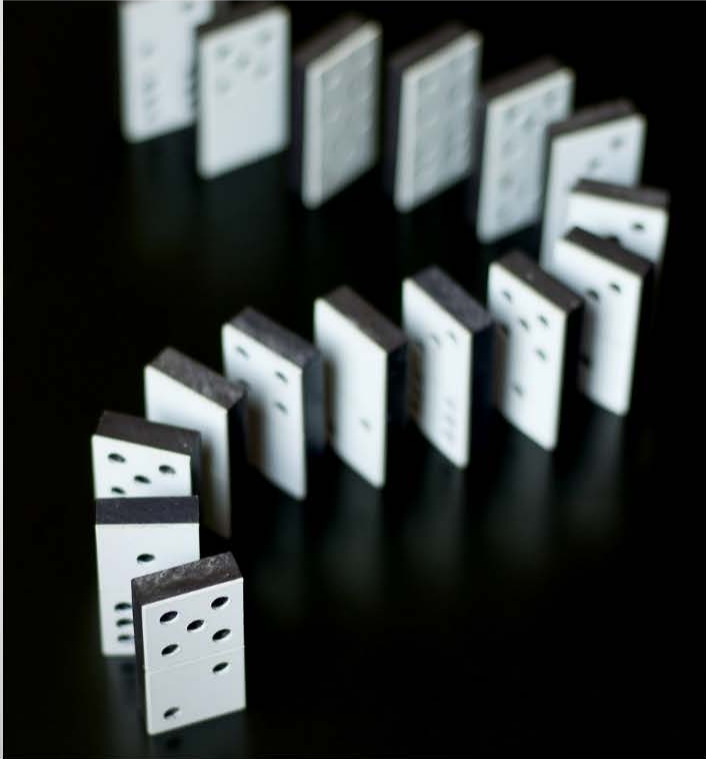
Reactive change

REACTIVE CHANGE



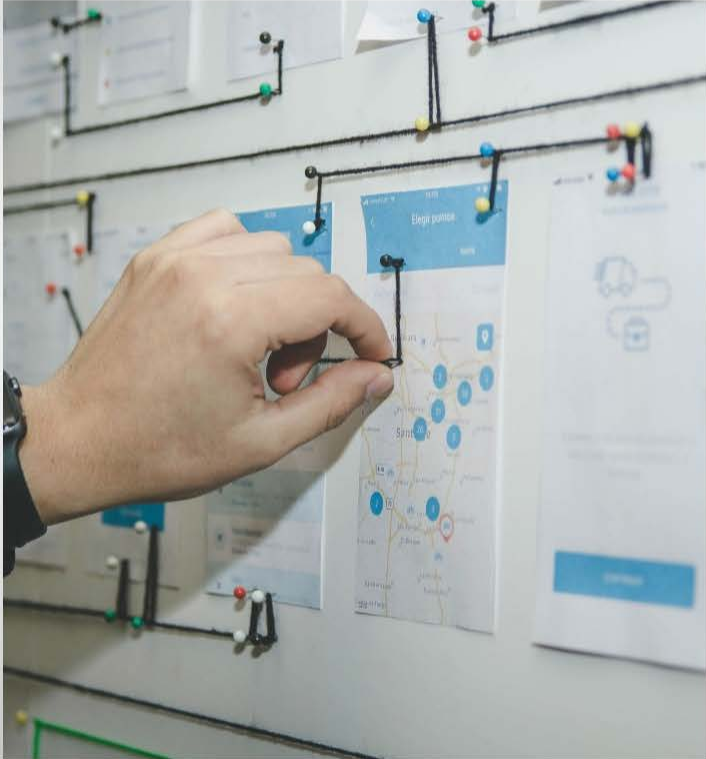
- **Unpredictable**
- **External**
- **Example: The Pandemic**

RESPONSIVE CHANGE



- **Can often be anticipated**
- **External**
- **Examples**
 - Regulatory change
 - Action by a competitor
 - Funding change

PLANNED CHANGE



- **Scheduled or proactive**
- **Internal**
- **Incremental or “rip off the bandage”**

Examples

Personnel change

Procedural change

Technology change

Section 2

UNDERSTANDING HUMAN RESPONSE



**PEOPLE ARE NOT
INTENTIONALLY DIFFICULT**

(Most of the time)



ARCHETYPES IN CHANGE

3 Types of Difficult Coworkers and How to Work with Them

Amy Gallo, Harvard Business Review, May 30, 2023

THE PESSIMIST



- Motivated by **anxiety**, a desire for **power**, or **resentment** for how they've been treated in the past.
- Might have legitimate reasons for being negative
- Negative attitudes can be contagious

