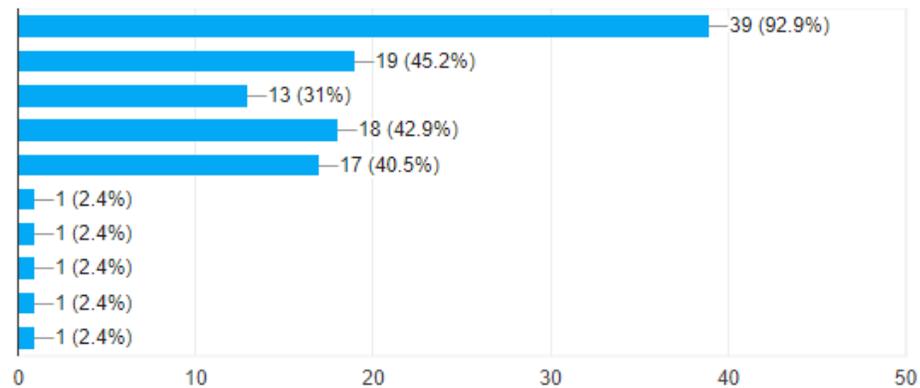


## 4/11/18 Breaking Down Barriers to Fundraising Success: Pre-Workshop Survey

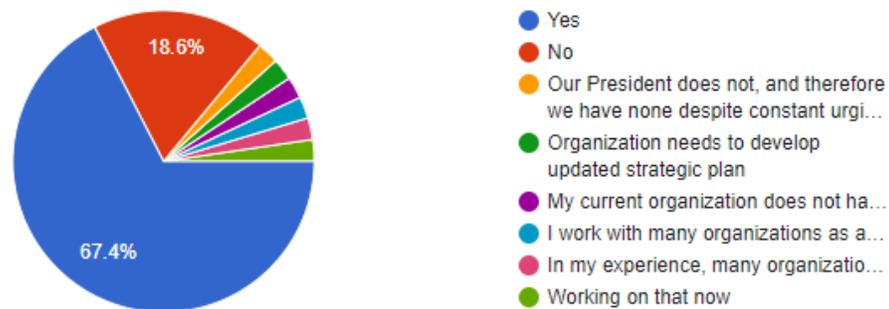
What role or roles have you served in for nonprofit organizations? Check all that apply.

42 responses



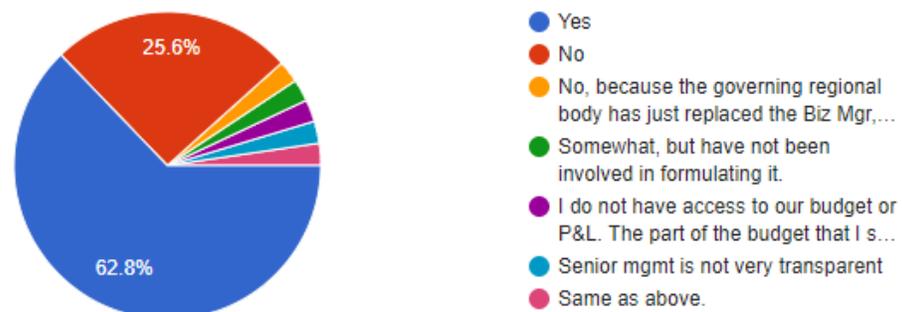
Do you have a clear understanding of your organization's strategic plan and vision?

43 responses



Do you have a clear understanding of your organization's financial plan and budget?

43 responses



## Have you experienced concerns about transparency of information shared from leadership to staff and donors? If so, how? 38 responses

