

# Great Fundraising: What Does It Take to Double, Triple or Quaduple Your Income?

Adrian Sargeant PhD  
Adrian@philanthropy-institute.org.uk

Jen Shang PhD  
Jen@philanthropy-institute.org.uk



# Greatness in Fundraising

Defined by 20 sector's leading thinkers  
(directors of fundraising and senior  
fundraising consultants):

They defined greatness in terms of delivering  
substantive growth (double, triple or even  
quadruple fundraising income)

so that the charity climbs dramatically up the  
league table of charities as ranked by voluntary  
income.

It transforms the organization

It transforms the essence of how an organization  
accomplishes its mission.

Sargeant and Shang,  
(2013)



Institute for Sustainable  
Philanthropy

# Greatness in fundraising

This presentation tells you how these organizations did it:

Cancer Research UK

British Red Cross

NSPCC

Save the Children

Royal British Legion

AND Australia, Norway and USA

AND reports on impact of culture and brand



# So Who Were Our Leaders?



“I didn’t wake up one morning and just think ‘I want to be a fundraiser.’ I joined a specific Cause that I feel really passionately about And my way to make a contribution to it is to Raise money and support”

“I’m absolutely in love with and besotted with the Cause ... I do love fundraising, I love the chase, I love the accumulation of wealth in that sense, I like the process.”





# The Level 5 Hierarchy

<b>Level 5</b>	Executive	Builds enduring greatness through a paradoxical combination of personal humility plus professional will
<b>Level 4</b>	Effective Leader	Catalyzes commitment to and vigorous pursuit of a clear and compelling vision; stimulates the group to high performance standards
<b>Level 3</b>	Competent Manager	Organizes people and resources toward the effective and efficient pursuit of predetermined objectives
<b>Level 2</b>	Contributing Team Member	Contributes to the achievement of group objectives; works effectively with others in a group setting
<b>Level 1</b>	Highly Capable Individual	Makes productive contributions through talent, knowledge, skills, and good work habits

Source: Jim Collins



# In Our Study They ...

- Inspire through their confidence
- Make others accountable for their own and team goals
- Create shared mental models
- Create an element of task conflict
- Align organizational metrics with long term goals



# Aligning Metrics ...

- Cash raised
- Number of new donors
- Response rates
- Average gift size
- Immediate return

If the board demand it of their Director, they demand it of their staff, who demand it of their suppliers, who then ...



Governing Boards need to be  
taken out and spanked



# Focus on Drivers of Long Term Value - LTV

- Satisfaction
- Commitment
- Engagement
- Trust
- Identity
- Wellbeing
- Love



The pendulum has swung too far ...



**Beneficiary Needs**

**Donor Needs**

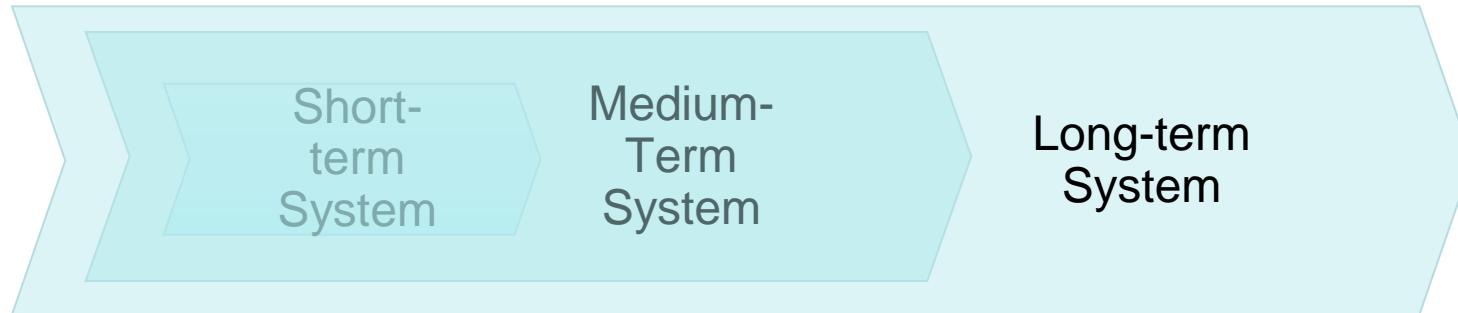


Institute for Sustainable  
**Philanthropy**

# Time Horizon

- What goals do you have for your fundraising? What time horizons are associated with these goals? Represent in a diagram how these goals relate to each other.





Sargeant and Shang,  
(2013)



How do you represent your role as a Fundraising Director or Director of Development?



“50% of your job is about your functional Responsibilities and 50% is about your Responsibility as a director of the organization”

“I spend very little of my time managing the fundraising function. Most is spent managing the organization to allow my Team to do what they do best”



# What Do Our Leaders Do?

Leaders Upward Manage

Leaders Peer manage

Coordinate

Cooperation

Leader build new teams:

building new functional teams for specific forms of fundraising (or relationships)