THE PASSIVE-AGGRESSIVE



- Not forthcoming about what they're truly thinking
- Use indirect methods to express thoughts and feelings
- Driven by the **fear of failure or rejection**, a **desire to avoid conflict**, or a **feeling of powerlessness**

THE KNOW-IT-ALL



- Confidence without competence
- Ignores feedback, acts condescendingly, and takes credit for group successes
- Triggered by **feelings of insecurity** or **encouraged by organization or cultural norms**

PROBLEMS V. CONDITIONS



Problems

Can be solved, resolved or fixed
May be intellectual



Conditions

Must be managed or adapted to
May be emotional

GROUP EXERCISE

IDENTIFY THE PROBLEM

**CREATE AVATARS OF
THE HUMAN RESPONSE**

IFC Highlights

CONSIDERATIONS FOR CHANGE

WHY PEOPLE POWER HAS SUCCEEDED IN THE PAST

Erica Chenoweth

- **Large diverse participation**
- **Loyalty shifts among pillars of support**
- **Discipline despite escalation of oppression**
- **Variety of non-violent methods**



UNITE AND ADAPT

ERICA CHENOWETH

Consistency

Build large diverse participation and sustain momentum

Cognitive Dissonance

Build strategies to induce defections among the pillars

Personal Connection

Tactical innovation beyond digital activism

Share Ideas

Cooperation, convening, and training across global grassroots movement ecosystems

THE ELEVATOR SPEECH



ELEMENTS

- **Who you are**
- **What you do**
- **Why it matters**
- **How you can be a part of it**

**WHY IT MATTERS IS
THE MOST IMPORTANT**

our time, ssics.

HOTTER. JUICIER. TASTIER.
THE CLASSICS. REMASTERED.

Big Mac® 540 Cals
Cheeseburger 290 Cals
Quarter Pounder with Cheese® 520 Cals

McCafe
LI'L DONUTS

BOSTON CREAM 190 Cals
UPUNKLE 190 Cals
APPLE FRITTER 200 Cals
MAPLE CARAMEL 200 Cals
STRAWBERRY JELLY 160 Cals

99¢ \$1.79 \$4.99 \$9.49

McCafe BAKERY

LI'L Donuts \$.99 \$ 1.79 \$ 4.99 \$ 9.49

1/2 Dozen 800 Cals
Boston Cream 190 Cals
Maple Caramel 200 Cals
Sprinkle 160 Cals
Strawberry Jelly 160 Cals

Baked Muffin \$ 1.49 \$ 1.99

Banana Chocolate Chunk 430 Cals
Blueberry 430 Cals
Cranberry Orange 360 Cals
Fruit and Cream 390 Cals

PAIRINGS

Baked Muffin \$ 1.49 \$ 1.99
& Small Premium Roast Coffee 300-440 Cals

Baked Muffin \$ 1.49 \$ 1.99
& Small Premium Roast Coffee 300-440 Cals

BAGELS
Ask us about our favorites!

Bagel with Butter 310-330 Cals \$ 1.99
with Small Premium Roast Coffee 330-350 Cals \$ 2.99

Bagel with Cream Cheese 310-350 Cals \$ 2.19
with Small Premium Roast Coffee 330-370 Cals \$ 3.19

McChicken Meal \$ 5.99 \$ 6.99
440 Cals 580-1010 Cals

Spicy Habanero McChicken Meal \$ 5.99 \$ 6.99
440 Cals 580-1010 Cals

BLT Seriously Chicken Meal \$ 5.99 \$ 6.99
440 Cals 580-1010 Cals

McWrap Chicken & Bacon Meal \$ 5.99 \$ 6.99
460-600 Cals 600-1170 Cals

Chicken Caesar Meal \$ 5.99 \$ 6.99
430-570 Cals 570-1140 Cals

Chicken McNuggets with Meal
9 Pieces \$ 5.99 \$ 6.99 290-310 Cals 430-880 Cals
10 Pieces \$ 6.99 \$ 7.99 490-530 Cals 630-1100 Cals

Filet-O-Fish Meal \$ 5.99 \$ 6.99
360 Cals 500-930 Cals

HOT
Latte
French Vanilla Latte
Cappuccino
Americano
Mocha
Doughnut
Hot Chocolate
Espresso
Premium Roast Coffee
Regular | Decaf
Premium Tea

COLD
Iced Coffee 120/170/230 Cals
Real Fruit Smoothie
Randomly Flavored
Flavoring Premium Roast Coffee 110-130 Cals
Regular | Decaf | Premium Tea 130

Meny
Helg & la carte
Lina rätter

Skagenstekt med potatis och citron saås 130kr / Hel 220
Sopagravad sa med Sjömansmat och smör 110kr
Sjömanssuppa 90kr - 95kr hel 150kr

