



Moves & Management

January 2011

Last Call! Stewardship Podcast

We'll be posting a
new podcast
- our promised travel
episode -
next week...

so if you haven't had
a chance to listen to
the Stewardship
Episode, now is your
chance!

Go to:
[The Osborne Group](#)
and scroll down to
Information You Can
Use

Looking for more on financial fitness?

We'll be returning to
discuss this topic in an
upcoming podcast...

Watch for our episode on:

- Where things fall apart on the road to financial fitness
- What works best

Get Fit in 2011 - An "Exercise Plan" for Your Fund-raising by Karen Osborne

Every magazine and newspaper has an article like this: "*Get fit in 2011!*" Some of us have a new eating plan. Others are working on maintaining an exercise regime. Some are finding a better work-life balance - all in the interest of getting more "fit".

How is your fund-raising fitness? Do you have a plan for losing the weight of ineffective or inefficient practices and raising more in 2011? **Here are six tips to put you on the path to fund-raising fitness:**

1. **Crunch the numbers** - January is the month for taking stock. No matter when the fiscal year starts (this month, July, September), the Fall push and end-of-year giving makes January the perfect month to take a hard look at your metrics. If you are a relatively small operation, stick to the basics. **Look at the performance of your Fall and year-end appeals.** Which did well, which did not? *Review your name-by-name your leadership annual fund donor list (\$1,000+ or \$500+).* Who came in as expected? Who has yet to make a pledge? Who came in much lower? **Did your events under-perform?** *Be sure to look at donor retention and upgrades and the performance of the board in terms of giving and successfully asking and closing.*
2. **Parse the numbers** - if you are a more sophisticated operation, go much deeper and broader. Look at retention and upgrades based on your most important giving levels and number of consecutive years of giving. Examine your yes rates (number of solicitations versus closed gifts, amounts given versus amounts requested). Review your name-by-name table of gifts and your high, low, and likely projections.
3. **Make a new plan** - once you've gathered all of your data, revise your plan. Look for opportunities and problem areas. For example, do you have a lot of donors at the \$250 level and too few at \$500? Maybe your donors are stuck at \$1,000 - the entry level to your leadership giving society. Perhaps your retention rates are low, or you're asking high and receiving 25% or less of the requested amount. These facts help you develop strategies for change. Will a board member offer a challenge to match every donor moving from \$1,000 to the next giving level? Are you asking *before* engaging or failing to provide impact reports and thus receiving a fraction of each solicitation? Focus on

- for our clients
- How you can take steps today to a stronger, more balanced portfolio

And, of course, we'll very likely have opinions on some other items in the news...

What we offer...

We partner with you to:

- Develop long-range strategic or campaign plans
- Identify ways to diversify your funding streams and build an implementation plan
- Build strong Board leadership to help steer your organization through rocky times

Or any other aspect of philanthropy, opinion research or organizational management...

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high impact items.

4. **Love your donors** - nothing raises money faster than great stewardship (other than asking for the right amount after engagement - and one leads to the other!). Start with your "Critical Few" and then move down the list. Pick up the phone (get everyone involved) or go visit them. Share the IMPACT their previous investments have made on the people, animals or environment your mission serves. Thank them again. Ask advice. Extend an invitation. Don't ask for money (yet!). Make your donors say "wow."
5. **Get out the door** - fundraising is an in-person endeavor. The more you conduct your business from your desk - sending emails, or snail mail, making phone calls - the less effective your program will be. Look at your calendar for February to June and map out a travel plan (whether it is local, regional, national, or international). Where are your donors, who are the most important? Go see them. A recent survey of *The State of the Non-Profit Sector* found that only 30% of organizations are planning to hold conversations with their funders as a way to increase giving! (70% don't plan to do this?! Egads!) Be part of that 30% who show up and say to donors "You are important, you matter!" Yes, we always need new donors, but strike the right balance of resources spent with current and recently lapsed donors. They should receive far more attention!
6. **Invest in you** - you will be a better fundraising, and a happier one, if you pay attention to those other New Year Resolution stories. Go home on time. Get a good night sleep. Take a walk at lunch. Eat your vegetables and drink lots of water. Go to a conference. Take a class. Visit family and friends. Attend to your spiritual needs. Our donors and missions deserve us at our very best.

Fears About Government Funding

by Robert Osborne, Jr.

The rumblings started last summer and have been growing louder and louder since then. *60 Minutes* recently did a piece, *The Economist* has been talking about this steadily for months, and now the news is slowly creeping into the headlines of newspapers. *The topic I am speaking of is the problem of public debt.* We've all heard about the problem at the national level, but there are also huge problems at the state and municipal levels. Some economists believe the problem could be as large as the housing bubble a few years back.

While we here at The Osborne Group are not economists or prognosticators of things financial, it seems to us that **organizations that are dependent on government funding should start seriously thinking about diversifying their funding base away from government funding.** The dangers of over-dependence on government funding are very similar to the dangers of over-dependence on foundation funding or corporate funding. While each of these sources can provide substantial grants to an organization, they also have a tendency to eventually go away, leaving your organization scrambling. Governments change, priorities change, and economic situations change. And unlike foundations or some corporations, it is especially tough to reach decision makers in government funding to make your case - and even if you

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can, their hands are often tied in terms of how much impact they can make.

It's never too late to begin to strengthen the fiscal health of your organization by diversifying your funding base. Now is good time to take a long hard look at your government funding and what would happen if it went away.

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