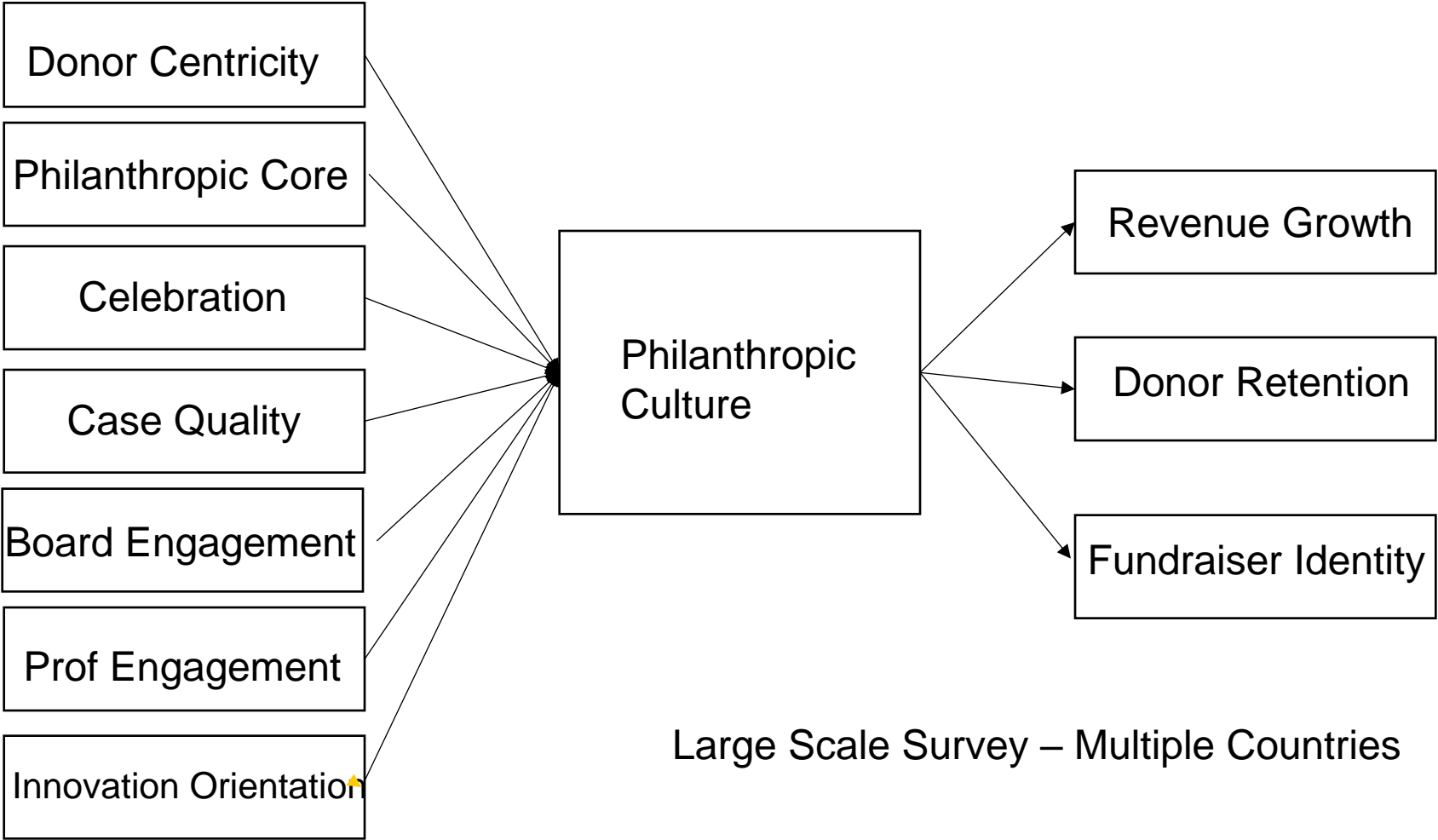
setting up an appropriate reward systems to support outstanding performance



# And Create Great Philanthropic Culture



# A Possible Model



Large Scale Survey – Multiple Countries

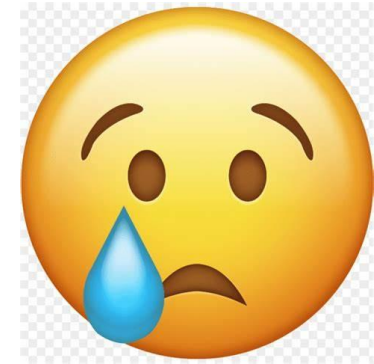
# Donor Centricity – 7 Point Scales

Ingredient	Score
We give close attention to the quality of service we provide our donors	4.47
We regularly survey donors for their feedback and to get to know them.	2.28
When we plan our communications, we deliberately plan for how we will make donors feel when they read them.	4.36
All our publications consistently include celebrations of what the donor has achieved	4.80
We take every possible opportunity to thank donors for their generosity	5.50
We are always seeking opportunities to help our donors become more meaningfully engaged in our organization or cause	4.67
Fundraisers are remunerated for the donor satisfaction and wellbeing they are able to deliver	2.18



# Philanthropic Core

Ingredient	Score
Fundraisers regularly receive information on potential donors from others in the organization.	3.92
Outside of the fundraising team all members of staff in our organization could easily articulate our case for support.	3.47
Philanthropic values are embedded at the core of our organization.	4.02
Organization planning regularly includes consideration of the creation of appropriate gift opportunities.	3.21
The interests and aspirations of our donors ( or potential donors) is a topic regularly discussed by our senior management and/or Board.	3.55
Everyone in my organization understands the key role they can play in supporting our fundraising.	3.48
Everyone in my organization receives training in fundraising and philanthropy.	2.67



# Leadership and Board Are Key

Our Great Fundraising Leaders spent more than 50% of their time making their organization fundraisable