Värmdr:
Tostad med strösocker och potatis 150kr
Äggfärd med smör och potatis 150kr
Bakfärd - Måssås - Broccoli 180kr
Helstekt polpetta - Svanor - Ål - Bryn smör 180kr
Svans kottbullar - Gåsås - Potatis 150kr
Vyg: Lingrya med smetana 120kr

Desert:
Crème Brûlée med smetana 120kr
Chokladkaka med vaniljsås 95kr
Baklava med vaniljsås 45kr
Hemmagjord Chokladryffel 85kr

Med reservation för ändringar
Vi förbehåller oss rätten till ändringar

JOELS BRYGGÅ
LÅSEY

206

DISCUSSION QUESTION

**WHY? AND THAT MATTERS
BECAUSE? AND WHAT
CAN I DO ABOUT IT?**

HOW TO TELL A STORY



Attributed to George M. Cohan

STORIES HAVE

- **A protagonist**
- **An obstacle**
- **A journey to overcome the obstacle**
- **A resolution**

**BUT WHAT'S ALSO
IMPORTANT?
HELPING OTHERS
SHARE YOUR STORY.**

MAKING YOUR STORY SHAREABLE

- **Compelling and authentic**
- **You have to believe it too**
- **Easy to follow**
- **Easy to make their own**
- **Thank your early influencers**

CHANGING AUDIENCES



UNDERSTANDING MOTIVATIONS

Examining Values and Lifestyles Segmentation (VALS)

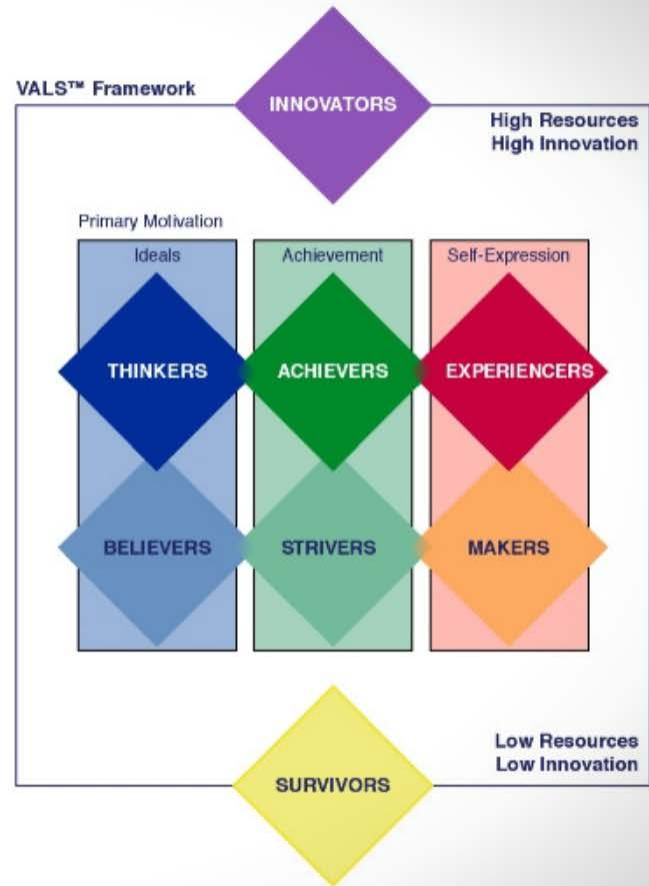


VALUES AND LIFESTYLES SEGMENTATION

US VALS™ Framework



VALUES AND LIFESTYLES SEGMENTATION



PRINCIPLE OR IDEALS



**Strong sense of
right and wrong**

**Values drive
decision making**

“Should”

**What IS good or
right**

STATUS OR ACHIEVEMENT



**Strong role
consciousness**

**Position relative to
peers drives decision
making**

“Have to”

**What LOOKS good or
right**

ACTION OR EMOTION



Relies on “gut feeling”

Emotions drive decision making

“Want”

