The Key to Sustainability: Mission-Based Fundraising

Terry Axelrod and her team have taught the Benevon model of funding to more than 4,000 organizations over 16 years. While it was a solid fundraising method from the start, Axelrod has learned some lessons over the years and tweaked the technique to make it even more effective.

Now she offers us the complete model in her latest book. *The Benevon Model for Sustainable Funding* (benevon.com), designed for small to mid-sized nonprofits, does a comprehensive job of explaining how to use the model.

The most important aspect of the Benevon strategy is that it's mission-focused. Every activity revolves around and contributes to the organization's purpose, and that purpose is relayed clearly and succinctly.

You can see how this model works by looking at your fundraising events. Does every one of these events clarify your organization's mission for participants? If not, those events aren't creating sustainable funding. Axelrod suggests ways to "bless and release" such events or convert them to more mission-focused fundraisers.

She also stresses the importance of gaining organizational buy-in and assembling a good team to manage the model. After all, it may require a major shift in fundraising practice within your organization.

It's not a cookie-cutter method. Flexibility is built in to let you adapt the procedures to your own circumstances. At the same time, the components of the model rely on one another, so the more you stray from the basic steps, the more likely that results will diminish.

Unless your organization is willing to try a new, innovative model of fundraising, this book isn't for you. If your organization — as a team — is willing to make individual giving more sustainable, however, read and share this book throughout your organization. If you already use the Benevon model, this book is an excellent reminder of the value of each tool and the overall model.

A key undertaking in the Benevon model is to hold a Point-of-Entry Event. You can invite anyone and everyone to this free, one-hour event. The point is to inspire them about the work your organization does.

The first part of planning your event is to "choose your buckets." This tactic will help you describe the impact of your programs in a concise, understandable way. To do so, follow these steps:

- **Pretend you have three buckets.** Divide all your programs into one of the three.
- **Name each bucket.** Choose a name that encompasses all the programs inside the bucket.
- **When you add the three bucket names together, you'll have a powerful tag line** that sums up your organization's work for people. Examples of three-bucket names:
  - Nurture the spirit. Educate the mind. Transform the community.
  - Protect, restore, and preserve the environment.
  - Help people find jobs, housing, and transportation.
  - Support individuals. Strengthen families. Build community.

Your "bucket list" will provide a framework for newcomers to your organization. It will make your mission engaging and clear.

At the event, give people a "tour" — whether actual or virtual — of your mission. This tour (led by a volunteer or board member) should include three stops, one for each of your three buckets. At each stop, tell a story about how your organization changed someone's life. Your guests will be inspired to give and pass on the word about your organization's work.

—reviewed by Terrence Fernsler

What Magic Can Teach You

Magicians have long used their knowledge of the brain to create amazing illusions. You can use that same knowledge as you interact with others, make decisions, and build your organization. Here are some of the lessons magicians can teach us:

- **Never try to do more than one thing at once.** Magicians know how easy it is to confuse people by distracting them. The same is true if you try to talk on the phone and check your e-mails at the same time. Chances are, you'll do neither task well.
- **Use humor and compassion to disarm others.** Magicians know that if they can get the audience to laugh and empathize, they'll lower their guard.
- **Don't let mistakes derail you.** Magicians blunder all the time, but the audience almost never notices because they set their mistakes aside and keep moving forward with confidence.
- **Magicians know how fallible memory is.** They often tell us what happened a few minutes ago, and we don't even realize they've changed some of the details. That's why it's so important for you to keep records of important information and conversations immediately after they happen.
- **When you pay attention to one thing, you ignore other things that are happening right in front of you.** Remember this whenever you're making an important choice, such as who to work or partner with. Focus on each portion of the decision, one at a time, fully and carefully, and don't let yourself be swayed by one detail (such as someone's charisma).

For more, see *Sleights of Mind: What the Neuroscience of Magic Reveals about Our Everyday Deceptions* (Henry Holt and Company, henryholt.com, sleightsofmind.com).

Is the 80/20 Rule Shifting?

A new fundraising survey by the Evangelical Child and Family Agency (ECFA, www.ecfa.org/content/surveys) suggests that "moving donors up the giving pyramid" is the main fundraising effort that needs to be fixed, and indicates for the first time that the "80/20 rule" is tilting.

The longstanding "80/20 rule" that 80% of gifts are given by 20% of donors was confirmed by only 23% of respondents (nonprofit CEOs and development officers), while 30% report a 75/25 ratio. This change requires new fundraising strategies to appeal to a broader swathe of donors.

A slight disconnect was noted in data about impact measurement. Almost 72% agreed or strongly agreed their donors are very interested in the impact measurements of their programs, products, and services, yet only 61% communicate these measurements externally.

The most frequent answer to the open-ended question "What area of your fundraising is keeping you up at night?" was donor acquisition. (Several indicated, thankfully, that their concerns don't rise to the level of preventing sleep!)