# Misconceptions can be an issue

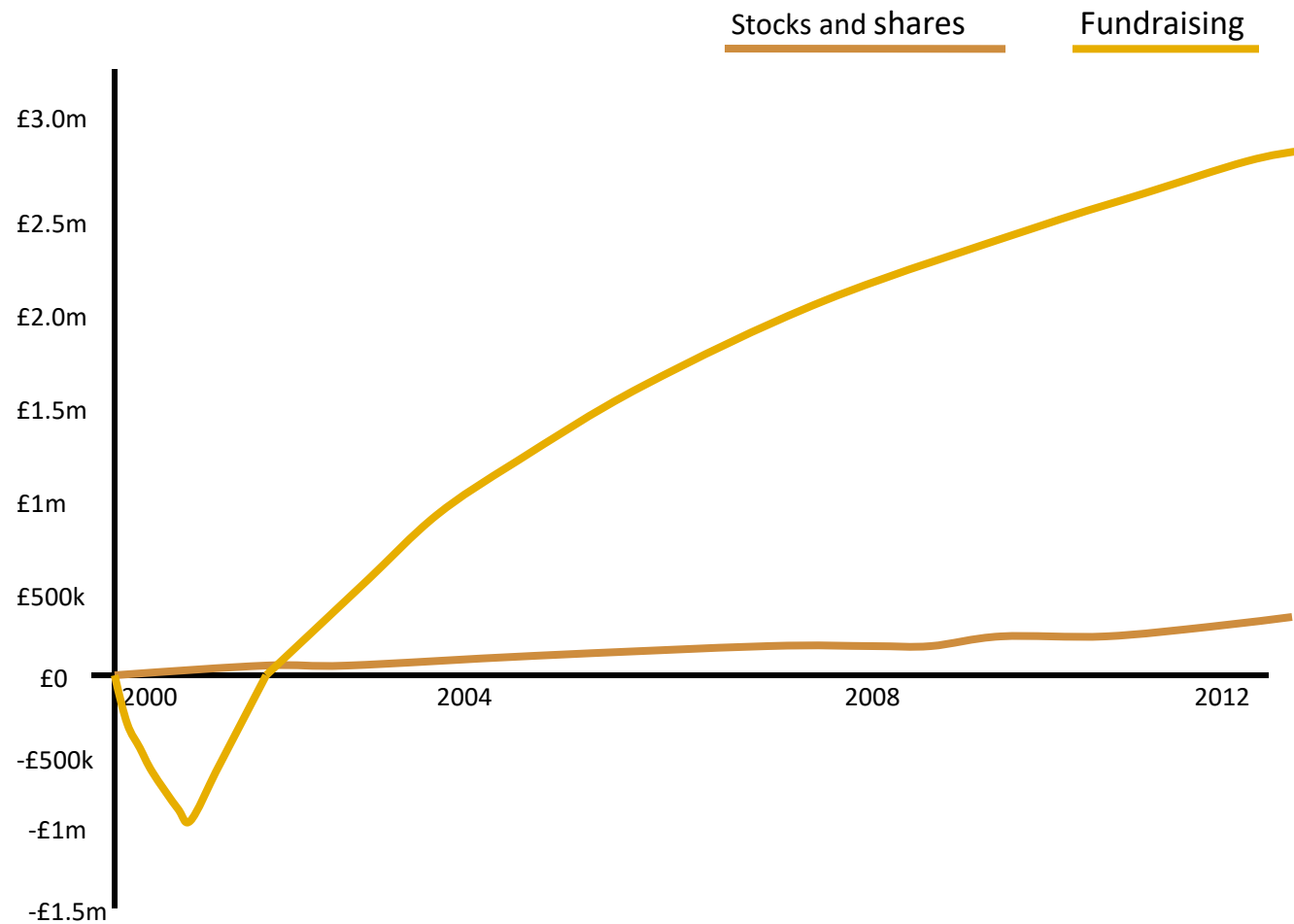
‘When we send out something we get a few complaints or telephone calls. And I think if I send something out I want a few people to complain – but that’s hard for the organization to accept, they don’t like that. There must be an edge to what we do to raise money, but some people won’t like it.’



“Some members of the Board still see us as a cost, not an investment. I need them to look at us through the right lens”

Norwegian Blind Association





Giles Pegram (2010)

*‘I realised that fundraisers are twelve times more effective than my best fund managers.’*



John Stewart  
Chairman, Legal and General  
Chairman, Guide Dogs

# Driving Change

- Inject memes so people always have to remember fundraising, philanthropy AND DONORS

# Memes

- We are a nonprofit and rely on donations.
- Ask on every communication



# Memes

- Fundraising has a sign off on all communications
- Fundraising has a lead role in designing brand guidelines

# Memes

- All staff have a powerful fundraising story and elevator pitch

# Memes

Create a supporter centre



# Memes

- Standard inclusion on Board agenda

# Mememes

- Know where to send a donor, enquiry and complaint

# Memes

- Could we increase the impact and reach of this project by requesting more private supporter money, either from existing resources or by asking fundraising to create a special appeal for this project?

# Memes

- Basic understanding of fundraising in all recruitment, induction and appraisal documentation

# Memes

- Training for everyone !!
- Train the trainers and spread the word

# Celebration of Philanthropy

Ingredient	Score
Outside of the development office, we routinely celebrate the impact of philanthropy	4.18
We celebrate how philanthropy changes the lives of beneficiaries and donors	4..21
Fundraisers in our organization feel valued for what they do	4.51



# Board Engagement

Property	Score
We have a chief executive willing to spend time, energy and resources to make the case for investment in fundraising.	5.50
All our Board members have made meaningful gifts in the past year.	4.20
We make it clear to new Board members on recruitment and during their orientation that they will be expected to make gifts to support the mission.	3.25
We have a process in place for handling Board members who do not make a personally meaningful gift to support the mission.	3.01
In our organization we adopt a long-term perspective on fundraising.	4.70
I have one or more fundraising champions (or advocates) I can rely on, on the Board.	4.65
All members of the Board could clearly articulate our case for support.	3.89
Members of the Board all play a role in facilitating fundraising success.	3.70



# Professional Engagement

Property	Score
Our fundraisers have regular access to professional development opportunities.	5.15
In our organization fundraising is seen as a profession.	5.56
We encourage our fundraisers to take an active role in the profession.	5.22
Every year we survey staff satisfaction, commitment and wellbeing.	3.10
We encourage our fundraisers to attend sector conferences and events.	5.06
All our fundraisers hold some sort of certification to illustrate their professional qualification.	2.23
In my organization, fundraisers who continuously develop themselves professionally are being rewarded	3.98
Our organization provides fundraisers levels of pay and respect commensurate with those of other professions	4.20