What FEELS good or right



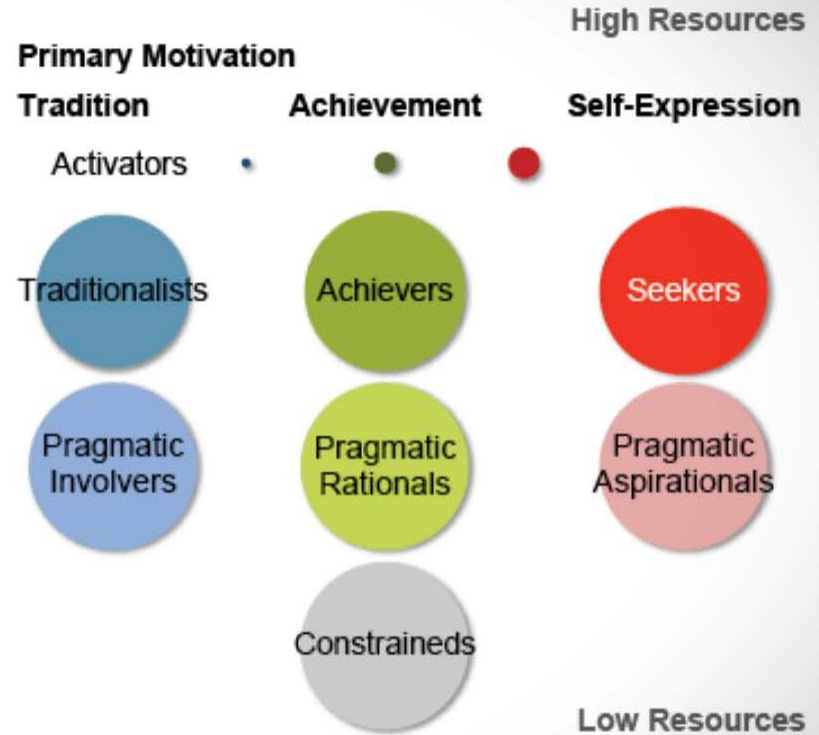
VALUES AND LIFESTYLES SEGMENTATION

China VALS Framework



VALUES AND LIFESTYLES SEGMENTATION

UK VALS Framework



GENERATIONAL GIVING



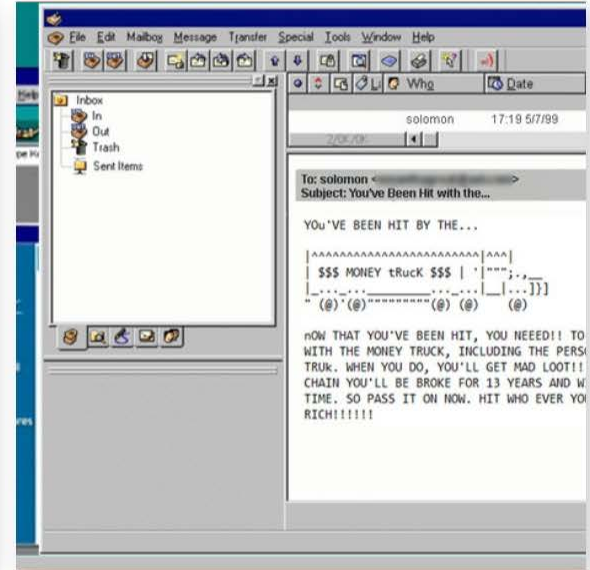
Traditionalists or Matures (born before 1945)

Value consistency and logic
Respond to duty, honor and country



Baby Boomers (born 1946-1964)

Value optimism and personal gratification
Respond to issues around health and personal growth



Generation X (born 1965-1979)

Value thinking globally and balance
Respond to concerns about the environment and civil rights

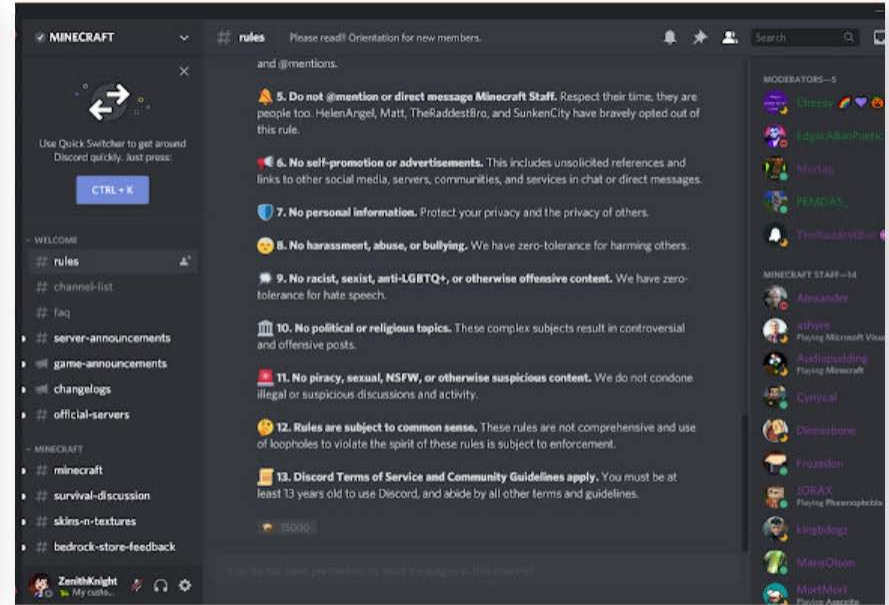
GENERATIONAL GIVING



Millennials (born 1980-1994)

Value confidence and achievement

Respond to messages of personal validation



Generation Z (born 1995-2015)