No (15)
yes, sometimes not clearly communicated
There is a clear and challenging disconnect between how leadership, program and finance understand the role of Development and our relationship with Donors.
Inability to quantify to donors how their donations are being used.
Interested in know what is the standard for sharing information with staff and donors. How much do they need to know?
Yes. I think organizations (mine included) too often make decisions behind closed doors, and don't see the importance of sharing that responsibility/power with staff at lower levels. In my experience, this is sometimes done for reasons of control, sometimes because it's easier, and sometimes a combination.
Yes. Strategic plan not being shared for discussion and input
Yes. There have been many times when leadership at organizations I have worked with have chosen to withhold information from staff and donors. Most of the time the concern I experience stems from accompanying lack of accountability, as well as an erosion of trust. Staff especially know when information is being withheld, and without transparency they are left to their own devices to determine why, and what they are missing. Donors may not know, but trust is still eroded as many times withheld information comes out in some way, or later, and they are not happy to be "last to know."
Yes, in my current job particularly. There is outright dishonesty as well as avoidance of clear communications. This is verbal and in writing, and it is both with individual conversations and at full staff meetings. It is a long-term situation that has been going on for years, I later realized. They tell so many different versions of their "truth" that they opposing stories repeatedly. The board members' messaging is also grossly inconsistent with each other and with the chief executive. This is the weakest (and most frightening) governance structure I have experienced. I would categorize the board and chief executive as a club, not a governing or leadership team. I skate on the edge of whether fundraising for this group compromises my ethics.
Yes. Lying about money needed and how much raised and using restricted funds.
The organization has to express need of some type to solicit charitable gifts. Sometimes a CEO is hesitant to express much need, seeing it as weakness.
no, however, we're trying to tell our story better
Communication from volunteers including board leadership can always be challenging. It's not so much a transparency issue as it is keeping everyone informed.
Yes, transparency seems to be a word that is used for discussion but details are not provided unless you are part of the inner circle
No, as ED I am very focused on transparency between myself and the board.
I many instances, the not for profit is ill equipped to provide clear financial objective to donors nor do they provide detail on how donations are utilized.
yes
<b>OUR MINISTRIES ARE MANY AND NOT WELL DOCUMENTED</b>
in a large org. like mine, as a lead fundraiser I could ALWAYS use more details on cash flow, net gain on events, things that donors ask about and that should not, in my opinion, be a big secret.
Unreliability of business manager and reports produced
Our budget is not granular enough to be useful to department heads. Most department heads are cut out of the process. Staff does not have enough buy-in into our financials, so their work does not relate strongly enough to how they are responsible for revenue and expenses. I believe it not only has a bottom line impact but is also a lost opportunity for staff development. In addition, our budget seems to me to be more of an exercise for the board and something to show funders rather than relating to an operational plan. Also, there is constant evidence that our business manager is under-skilled, and even negligent. A serious example is that an embezzlement occurred, and although the direct culprit was fired, there was no consequence for the bookkeeper/business manager who did not notice it for a period of over ten years. Another example is that financial information requested by the development department for grant reporting is always full of errors.
Yes, lack of full transparency from ED to board

## What barriers and obstacles to fundraising success in your role(s) have you experienced? 43 responses

internal communication, too many silos, no clear plan shared with the entire team, management
Program people not being willing to spend time sharing their program successes so we can help promote the work that is done in the community
Biggest barrier is unrealistic expectations and executive director/board hesitation about the donor solicitation/engagement process.
Unrealistic goals set by executives
The agency does not understand Development or respect our work.
A culture that does not embrace fundraising, marketing, communications, or branding. A board that doesn't have any business acumen, and doesn't think it's their role to raise funds.
My Board does not follow through on requests to help with stewardship of donors, providing names of potential donors and facilitating introductions and meetings with potential or current donors
CRM expertise and administrative functions
Not enough time and opportunity to network
I find it challenging to get colleagues who need the funding to be a partner in the process. I recognize the time constraints, but am often surprised at how difficult it is to get them to come to the table in a meaningful way.
No clear budget for our dept and development hampered by outdated website
Board resistant to making personal fundraising efforts, reluctance to try something new, lack of understanding among stakeholders of larger goals
No fundraising budget, in particular, for stewardship and retention, nor for new acquisitions.
Need for mentoring/coaching on running a strategic major gifts program.
Have had to play multiple roles in organization, limiting focus on critical fundraising efforts.
Primarily a lack of understanding from Board members and Executives, particularly when it comes to transparency and the importance of relationship-building. There is often lip service paid to the idea that an organization has to build relationships, but it is not supported by long-term investment in staff to do so. Time and time again, 1.5-2 years into a fundraising role seems to be the limit of patience when waiting for a quick return. When heaps of money are not flooding in, frustration from the Board and Executive level further paralyzes communication and support for fundraising diminishes even more.
I have also found that lack of investment in program planning has been a big obstacle. Many times, someone has an idea and everyone agrees that it's "so fund-able!" This may be true, but there are a lot of steps that need to take place BEFORE it's true, and most times funders are not interested in a mere idea, just because you tell them "it'll be great, we swear!" As a development professional, a huge amount of my time has been spent on program planning (without being credited as a member of the programming team), building theories of change, budgets, timelines, staffing, content, evaluation strategy, and sustainability plans for a program so that it can be funded. THEN I can apply for funding through institutions or appeal to individuals for their support. I continue to be baffled that Board members and Executives chronically insist on going from Point A to Point \$\$\$ without anything in-between and expect success.
Founder's Syndrome; conflicts of interest with board and executive staff; long history of revolving door fundraising staff; resulting distrust and low morale among co-workers; information silos; no board or ED willing to meet with donors; no willingness to introduce colleagues or friends (including donors and former board members) to the fundraising team; irresponsible spending; repeated delays in implementing programs that funds were raised for; lack of data about our programs and impact; disengaged, mistrustful and highly lapsed former key donors -- and punishment of the fundraisers when donor feedback is shared, even though donors are telling us what they need in order to feel comfortable making a gift (so we disregard these opportunities); unwillingness or inability to make decisions with the result of not being able to implement fundraising proposals; stagnant board resistant to new blood and to changes; behind-the-scenes interference with cultivated donors, causing donor confusion and challenging ability to close gifts; not willing to define what the organization needs and the costs attached to those needs; opposed to planned giving including bequests; comfort with "PTA-type" fundraisers rather than maximizing the ROI of events and efforts; ROI is low or no priority; board rarely includes primary fundraiser in meetings; management requests many reports and proposals but does not respond to them (so they are meaningless); not saying what they really want; insufficient board size