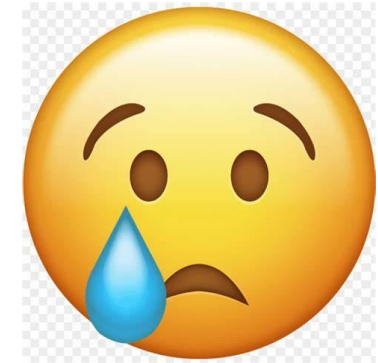
Designed by 123FreeVectors.com



Institute for Sustainable  
Philanthropy

# Innovation Orientation

Property	Score
Innovation is an important part of our organizational culture.	4.46
There is a coherent set of innovation goals and objectives that have been articulated for fundraising.	3.72
Innovation is a core value in our organization.	4.15
We have continuous initiatives aimed at improving donor satisfaction and wellbeing.	4.11
Our strategic planning process for fundraising is opportunity oriented rather than process oriented.	4.23
We are strongly encouraged to innovate (in our fundraising) by our CEO and Board	3.46



# Case Quality

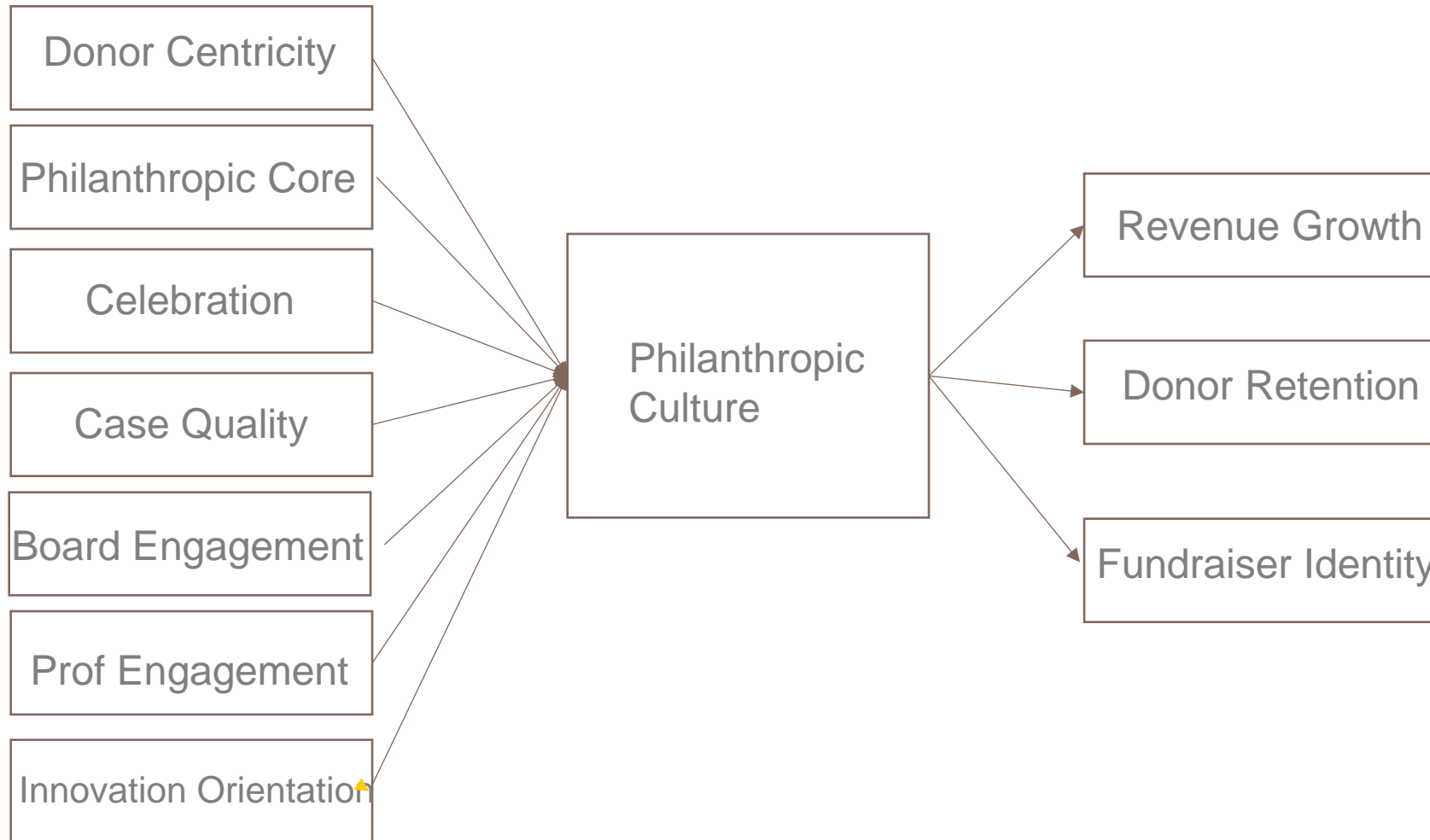
Ingredient	Score
I feel we have strong and compelling case for support	5.34
Our case for support doesn't focus on what we do, it focuses on why we do what we do.	4.83
All staff have a powerful fundraising story and elevator pitch	3.46
Our case for support is unique	4.57
Our overall case for support is deeply emotional	4.57
The program team regularly relate stories of mission success to the fundraising team	4.05
The program team regularly generate ideas for projects that could be the subject of fundraising	3.99
In our organization the fundraising and program teams routinely collaborate	4.46
We regularly review our case for support	4.22