Value uniqueness and safety

Respond to digital experiences

VALUES AND MOTIVATIONS AROUND MONEY

	VALS	Save or Spend?	Communication
Matures			
Baby Boomers			
Gen X			
Millennials			
Gen Z			

EVERY DONOR NEEDS



Linkage



Ability



Interest

LINKAGE



- Usually already a donor, but not always
- Consistent giving, indicating loyalty
- Or, connected to someone who is a donor

ABILITY



- **Capacity to give**
- **Research can help clarify**
- **Determine right thing, amount and timing**

INTEREST



- **Do they even care about your mission?**
- **Even if they care, do they care enough to help?**
- **Are you one of their top charities?**

**CREATE AN IDEAL
DONOR PROFILE
OR AVATAR**

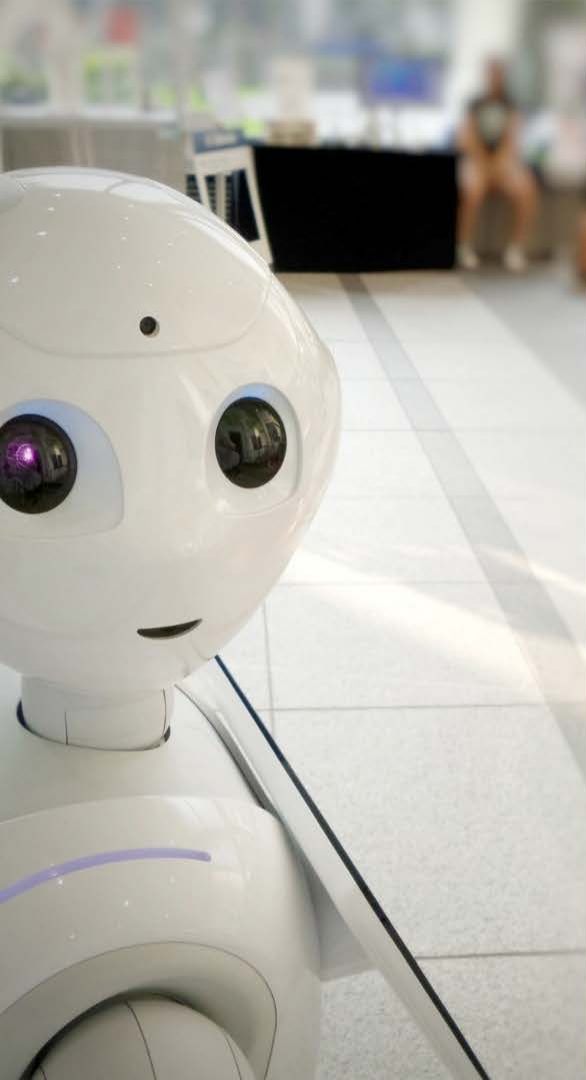
Donor profile



- What's their motivation?
- Gender?
- Capacity?
- Age?
- Family situation?
- Education?



AI TOOLS



"Well qualified intern"

Use it for a first draft



Use to speed up analysis

Prospect research, data parsing, sentiment analysis



Don't assume it's 100% accurate

Check your facts



Consider your boundaries

What won't you use this for?

USES OF AI



Data Analysis

AI tools can help nonprofits analyze data to better understand their donors and target potential donors.



Accelerating Tasks

AI tools can automate mundane tasks, freeing up time for more important fundraising activities.



Personalization

AI tools can help nonprofits personalize their outreach to donors, increasing engagement and donations.

DATA ANALYSIS

- **Predictive modeling for high probability donors**
 - Wealth screening ratings
 - Determination of the "right" gift amount
- **Donor segmentation**
 - Engagement scores
- **Donation forecasting**
- **Fraud detection**
- **Reporting**

ACCELERATING TASKS

- **Writing and editing copy**
 - ChatGPT
 - Grammarly
- **Grant research and writing**
- **Automated receipting**

PERSONALIZATION

- **Live chat with chatbots**
 - Guide the donor through the donation process
- **Personalized email campaigns**
- **Other personalized communications**
 - Changing tone or voice

POTENTIAL RISKS



Data Privacy and Security

Collecting, storing, and processing donor data using AI tools can lead to privacy concerns and potential security breaches.



Reduced Human Input

While AI can streamline many tasks, overreliance on automation can lead to a loss of personal touch in donor interactions.



Ethical Issues

AI can generate persuasive content, such as personalized emails, social media posts, or even deepfake videos.