and reluctance to add members; no orientation process for a new board member; outdated bylaws; lack of compliance with their bylaws; damaging database practices and no support for defined steps that would improve data; see donors as ATM machines, culture of distrust and blame. I could go on. Shoot me now.
Senior management and lack of resources.
It just seems easier to rely on program revenue, tuition, fees, etc., fundraising is messy, difficult, and requires a sustained approach. CEOs often don't have the patience or the personality for it.
poor math skills
Having donors/prospects understanding the non-profit status of our organization, and the scope of our work.
Lack of understanding by board (and sometimes staff) about what the job of a fundraiser actually entails.
Inexperience and lack of knowledge
Coordination and collaboration with ED, board
I have to learn the Fundraising business, which I am serious studying as I share with you, and get out there to find Major Gift donors.
Poor communication, low expectations, not enough time to prepare once decisions are made for next steps
There are challenges in getting board members to participate in fundraising.
Absence of a strategic plan or stated goals from the board
Burn out of staff and volunteers
For fundraising to be successful the BOD must have a working understanding of the development process. Most are not
Engaging younger donors, unrestricted gifts that aren't event driven
materials, bandwidth and latitude to build something from the ground up.
<b>LACK OF MAJOR DONORS AND LACK OF LEADERSHIP AND LACK OF SOLID COMMUNICATION AND LACK OF TRANSPARENCY AND BUDGET DEFICIT</b>
lack of knowledge of the IMPACT of gifts. lack of collateral - printed pieces, photos, charts, etc. - to share with donors and prospects. a constant supply is VITAL!
A lack of understanding among staff as to how the process works.
Lack of historic fundraising; gaps in development staffing
Not enough coordination with program and marketing. Not enough participation from Directors. (Yes, we have TWO.) Inability to work productively with a toxic and incompetent business manager.
a lack of understanding or respect for fundraising best practices board members who assume that what they like is what all donors like lack of resources (staff and non-staff) unrealistic goals - let's raise 5% more than last year without changing anything! overemphasis on special events, which actually lose money if you factor in the cost of staff time resistance to change - that's the way we've always done it lack of donor trust
Disengaged, uninformed board regarding how fundraising really works/ not being able to communicate in a way that will help them understand. I believe as fundraisers, it is our job to help them best understand or at the very least to have the confidence in my ability to do my job, and to help by following my lead. it is a partnership - staff and board.
Time, complexity of grant application processes, lack of involvement and understanding of board members in participation in fundraising and cultivation
lack of understanding on the part of the staff and board regarding finances; lack of/only partial board engagement; lack of sufficient follow-up with donors by the organization
Do not have a development person on staff; lack of money to hire someone even as a consultant, there is no secretarial or other support staff at this organization to assist with fundraising efforts. Board of Directors does not do any fundraising.

Please share examples of “red flags” that you are now aware of and that would be helpful for others to consider either during the search process or when serving a nonprofit organization. 35 responses

too many silos, lack of clear communication
Check the 990 on Guidestar - Listed are the top earners in nonprofit, which is helpful to know and study the 990's which will give you a sense of the financial strength of the organization.
Find out the benefits in advance. If they are awful, and you need benefits, don't go work there. Sometimes they don't tell you the benefits until they offer you the job - insist on seeing them earlier than that.
Confirm with the CEO that they are not retiring soon.
Quiz the CEO on how functional the board is and what the development relationships in the past have been with the board.
Go to LinkedIn and put in the organization's name and development director and find out how many people have been there before you and how long they stayed. If there is a high turnover (higher than usual in the field) find out why from the CEO.
Find out what the CEO's expectations are for the development team. Sometimes they can be wildly unrealistic, and is based on only what they need, not on what has been done in the past. Development is a building process. If an organization has not raised much money, and doesn't have enough staff on the development team, you can't go out and raise \$20 million in a year - no matter how much the need is.
Find out how many staff you have and who you are inheriting. Research them to see their experience.
Ask to see a clear job description.
Red flags include: 1) not including development director in budget decisions; 2) raising levels of expected fundraising revenue without thought to strategies to achieve it; 3) lack of enthusiasm of ED or board to donor engagement and the real work of fundraising; 4) short staffing.
High staff turnover
Lack of accountability with regard to how funds/grants are spent and how we say they will be spent to the donor.
Getting and reading the organization's strategic plan; understanding how budgets are created (bottoms up).
Make sure the the expectations for your portfolio are clear and measurable with appropriate infrastructure, marketing and resources to support the activity
Find a way to really understand the culture of an organization. It isn't enough to value the mission, because culture informs your work in every way. Different cultures work for different people—figure out what works for you, and then seek that information in the interview process.
no 5 yr plan, micro management, paralysis or procrastination with decision making
Soft fundraising budget, undereducated, bashful President, lack of "trust" with President (Mine is considered/treated like more of an admin role, yet I do all of the back office, fund raising, special events and grant writing with no assistance.)
Board that doesn't understand its responsibility for fundraising.
Clearly defined roles with proper staffing are necessary to accomplish organization goals without burning out staff.
Any evidence of a lack of transparency--even if seemingly innocuous--tells me that it is not the right environment for me.
When staff, donors, clients, or any other primary constituency indicate a "worship" scenario of the organization leader, I become suspect that it is an ego-driven organization rather than a mission-driven one. (I.e. a leader who can do no wrong, who holds all of the power, who is revered rather than scrutinized).