Practical Ways to Unplug Yourself & Your Workplace

You can't be at your productive, creative best when you're busy managing technological distractions, as so many of us are. *Hamlet's BlackBerry: A Practical Philosophy for Building a Good Life in the Digital Age* (HarperCollins, harpercollins.com) offers ideas for creating a meaningful life in our overly connected era:

- **Don't assume that the newest tool is the best one for your task.** Sometimes older devices will work better, and playing with old tools can relax the mind and mitigate information overload. Holding a book or magazine in your hand, for instance, has a centering effect you won't find online, on TV, or in an e-book. Writing someone a letter instead of an e-mail connects you in a completely different way. Collaborating with others and forming teams are time-tested tools that outperform any software you can find.
- **Spend some time each day away from all your gadgets.** Take a walk, and leave your smart phone behind. Do something that absorbs you, like gardening, cooking, swimming, or playing an instrument.
- **Pay complete attention to one thing at a time.** Have a one-on-one chat with someone, and really listen.
- **Consider an "Internet sabbath" — one day a week** that you turn off all your phones, TVs, computers — everything — and enjoy the peace.
- **Institute "quiet time" in the workplace** — four hours every week in which e-mail is shut down and phone calls go straight to voice mail.
- **Encourage people at work to talk to one another in person** instead of by e-mail whenever possible.
- **Organize meetings in which you and your colleagues trade tips** about gaining control over technology, simplifying your lives, and homing in on what's really important.

Measuring Accountability in Nonprofits

Even though the importance of accountability is widely acknowledged, nonprofit managers tend to give it short shrift. Explorations into this complex subject are always welcome, and *Accountability and Effectiveness Evaluation in Non-Profit Organizations* (Routledge, routlege.com) is an especially revealing look at the subject.

The authors, James Cutt and Vic Murray, explain how they set out to persuade senior staff in a group of human service organizations about the benefits of developing accountability information. In the process, they learned what was working and what wasn't, and discovered, to their surprise, the political aspects of evaluation.

Their early research led to the creation of logic models with associated outcome measures and methods of evaluation. The Balanced Scorecard is a logic model that they found useful in establishing accountability in nonprofit planning and reporting. They explain the application of the Balanced Scorecard in evaluation. The Canadian government has a widely-used framework for evaluation; the authors adapted this model into a modified Balanced Scorecard approach to better establish accountability. After taking the reader through each step of their research, they conclude with lessons learned along the way.

This explanation of their research is intended primarily for academics and evaluation professionals. Yet, if you can sort through the scholarly language, it can help you clarify what should be evaluated and how to do so to improve your organization.

The book will open your eyes, as it opened the eyes of the authors, to the political frame of evaluation, especially the power dynamics between the evaluator and evaluatee. It's a fascinating, honest look at tools for improving the effectiveness of nonprofit organizations.

—reviewed by Terrence Fernsler

How Does Social Networking Impact Your Mission?

Nonprofits' use of social networking is often still experimental. Measuring the effectiveness of social fundraising is in its infancy. Still, in *Measuring the Networked Nonprofit* (wiley.com), Beth Kanter and Katie Delahaye Paine have come up with thoughtful ways to calculate the impact of social media on mission.

Just adding up numbers isn't enough. The right kinds of assessment can help your organization use social networking to change the world intentionally, not just through luck. Connecting with people and building relationships — what social networking is all about — are important tools for social change. This book demonstrates how gauging online relationships — through deepening commitment — affects outcomes offline.

The authors learned from experimenting with measures themselves. They offer simple steps to appraise what matters. Their advice is useful for all types and sizes of organizations, no matter their capabilities and levels of social networking use. Sometimes the lessons learned from measurement will be dramatic, sometimes incremental.

Social networking isn't just a shiny new gadget; with measurement, it becomes an important tool for social change. Assessing results can help you decide which methods to keep pursuing and which to drop. Careful, planned, continuous measurement will help your organization become both more efficient and more effective.

Social fundraising is difficult to measure because it's rarely used alone. It's almost always found in combination with other fundraising activities. To isolate the impact of the social fundraising component:

- **Put thought into choosing your metrics.** Social fundraising drives behavior in many ways. For example, you might calculate the percentage increase in:
  - frequency of donations
  - number of donors
  - size of donations
  - number of first-time donors
  - time between donations
  - number of new volunteers
  - size of your network
  - cost per donor acquired.
- **Create a tracking system** to follow each of the metrics you choose.
- **Roll out your fundraising campaign in phases** so you can measure various components of success, including social media, at each step along the way.
- Look at as many potential influences as your budget allows.

Social networking shouldn't be viewed as a magic elixir that will solve all your communication issues; it is *one* tool, a tactic that can be used strategically by learning how to measure its effects. There are no better experts to help you do so than the authors of this fine book.