DATA PRIVACY AND SECURITY

- **Collection of data without consent**
- **Lack of control over personal information**
- **Cross-border regulatory compliance**

REDUCED HUMAN INPUT

- **Unintentional widening of the digital divide**
- **Lack of emotion**
 - The balance between automated and personal

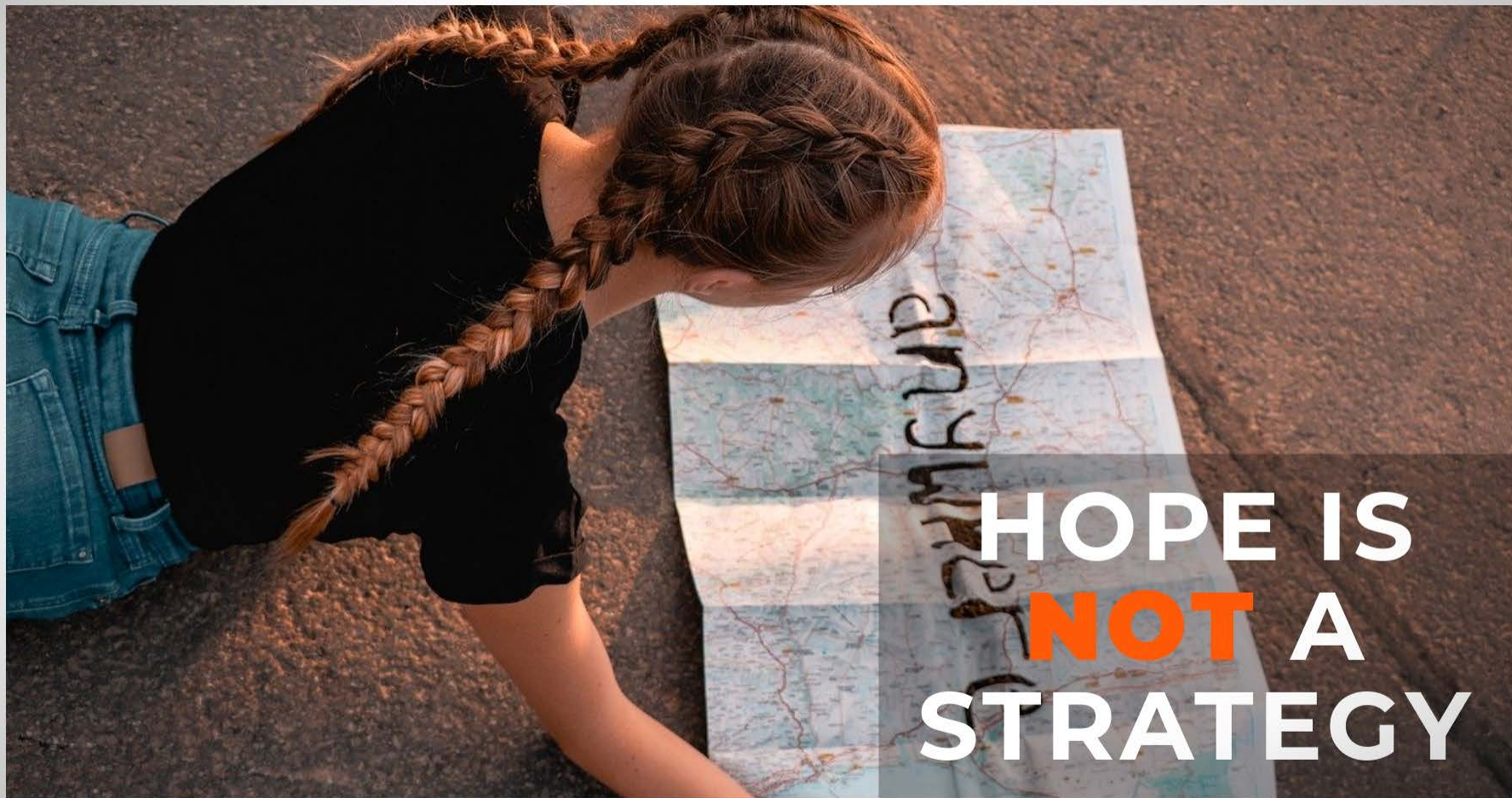
ETHICAL ISSUES

- **Codified bias**
- **Manipulative targeting**
- **Use of AI-generated content**
 - Ownership of derivative content

Part 3

CREATING THE FRAMEWORK FOR A RESILIENT PLAN

WHY PLAN?



HOPE IS
NOT A
STRATEGY



**“PLANS ARE
NOTHING.
PLANNING IS
EVERYTHING.”**

US President Dwight D. Eisenhower (1890-1969)

PLAN ELEMENTS

- **Assessment**
 - SWOT analysis
 - Metrics and benchmarks
- **Vision and goals**
 - Financial
 - Impact
- **Key personas and audiences**
- **Key messages from your case for support**
- **Core strategies and tactics**
- **Timeline**
 - Annual and up to three year plan
 - 12 WeekYear

DETERMINE LONGER TERM VISION



Milestones

WHAT ARE MY MUST DOS?