Long, repetitive, poorly worded job description -- most likely written by someone who does not understand fundraising; written or stated expectation of what % the fundraiser must increase fundraising by without an explanation of how that goal was derived and without an understanding of the time needed to build donor relationships; excuses offered to explain current status of the nonprofit; interim management that have been there for years; uncomfortable body language as well as verbal language when you ask board and management specific questions relating to fundraising supports and readiness; job offer comes through at lower salary than discussed; benefits package turns out to be minimal and expensive; tale-telling about the last development director and how she was a bad fit; obvious staff discomfort with your role in your first days because they didn't know you were joining the team and/or knew that the organization was underfunded; indications from staff about dysfunction at the board and management level during and after onboarding time; management repeatedly sharing plans but not following through (when this becomes an over-riding pattern); warnings from former board members and donors once you are in the position; being told your first week that there will be one or two staff cuts so they can afford you (development person or team); no follow through on internal processes like 3-month reviews; promised raises/bonuses never happen.

No annual report. No employee satisfaction surveys.

If the CEO is a jerk, run. If there is lots of turnover, there is a reason for it. No plan. No vision. I was once with an organization that a group of very hard-working, very visionary, nuns had started. They brought in laypeople in order to raise money. The laypeople eventually became the majority on the board and in a time of financial crisis, voted to make the organization nonsectarian and fire the nun CEO. Then they threw the seven remaining founders off campus. At Christmas. OMG. Firestorm.

When there are too many options for support, this can cause an issue. Also having a very wealthy and philanthropic founder can cause challenges.

Board members who don't want to donate.

Reluctance to share organizational financial info, strategic plan

Watch out for people who want to take your money, and give little in return.

Poor communication, boards not questioning Executive Director on matters of importance

Unclear question. "Serving" in what role?

Absence of a strategic plan, communications strategy, development strategy and the necessary resources to implement

Make sure you have a long enough runway and clear goals and benchmarks on a quarterly basis.

**BUDGET DEFICIT AND NEED FOR UPDATED TECHNOLOGY**

the high and rapid turnover of fundraisers is a great cause for concern. Leadership MUST build a relationship with the development team, acting and speaking with the same voice, building trust amongst themselves AND with donors.

Board role, composition and support

Knowledge of the landscape of area served. Long term planning.

Ask about the budget process. Ask how the annual budget, operational planning, and strategic planning work together, and how senior staff is involved. Ask about the reconciliation process between donor systems and accounting systems. Ask about financial best practices, who is responsible for them and how they are reviewed. Also, if when you start, there is a staff person who constantly disparages your predecessor, and constantly complains about the organization but is unwilling to entertain possible solutions to problems, don't just dismiss it. Address it with executive leadership immediately, and if the issue is not sufficiently addressed, get out. Also, if there are one or two directors who primarily do program and see the executive function as a nuisance rather than a single Executive Director who is dedicated to the executive function, and program directors who are part of the senior team, that's going to be a serious problem. Ask to see the bylaws as well and make sure there are term limits, give get expectations, and clear oversight and hiring/firing power of ED(s).

very long hiring process, vague answers about how the board feels about giving and fundraising

When the board does not have financial obligation to give; when the board meets without the ED; when the ED is micro-managed - these things do not change and one person does not have the capacity to make them change.

None apply to my job but here is a few I've heard about. If a new org, find out if the tax exemption is already approved by the IRS. If a new org, make sure the key players that need to be supportive are really planning to get behind it. Look out for board members with conflict of interest. How long have the board members been serving and how long do they plan to stay.

org not adhering to best practices (financial reporting, D&O insurance, prompt and accurate acknowledgement of donations, etc)

Lack of strategic plan, inadequate funding contracts, total dependence on government grant funding/lack of unrestricted funds/inadequate fundraising, inactive board/lack of clear qualifications and

expectations of board members, inadequate staffing at middle management and support staff level; increasing deficits over consecutive years; late annual audits

## If you've had the opportunity to serve a nonprofit that is highly functional, what are some specific examples of things that made it stand out?<sup>35</sup> responses

A Compatible CEO is KEY. You must be on the same page as the Top Position (CEO, Dean, Executive Director). Spend time getting to know them in the interview. If you don't think they are supportive of fundraising, or have deficient social skills, don't take the job.