Designed by 123FreeVectors.com



# A Possible Model



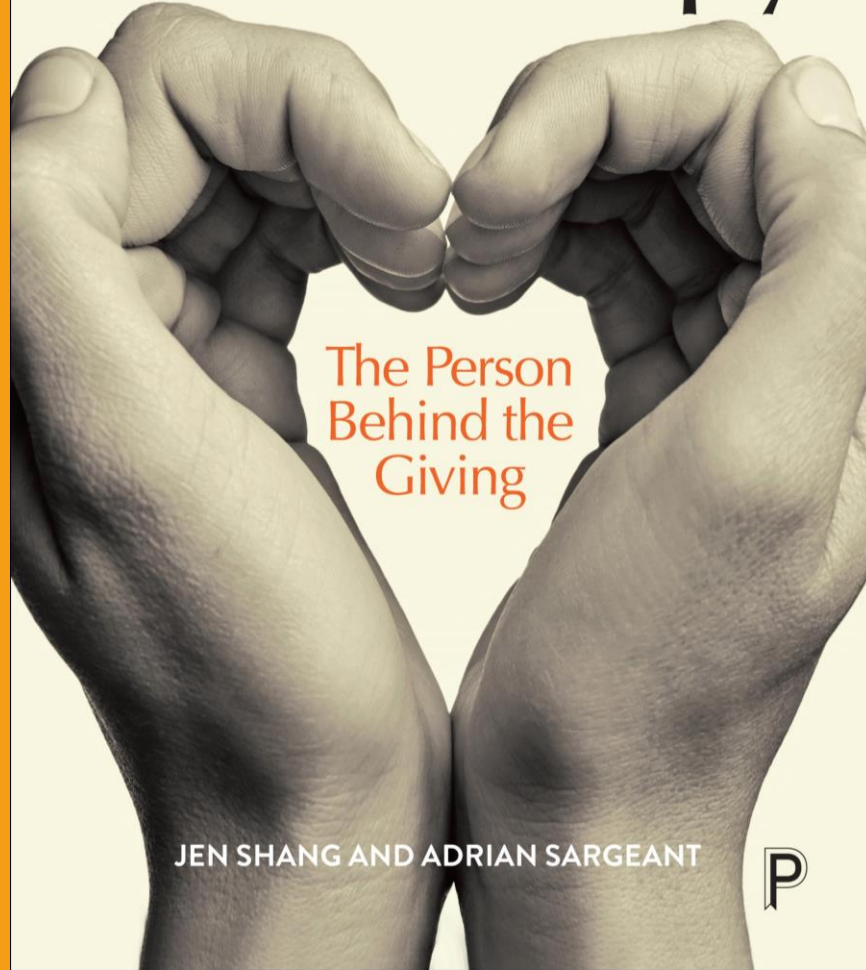
# Does it Predict What It Ought To?

Factor	Retention 1	Retention 2	Revenue Growth	Fundraiser Identity Esteem	Fundraiser Confidence
Donor Centricity	X	X	X	X	X
Philanthropic Core	X	X	X		X
Celebration			X	X	
Case Quality	X	X	X	X	X
Board Engagement		X	X		X
Professional Engagement				X	X
Innovation			X		

Sample of 4500 fundraisers



# Meaningful Philanthropy



The Person  
Behind the  
Giving

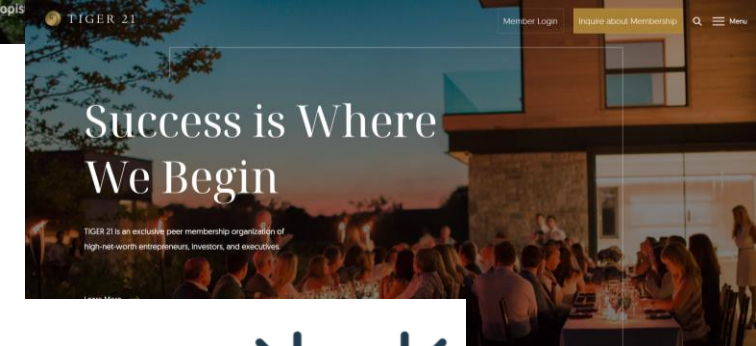
JEN SHANG AND ADRIAN SARGEANT



# We begin by asking

## 48 HNWI and UHNWIs

- Global Philanthropy Circle - Synergos
- TIGER 21
- Generation Pledge
- Founders' Pledge
- Effective Altruism Movement
- AVPN (Asian Venture Philanthropy Network)
- Other private giving circles



## Generation Pledge

A growing community of inheritors committed to doing the **most** good



Founders Pledge

[How it Works](#) [High-Impact Giving](#) [Equity for Impact](#) [Community](#) [Blog](#) [Joining](#) [Sign In](#)

## Finding Solutions. Funding Impact.

EMPOWERING ALTRUISM

We are a global community of entrepreneurs. Together,

The image shows a section of the Effective Altruism website. It features the heading 'Effective altruism is about doing good better' and a sub-heading 'Effective altruism is a research field and practical community that aims to find the best ways to help others, and put them into practice.' Below this is a line graph with the x-axis representing years from 1900 to 2000 and the y-axis representing various metrics. The legend includes: Energy capture (kWh/cap/day), Life expectancy, % not living in extreme poverty, GDP/cap, % living in a democracy, and War-making capacity. A 'Read our intro' button is visible at the bottom left of the graph area.

**Effective Altruism** About Learn Connect Take Action

### Effective altruism is about doing good better

Effective altruism is a research field and practical community that aims to find the best ways to help others, and put them into practice.

Read our intro >>

- Energy capture (kWh/cap/day)
- Life expectancy
- % not living in extreme poverty
- GDP/cap
- % living in a democracy
- War-making capacity

The world is changing in important ways, we can contribute to real progress, but we must also reduce the new risks that come with it. See full version in context.



# Participants

---

Gender

Male: 64%

---

Female: 36%

---

Age

Under 40: 19%

---

41- 59: 25%

---

Over 60: 56%

---

Global reach  
across 10 time  
zones and 5  
continents

America: 40% (19 people from USA, Canada, and Brazil)

---

Europe: 35% (17 people from UK, Netherlands, and Sweden)

---

APAC: 15% (7 people from Singapore, Australia, and South Korea)

---

MENA: 10% (5 from Jordan, and Qatar)

---



A scenic landscape featuring a winding asphalt road that curves through a valley. In the background, there is a large, calm lake reflecting the sky, and a range of rugged, snow-capped mountains under a clear sky. The foreground shows dry, golden-brown grass and some evergreen trees.