PRIORITIES

Must Do

Most critical operations

Should Do

**How can we keep things going
the way they are**

Nice to Do

**Moving toward aspirations and
longer term vision**

THE EISENHOWER MATRIX

Urgent and Important

Emergencies
Priority one

Important but not Urgent

Longer-term impact
Often hard to prioritize

Urgent but not Important

Other people's problems
Result of procrastination sometimes

Neither Urgent nor Important

Don't do these!

BRAINSTORMING TACTICS

- **What has worked before?**

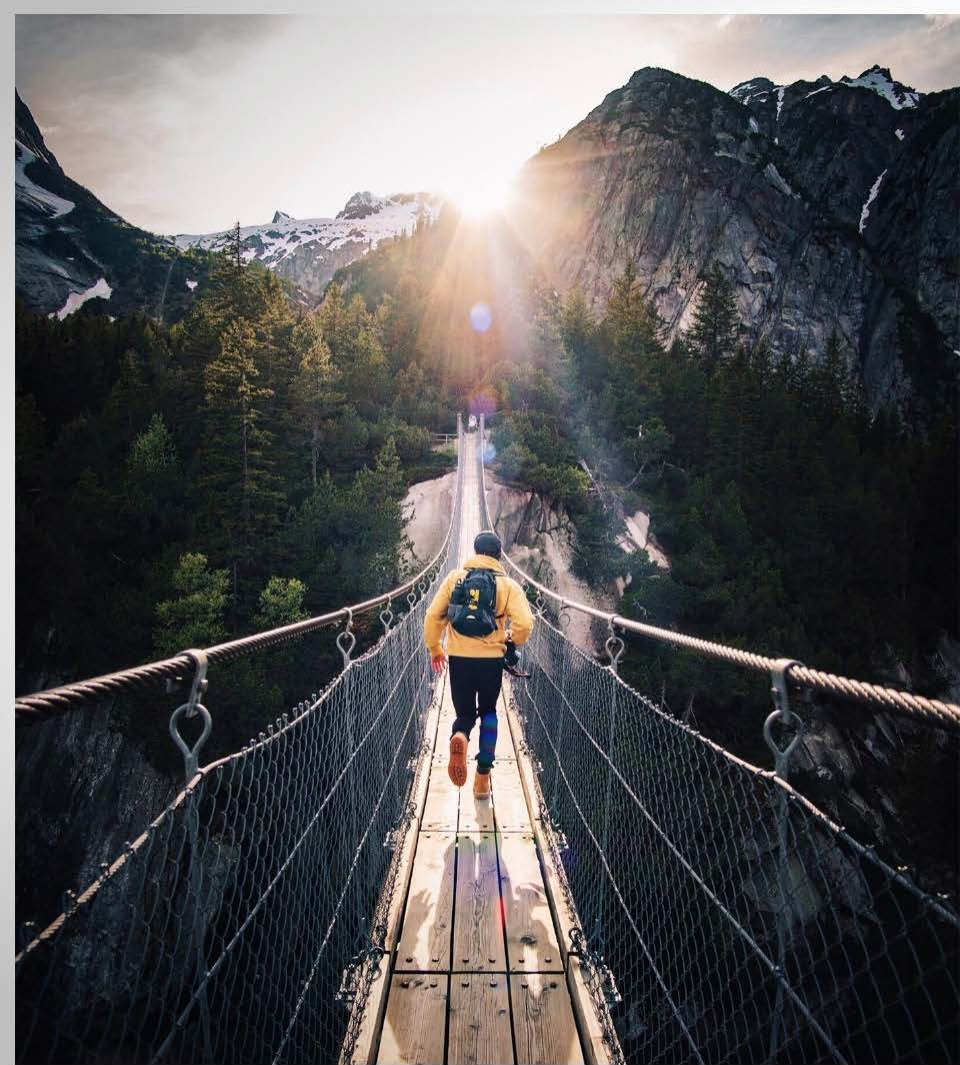
- Intended audience

- Donor persona(s)

- Elements of campaign

- How did you measure success?

- **What might work in the future?**



What's reliable and realistic?
What's a calculated risk?