A CEO that can make decisions (not by committee) is key.

A nonprofit needs a clear mission and clear goals for success.

Low stable turnover in the organization helps it grow. if you have people leaving all the time, it makes for a chaotic outcome.

CEO must communicate with all staff via newsletter, annual meetings or attending staff meetings annually to keep cohesive communication lines open. Staff always appreciate this.

Having enough well trained staff to implement the goals.

A good involved board chair is also important. They must be supportive of fundraising or you are doomed.

An effective Board chair and CEO are the key relationships for the development person. With those in place, you will be successful.

Find out in Guidestar how much money they raise and look several years back and see what the increase has been.

Having the time to strategize a plan of action for major donors/foundations, and following it ; regular and productive staff meetings; strong administrative support.

Clear goals, clear communication, and a culture of collaboration

Strong communication and a sense of a team between fundraising and program.

The latitude, trust and respect provided to the Senior staff.

Transparency and internal communications are critical. Leadership that seeks a variety of opinions, but is willing to make a decision and own it.

clear goals and objectives; take charge leaders and members

Strong partnership between CEO and Board Chair

The commitment to mission and ability to demonstrate effectiveness. This leads to donor loyalty insuring health of organization.

The closest approximations of a functional non-profit have been small organizations that are extremely mission-driven and maintain a manageable scope. They were not driven by an expectation of exponential growth, but by desire to accomplish the mission. That being said, these are organizations that struggle financially because they are small and not driven toward exponential growth, so the ultimate sustainability is questionable.

Really strong board/executive leadership; fully committed and engaged board of directors; clear processes for board development and board growth; friendly and fun -- they make it fun to serve with them!!!; clear understanding of their mission, who they serve and how they serve; a pipeline of future wants and dreams with clear prioritization and planning; financial oversights to make sure that expenses do not exceed revenue; excellent relationship between board, executive and volunteers; truly know how to show gratitude to all. A healthy organizational culture!

Transparent ceo. Ceo works for you not vice versa. Board works in field rather than only high net asset indivs

Honest, visionary CEO who valued board, volunteers and staff. Regular staff meetings and solid communications. I didn't need to listen to or spend time with the "grapevine" (so necessary with

disfunctional groups!) because actual information was timely and good, so I got more actual work done.
staffing, clear processes
great leadership, transparency, mentoring within the organization
Good communication among all parties. Ability of management to prioritize.
Transparency, board/staff collaboration, care for/care of staff
Communication, clear strategy, clear roles
Smart director who has a good relationship with a smart board director
Developing a board that is supportive of ed. A board with varied skills. Great communication within organization.
Prompt thank you/contact with donors
Understanding and resources allocated for a multi-dimensional approach to building financial resources.
a CEO committed to fundraising. Effective use of agency leaders, both Board and execs, in various development outreach activities. Clear-cut goals for fundraising - both explaining need for and use of "unrestricted" AND the same for targeted appeals.
It was well staffed. Each staff member had a clearly defined role and the workload was well distributed.
Great leadership. Shared work towards goals among all staff.
Long term strategic planning.
Commitment to staff culture backed up with culture scanning, training opportunities, recognition programs, and talent development; senior staff highly involved in annual budget process, routine strategic planning process, annual operational planning process, performance plans and reviews that are specific and measurable; pay related to performance outcomes; excellent internal communications; high emphasis on metrics.
truly valuing the staff (salaries, benefits, professional development) willingness to take risks and innovate, openness to change emphasis on growing existing staff and promoting from within
Autonomy with direction and purpose; ability to work based on my own flow; having my back covered in relation to the board.
Outsourcing professional bookkeeping, accounting, and payroll services if there is not a dedicated function in house is helpful
regular, detailed financial reporting to finance committee and full board; standing committees that meet regularly, with description of activities/expectations and annual goals; finance/audit committee meeting with auditor and full board review and approval of 990s; regular communication between ED and board, regarding the organization's work (beyond board meetings)
Clear vision & strategic plan; Clear expectations, qualifications, and responsibilities of board members; Regularly scheduled Board and staff training; Active board and strong executive team; involvement of stakeholders; strong financials and financial forecasting

How effective are you at influencing others in your organization as to the value of fundraising? What do you think you need to be more effective?<sup>35</sup> responses

more senior management support
I spend a lot of time educating people on fundraising and their role in it, helping to tell stories about the work done. The line staff are all overworked and underpaid and resent anything extra. There have been no raises in years.
Medium
I am powerless in influencing others as to the value of fundraising. Stronger leadership is needed.
Culture doesn't change that easily. Every senior level staff should have a fundraising target, ability to generate volunteers.
clearly not very effective, since my Board does not follow through. I'm not sure what would make me more effective. We even have a former development professional who is on our Advisory Board serving as a liaison to the Board. She is making the same requests and stressing the importance but again with no response