**How do they sustain their journey and its chosen direction?**

**How do they set the direction of their philanthropic journey?**

**Where do they start?**

# Meaning is not impact

*“My parents had food at home so I wasn't stunted. Now there are 160 million children stunted because they don't get enough nutrition in the first 1,000 days.”*

- P10



# Meaningfulness is a choice

The amount of significance something holds for an individual

- What we do matters
- Our lives matter

*“Obviously it's always where you grow up...*

*you get some values that drive you, that guide you on your purpose, **if you want them to.**”*

- P10



# People take ownership

This is my way, and it may be different from others

<b>Psychological Ownership</b>  <i>(the state in which individuals feel as though the target of ownership (material or immaterial in nature) or a piece of it, is “theirs”)</i>	<b>Domain</b>  <i>(the domain in which they choose to build their business, real estate, accounting, financial services, health care, hospitality)</i>
	<b>Process</b>  <i>(The method they use to engage in building up their business and managing their performances)</i>



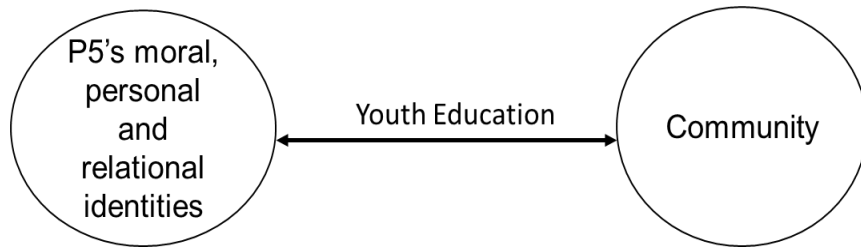


# Psychological Ownership

	<b>Process</b>	
<b>Domain</b>	Yes, Yes	Yes, No
	No, Yes	No, No

# P5's Story

## The initial intent



*“The original intention was actually a simple thing. **The community** believes in education, and they wanted to send their kids to universities. But they couldn't afford it.*

*That sense of community, that sense of problem solving, that sense of initiative...”*



# Philanthropic choices may be experienced as moral convictions or non-moral preferences

		<b>Moral Conviction</b> <i>(the attitudes that people perceive as grounded in a fundamental distinction between right and wrong)</i>	
		Yes	No (Non-Moral Preferences)
<b>Ownership</b>	<b>Domain</b>		
	<b>Process</b>		

# Philanthropic choices may be experienced as moral convictions or non-moral preferences

		<b>Moral Conviction</b> <i>(the attitudes that people perceive as grounded in a fundamental distinction between right and wrong)</i>	
		Yes	No (Non-Moral Preferences)
<b>Ownership</b>	<b>Domain</b>	The choice of some domains are inherently less moral than the choice of others (e.g. performing arts over poverty; kids in one's own community over kids in a less wealthy country where the same currency unit can help more people).	<ul style="list-style-type: none"> <li>I have a soft spot for children.</li> <li>I have always been a nature person.</li> <li>I have focused my businesses and my philanthropy on renewable energy.</li> </ul>
	<b>Process</b>	<ul style="list-style-type: none"> <li>Every board they serve on must provide them with some learning opportunities that they deem beneficial to them.</li> </ul>	<ul style="list-style-type: none"> <li>This is my philanthropy, I can <b>only</b> do it the way that it works for me. Other people may prefer to do it differently, but they are not me.</li> <li>I have given it my all, there is nothing else I can do.</li> </ul>

A photograph of two small birds perched on a dark, bare branch. The background is a soft, glowing sunset or sunrise, with a gradient from dark blue at the top to a warm orange and yellow near the horizon. The birds are silhouetted against the bright light, and their forms are clearly visible. The overall mood is serene and contemplative.

*I've always been someone who likes nature (P6)*

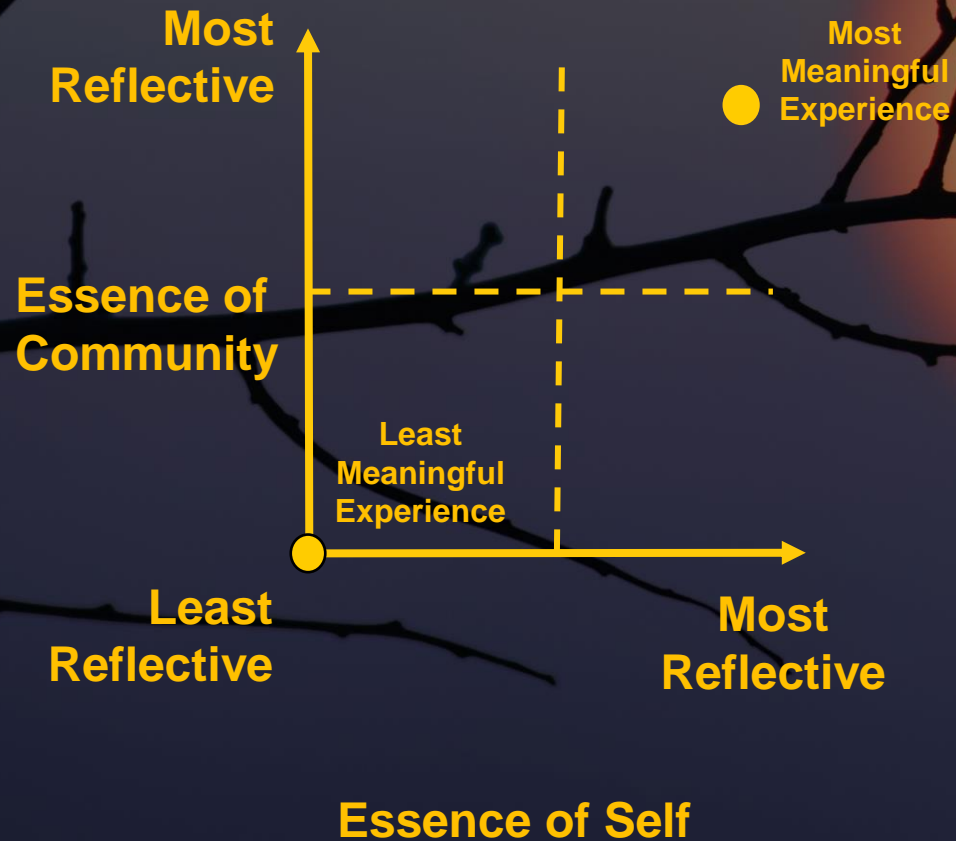
*"It's not a particular moment of opening the eyes to nature.*