CHOOSE YOUR TACTICS



FUNDRAISING IDEAS MATRIX

aka the No Pain No Machine

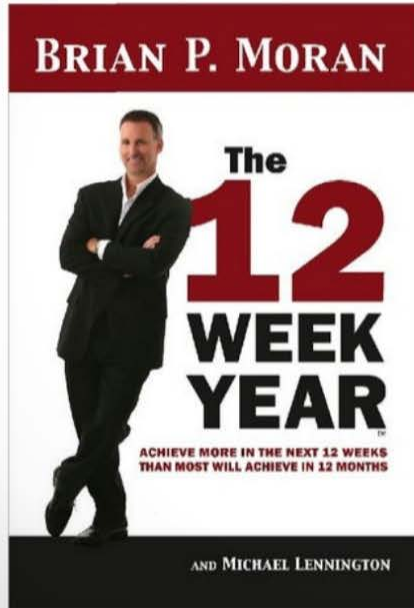
EVALUATION MATRIX

Tactics	Money	Effort	Success	Uniqueness	Mission Match	Total score

Part 4

MAKING YOUR PLAN ACTIONABLE

MAKE IT A ROUTINE



Periodization

You can have a 12-month vision, but implementation is no more than 12 weeks

WHAT ARE BIG ROCK GOALS?



No more than 1-3 that move you toward your vision

Should be things you can complete in 12 weeks

EACH WEEK

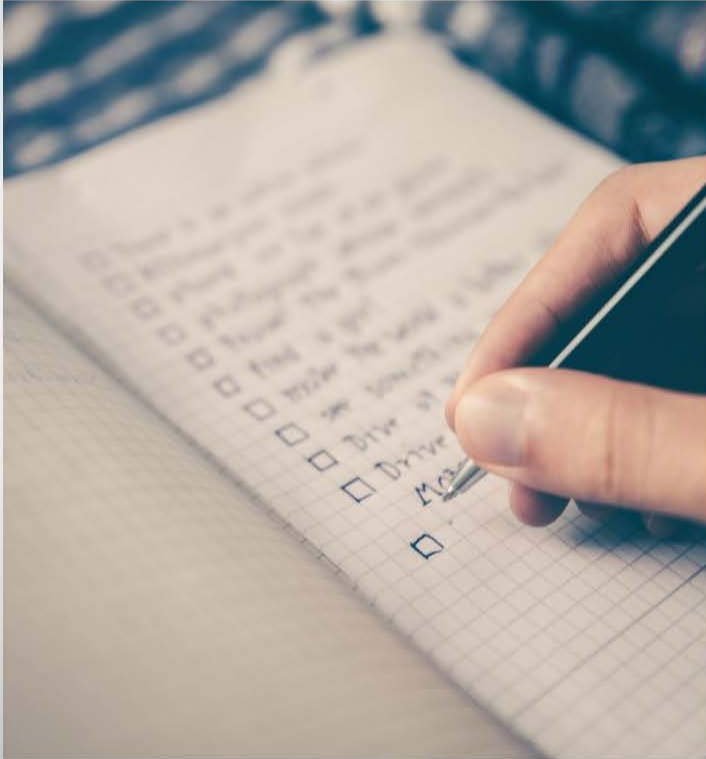


Review 12 Week Year

Pick 1-3 things to work on this week

Break down tactics into things to do this week

EACH DAY



Review Weekly Plan

Pick 1-3 things to work on today

Most Important Tasks, i.e. “Eat Your Frog”

Eat a live frog first thing in the morning and nothing worse will happen to you the rest of the day.

Mark Twain (but probably not)



MONTHLY



“Day of Pain and Suffering”

QUARTERLY



Do another quick assessment

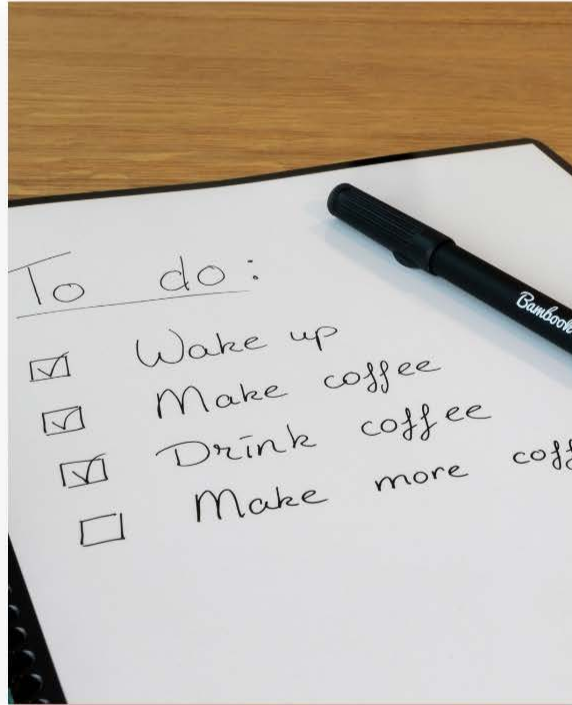
**Reassess “Big Rock” Goals and
rebalance**

Start again

TOOLS FOR YOUR JOURNEY



Calendar



Task Manager



Idea Capture

**“The key to everything
is patience.**

**You get the chicken by
hatching the egg, not
smashing it.”**

Arnold H. Glasow





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