The integration of development and external affairs into the total program of the organization
Very influential when it is made clear what is the goal and if the benefits will be accomplished in the short term
I think every values the financial end result of fundraising, but isn't always a great partner in the process of cultivating, asking, or reporting. Our organization talks a lot about the "culture of philanthropy," but seems to believe that this culture can/will be created by the development department. I need the top leadership to own this process (with guidance and support from our department) or it will never filter down.
somewhat but culture needs to change
Very effective, though the new leadership has assumed that role and does nothing to advance the idea of participating in raising funds. Professional development is key to turning this around.
Buy-in from Board president re: supporting Development staff.
Need greater understanding by board of the need to build infrastructure so development staff and ED can focus on building major donors and fundraising.
Everyone seems to understand the value of fundraising; they just don't want to invest in it. I try to avoid being so reductionist, but really what I need is for nonprofits to put their money where their mouths are and actually INVEST in staff. Not go out and hire a high-priced trophy fundraiser with unreasonable expectations on return, but take the time to hire the right staff, nurture and support them, and pay them well. Offer employment benefits, and GOOD ones, without making it seem like it's a big favor, or that the employee should be grateful for the bare minimum health coverage and a few days off.
If organizations are not willing to invest in development and fundraising professionals, and without the expectation that buckets of money will rain from the sky within six months, there's no other tool that will make a difference to my ability to do this work.
Invest well and support a well-paid, skilled development professional, and if your mission and programs are worthy the investment will pay off well in about three years. (I've yet to meet an organization with that patience for ROI.)
Low effectiveness. (Started strong but completely undermined by chief executive. Staff just wants to survive. Board is loyal to themselves, not to the mission.) I will not be successful here unless the board receives and accepts top-notch outside governance training. Needs include: an approved budget allowing funding of development efforts, transparent information on organization's needs that can be funded, and impact data.
Very. Buy in from top
Most in an organization can see the value of fundraising, but there can be considerable difference of opinion about how to do it. Success is the best "influencer." I have worked with some extraordinary consultants who can get right to the point, make valuable assessments, and point in the right direction. For lack of a better term, what I needed most often were "seismographic" reports: a clear reconciliation of where the organization stood at the moment, what resources were available, and what direction to go. A lot of effort is wasted in fundraising doing things (with thin resources) that seem like a good idea at the time.
I have had some success with this, however, waiting to identify that golden key that will assist with this. Having all levels of staff on board will help, along with the Board and volunteers.
Good culture of philanthropy at current org; must keep talking with program staff about challenges and successes and their role in the process
More experience!
I have been the ED for 8 months and inherited a board that has become used to not doing anything. I am having some success in changing that and contining to work on it. I am leading by example and contining to create opportunities for board members to participate. I am also working on attracting action oriented people to the board and have created new board requirements that include fundraising.
Enthusiasm and energy
Very. The critical piece is a board willing to learn
An understanding of the integration of program and service staff with development and external affairs staff.
I think I'm quite effective, but again, having the collateral to demonstrate IMPACT works for donors AND the leadership who makes the decisions
People at my organization greatly appreciate fundraising and they value the development department's work. However, they completely lack an understanding of the amount of time and effort behind the work. They underestimate the amount of time spent on research, cultivation, and production and they overestimate the odds of successfully requesting funding, regardless of the source.

Much training of staff and leadership now taking place regarding fundraising
I think everyone understands the value, but it is hard to get meaningful participation. I think the key reason is because we are disorganized and constantly putting out fires, chasing deadlines, and just trying to execute program. We need to restructure our staff to serve our current needs in order to operate more efficiently. With our current structure, lack of communication, under-skilled co-workers, and general disorganization, it takes so much effort just to function that there is little room for our team to be involved in development, even though most of them believe in its importance and understand that they should have a role.
I am always surprised at how little the data (cost per dollar raised, largest sources of private philanthropy, etc.) move anyone to understand why it's not a good idea to do lots of events, or think you can fund your whole budget with grants, or that your social media activities are going to generate a stable and sustainable source of revenue. So in short, I need better ways to influence and persuade than just relying on the facts.
Boards seem to equate value of fundraising with a bottom line in \$\$\$. They do not value the process in building the relationship. In what ways can we better communicate that?
Series of 4 different 20 min. webinars for small organization board members to watch or to possibly even be shown at a lunch and learn prior to a board meeting that explains the different kinds of fundraising and their roles.
fairly effective; need larger internal development staff; need more info about organization's use of donor database (raiser's edge) to encourage more pro-active fundraising
I am able to influence others as to the value of fundraising but not at getting them to take ownership of their role and responsibilities in participating in fundraising

Does your organization make education and training an organizational priority for staff, for executive leadership and/or for board members? If so, how? 40 responses