*I was just born into it basically."*

*"The day we sold the company and realised the money we were going to get, that memory is fading.*

*But this thing with the bird is staying. It's still vivid."*

# *I've always been someone who likes nature (P6)*



*“It’s not a particular moment of opening the eyes to nature.*

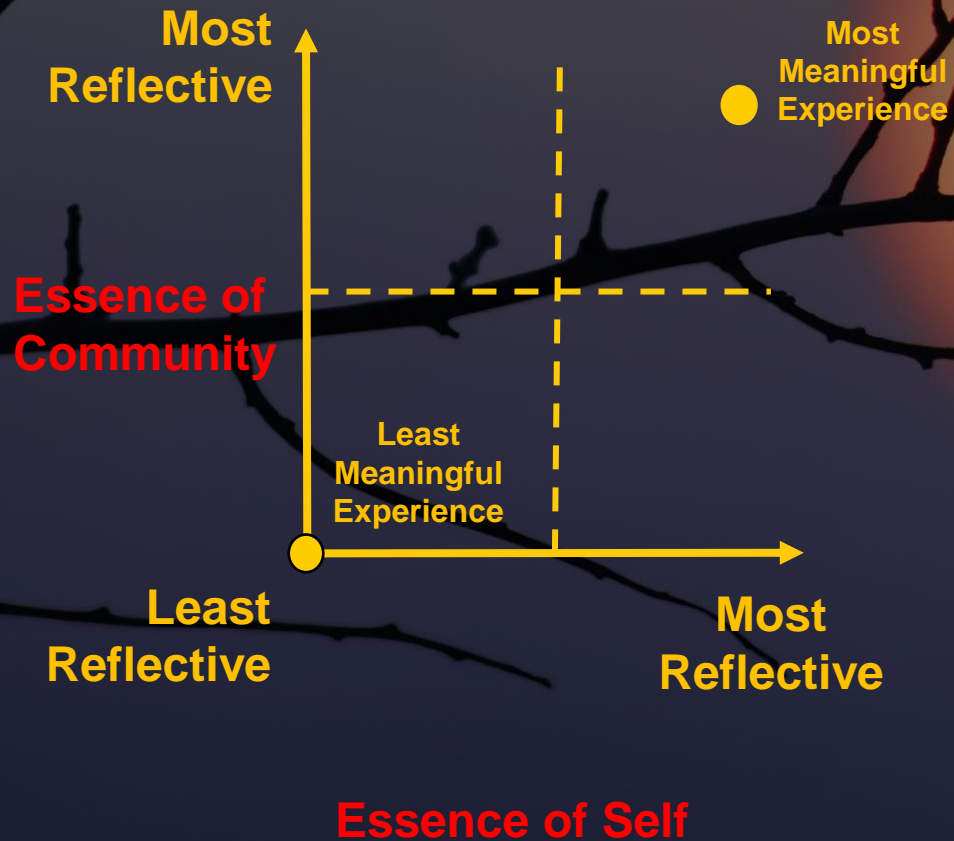
*I was just born into it basically.”*

*“The day we sold the company and realised the money we were going to get, that memory is fading.*

*But this thing with the bird is staying. It’s still vivid.”*

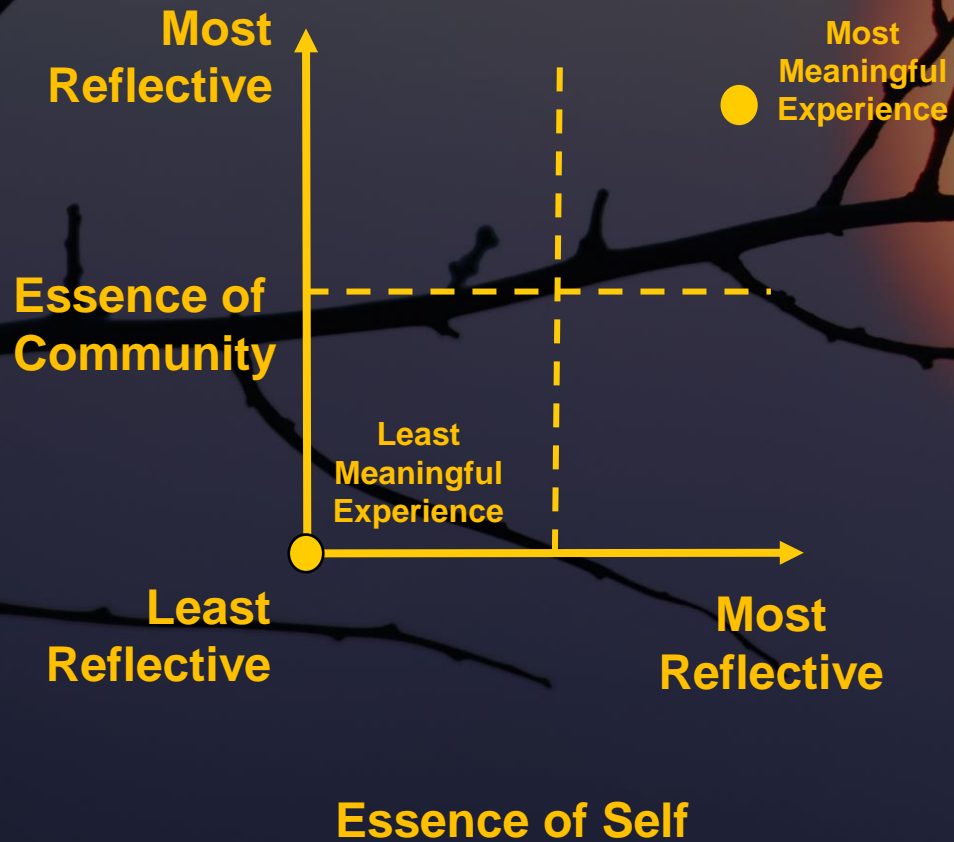
# *I thought I was going to view wildlife (P6)*