No (7)
No, not a priority
The Board has educational retreats and each board meeting is an education and training session. Staff does not get these opportunities.
Professional development is a nonstarter here.
yes on clinical matters for staff. for ED and Manager of Strategic Initiatives, we have participated in workshops (ADO, etc.) and webinars for fundraising. For the Board, we have the Advisory Board member speak with them at Board meetings
Lack of funding to do so
moderate - very cost focused
For staff yes. For board - no.
Not enough time or resources allocated in this area.
Not explicitly, beyond being open to education and training opportunities.
Very limited funds; they tell the staff they want us to take CE, but want staff to pay themselves and do the programs on personal time. Executives are considered experts not needing additional training or outside supports. The board does not engage in training or education; the board thinks the executives have all the information that they need.
No it doesn't. No professional development allotment of funds.
Yes. And when someone hears about a good idea or plan, we try to see if we can make it work.
yes. Supports continuing education.
Yes. We are urged to go to training, on-line classes and attend secondary education.
Not really
For staff, we get to experience a lot of Webinars online.
It is a high priority for staff because we are very committed to our mission. I have begun implementing training for the board that is worked into each monthly meeting. I also hold several community training each year and encourage board members to attend.
Front line staff that deliver programs are a priority.
modestly

At present mainly informal. More needed.
Yes. Exponent Philanthropy. Conferences
We periodically engage consultants to conduct trainings when specific issues come up, and some senior staff are able to participate in annual conferences related to their work. Executive leadership needs to acknowledge that they need training. We need better on-boarding and training for our board as well, who are pretty much just thrown to the wolves.
there is no budget for professional development
Professional development is valued... as long as budget allows - and there is always at least a modest line for PD
For Staff and execs.
Yes, online and in-person training is widely offered and partaken by staff; some offered to board members too
Education and training is a priority for all of the above however there are very little training funds approved by most of our funders. The board members do not participate in trainings that have been offered to them. We have hired executive team members that have the ability to perform more staff training ne since our training budget is small. After going through several years of cleaning up and rebuilding the organization, the executive leadership has been freed up and is taking advantage of more training opportunities.

## Is your organization moving in a positive direction? If so, what are the signs?<sup>36</sup> responses

Yes, we are raising more money each year. The Board is excellent, and well trained in fundraising. We put a mandatory GIVE level for the Board, and we have recruited new Board members. We are growing very fast, but don't have the internal infrastructure to support the growth, which causes a lot of turnover.
No
Glacial movement.
I hope so, although we had to make budget cuts this past year due to expenses outpacing our fundraising. The agreement to put in the Manager of Strategic Initiatives position (devoted 50% to development and fundraising) was a big move forward. There has been continued resistance to hiring development assistants, associates, etc. even on a part-time basis, which means it all falls on the ED
Real Estate transactions and the creation of a Capital Campaign.
Definitely in a positive direction. Staff is more motivated and participate more in events and at meetings, always looking out for outreach opportunities
Yes, but at a glacial pace. Our CEO acknowledges the change that's needed, but hasn't yet committed to his role in making the change.
yet to be determined
making some positive changes, becoming more responsive and making better notes about prospectives. Building more deliberate prospecting strategies.
It is, because raised revenue continues to increase and we are more effective at marketing/communications and are reaching our constituents more often, and in ways they are using continually.
Yes. Recruiting "new blood" for the board.
In some ways. New board President who understands complexities of managing not for profit and need to build the board will be a big help in moving forward.
It is too early to tell at my current organization, but they hired me so that's a start!
NO! Occasional small steps forward are unsupported and not followed through, and a history of big steps backwards.
Very negative.
Yes. New programs. New board members. There is a critical mass of positivity at meetings that can easily overcome the ever-present naysayers.
New executive director, improved technology
Yes
We should be whole by year's end.

We are moving in a positive direction. We have more members attending meetings and becoming more engaged in the work we are doing. This month we will have a change in board leadership, which is a very positive change for us.
In some ways; not in others
Good funding sources due to new employee dedicated to that role.
Acknowledging the need of multiple funding streams to have the most control over your budget.
QUESTIONABLE
YES - I think I'm helping move my org. in a more professional and effective fundraising track. I'm helping COMPLETE certain appeals and demonstrating effective use of donations.
Updated 5 year plan. New programs to attract clients and donors.
Yes. New grantees. Capacity building. Using our knowledge of the county to help grantees.
Yes. We used to not even have staff meetings or performance reviews at all. Now we have those routinely, however, they are not as effective as they could be because leadership has never really had a good model for how to conduct them. There are ineffective, under-skilled, unproductive staff members in key positions who need to depart. In one case, our leadership is aware, and the plan is "she will retire soon." In other cases, there is a lack of understanding from executive leadership of the seriousness of the issue, and a lack of power from board leadership to address the issue, even though they do understand it. There seems to be some growing understanding that the situation is unsustainable.
yes, but excruciatingly slowly
Yes - strategically looking at the future with less government funding
Yes.
Yes. Nearing successful completion of first-ever capital campaign (organization is about 30 years old), growing the board, undertaking strategic planning work later this year, beginning to have board/major donors host smaller cultivation events
We are attracting more knowledgeable and active board members; we have had 4 consecutive years of "clean" audits; the community is beginning to understand and appreciate our value; we have reduced our debt; we have developed a solid fundraising plan; we have developed new strategic partnerships;

## What are some of your favorite resources that you would recommend to others? (Please include web URL's if applicable.)<sup>16</sup> responses

<p>Guidestar for checking out charities  NonProfit Westchester - good resource  Foundation Center - for foundation and corporate research</p>
<p><a href="https://bigducknyc.com/insights">https://bigducknyc.com/insights</a>  <a href="http://www.pamelagrow.com/">http://www.pamelagrow.com/</a>  <a href="https://www.joangarry.com/">https://www.joangarry.com/</a>  <a href="http://sethgodin.typepad.com/">http://sethgodin.typepad.com/</a>  WildWomanFundraising.com</p>
<p><a href="http://sofii.org/">http://sofii.org/</a> ; <a href="https://capitalcampaignmasters.com/">https://capitalcampaignmasters.com/</a>  www.amyeisenstein.com (blog and resources);  <a href="https://veritusgroup.com">https://veritusgroup.com</a> (blog and white papers);  <a href="https://www.nextafter.com">https://www.nextafter.com</a> (blog and resources);  <a href="http://www.engineofimpact.org">http://www.engineofimpact.org</a>;  <a href="http://www.nonprofitpro.com/newsletters/">http://www.nonprofitpro.com/newsletters/</a> (newsletter);  <a href="http://nonprofitaf.com">http://nonprofitaf.com</a> (humor);  <a href="https://www.councilofnonprofits.org">https://www.councilofnonprofits.org</a>;  <a href="https://boardsource.org">https://boardsource.org</a>;  <a href="https://www.bridgespan.org/insights/library/boards/nonprofit-board-resource-center">https://www.bridgespan.org/insights/library/boards/nonprofit-board-resource-center</a> (library, blog and newsletter);  <a href="https://www.centerfornonprofitexcellence.org/resources/board-development">https://www.centerfornonprofitexcellence.org/resources/board-development</a>;  <a href="http://www.nycon.org">http://www.nycon.org</a>  www.adoonline.org (network and workshops)  <a href="http://www.afpnet.org/">http://www.afpnet.org/</a>  <a href="https://www.probonopartner.org/">https://www.probonopartner.org/</a></p>

My favorite is <a href="https://www.bridgespan.org/">https://www.bridgespan.org/</a>
joangarry.com; afp; classy; network for good; blackbaud
Good way to start training people on what fundraising is all about is Linda Lysakowsk's "Fundraising for the Genius." Horrible title, but good webinar.
I will get back to you; my mind is a blank.
Most of my resources are very specific to our field of drug and alcohol prevention. We are branching out into suicide prevention, human trafficking prevention, and mental health awareness.
Joan Garry; The Resourceful Manager; SmartBrief on Leadership
Amy Eisenstein, Joan Garry, Mary Cahalane, Mazarine Treyz, Gail Perry, The Agitator, Veritus Group, Joe Garecht, Claire Axelrod, Sandy Rees, Pamela Grow, Andrea Kihlstedt
Grant Station. Foundation Center, AFP
The United Way, NYS OTDA/HHAP, NYS DOH All of these organizations have training opportunities for Board members, Executive Leadership, and staff at minimal cost. They also have forums where you come in contact with and learn from your peers and other experts relevant to our organization growth and development.

## BONUS QUESTION: What was not covered in this survey that should have been asked? <sup>13 responses</sup>

How will nonprofits survive the federal funding cuts (that is a whole other topic for a session).
the ramp up time for a new development operation and appropriate expectations for measured success each quarter.
What was one of the greatest lessons you learned from a successful fundraising effort? A lesson from a failed fundraising effort?
What is your honest WHY -- what drives you to work in the nonprofit community? What are your career plans, hopes and expectations in the future?; What do you really need from your job to make it rewarding?; Would you recommend a nonprofit fundraising career to others, and why or why not?
Internal vs. external barriers
Did you ever create (or add a significant component) to a really successful fundraising program? What made it work?
finding ways to get in front of current donors/members to tell them more about an organization - how to get them to return your calls/emails
I don't know; it is your survey. Did you get what you wanted???
Survey is too vague and general
The importance of the Funder and grantee relationship.
Staff turnover is high in my organization, driven, in part, by the low salary and heavy workload. I'd be interested to hear ways to improve staff turnover in nonprofits.
Staffing - enough assistance so development person does not have too many work hours to get job done properly.
How do you get support for managing up without insulting your boss(es)? Is there a discreet way for a department head to get support in developing skills to influence their superiors to care about and implement better practices?