But I came away with a completely overwhelming people experience



# *I thought I was going to view wildlife (P6)*

But I came away with a completely overwhelming people experience



*"You may fight an uphill battle but, for me, who am I, if I don't do it."*

- P6

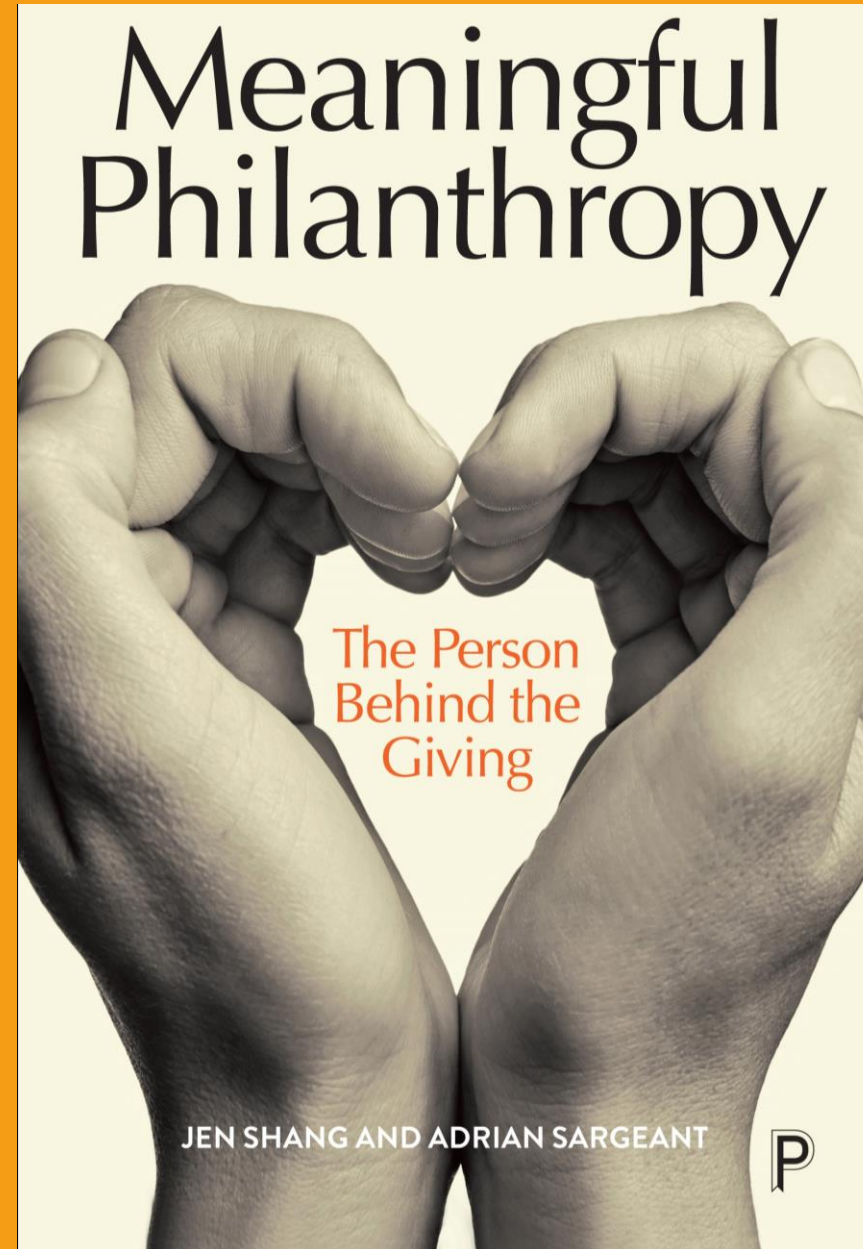
# Own the Knowledge and Conviction of Their Essential Self sets Their Path

		<b>Essential Self</b> <i>(the knowledge and firm belief about who they truly are, are born to be, or are meant to be, people's life's imperatives)</i>
<b>Ownership</b>	<b>Domain</b>	
	<b>Process</b>	

# Own the Knowledge and Conviction of Their Essential Self sets Their Path

		<b>Essential Self</b> <i>(the knowledge and firm belief about who they truly are, are born to be, or are meant to be, people's life's imperatives)</i>			
		<b>Yes</b> <i>(This <b>is</b> part of my life's imperative.)</i>		<b>No</b> <i>(This is <b>not</b> part of my life's imperative)</i>	
		Moral Convictions	Non-moral preferences	Moral Convictions	Non-moral preferences
<b>Ownership</b>	<b>Domain</b>	Business <b>and/or</b> Philanthropy, neither			
	<b>Process</b>				

**Welcome to  
your world of**



# Upcoming Certificate courses

- Certificate in Philanthropic Psychology
  - 6 January 2025 - £1664 plus VAT
- Certificate in Fundraising Copywriting
  - 27 January 2025 - £1664 plus VAT
- Certificate in Legacy Fundraising
  - 17 March 2025 - £1316 plus VAT



# Certificate Courses

[www.philanthropy-institute.org.uk/fundraising-courses](http://www.philanthropy-institute.org.uk/fundraising-courses)



# Sign up for our newsletter

[www.philanthropy-institute.org.uk](http://www.philanthropy-institute.org.uk)