—reviewed by Terrence Fernsler

Laughing Together

Nothing motivates, reassures, and connects people like shared laughter. Use humor like glue to create unbreakable bonds and teams. *Humor 101* (Springer Publishing, springerpub.com) provides insights into why and how laughter works:

- **Humor is interactive and affiliating.** It enhances connections between people in a way nothing else can.
- **Having a sense of humor makes others like you more.** Surveys show that when people simply say they have a sense of humor, others rate them more positively.
- **You don't have to be a jokester or comedian to get people laughing.** Often it's not the person but the situation that's funny. Just notice your surroundings and let people in on the funny stuff that's always going on.
- **Your style of humor is important.** Those who tell formal jokes, especially "negative" jokes that make fun of people, don't usually create positive bonds and may even break ties with people. Even those who ridicule themselves can be viewed negatively, unless they hold very high status in the group. Men who tell jokes at someone else's expense can make women view them as hostile, violent, and cruel. The best humor for knitting people together is the informal the kind that allows everyone to laugh at a situation they all have in common.
- **A sense of humor is one of the traits people want most in their leader.** Positive humor correlates with employee satisfaction (although "negative" humor, especially aggressive jokes that target others, does just the opposite and causes employees to rate such leaders as less capable and effective).
- **During times of change, humor is especially crucial.** It heightens motivation, relieves stress, and builds trust. People are much more willing to follow a transformational leader through the change process when a dash of humor is added to the mix.
- **Take care when writing, e-mailing, phoning, or otherwise connecting with people when you can't see their faces.** The essence of humor is often lost in such communications and can even offend and alienate people.
- **Be wary of using sarcasm and irony, which don't translate well,** especially between people of different cultures, ages, and backgrounds.
- **What's needed more than jokes is a sense of fun and playfulness in the workplace.** People often laugh for no other reason except that they're happy. Just hearing someone chuckle or seeing someone smile is enough to improve people's mood.
- **"The best way to get funny," says author Mitch Earlywine, is to "see that life is funny."** The way to do that is to be in it right now. Then there's no joke to tell. Instead, there's the shared laughter that says, "We're all human, living an amazing, hilarious existence on this crazy earth!"

Boon or Curse? It's Up to Us

Our technological world is bringing us together and tearing us apart at the same time, as the authors of *Mobile Communication* (Transaction Publishing, transactionpub.com) attest. Edited by Rich Ling and Scott Campbell, the 348-page book includes essays by scholars from around the world, who provide valuable insights into how we can use our gadgets to increase social cohesion.

But, they warn, take care not to use your devices to replace face-to-face interactions. If you do, you may increase your feelings of isolation and division.

Are You Ready for the Cloud? Use This Checklist to Be Sure

With interest in cloud computing moving past the early-adoption phase, many nonprofits are moving their systems to the cloud. There are many benefits to be derived from cloud computing — including reduced complexity, lower IT support costs, and unlimited scalability.

But moving to the cloud can be complex, and you need to proceed carefully. To help with the process, UNIT4 Business Software (Unit4software.com) has developed a checklist of five questions that nonprofits should ask to ensure success.

1. **Have you defined the scope of your move to the cloud?** The first decision is whether to move all your systems in one go or start with non-core components before looking to move your Enterprise Resource Planning (ERP) system. A hybrid approach to cloud computing is often ideal if you use highly configurable systems which have been designed to meet your specific needs. In that case, movement to the cloud will likely be gradual.
2. **Is your current system agile enough to cope with changing requirements?** Not all ERP systems are created equal — especially in the case of cloud versions. Some ERP solutions have one version for on-premises deployments and a different "lite" version for the cloud. Be certain you're not giving up any flexibility or functionality when you move to the cloud version. In particular, be sure that when you need to make changes to your system in the future, your cloud solution doesn't create barriers to action.
3. **Have you prioritized which data to move?** Do you need to move all historical data or can you pare it down to the information that's vital for running the organization today? There are no hard and fast rules. Many nonprofits assume they should retain mission-critical data in their own on-premises data center, thinking it will be safer there. Actually, however, serviced cloud data centers are highly secure with all the state-of-the-art systems to ensure reliability, security, and performance.
4. **What service and security considerations do you need?** Whatever the promises of cloud computing, it's important that you know what's happening in the cloud, how your applications are being delivered, and how traffic is being controlled and directed. Evaluate the cloud provider's security capabilities, reliability history, and privacy clauses, including their back-up and recovery programs and service level agreements. Service providers should openly share the results of internal or external security audits, as well as statistics on security incidents (such as data breaches or downtime) and security certifications.
5. **What Disaster Recovery (DR) plans do you need?** Ask your potential cloud provider about its disaster recovery offerings to ensure continuous availability, maintain operational continuity for your organization, and insure against the loss of critical infrastructure and data. You should know when information is moved to another data center and be kept abreast of uptime and physical location of data storage.

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Please include your name, organization, address, phone number, and e-mail address. If you'd like your comments to appear anonymously, please let us know. We look forward to hearing from you!

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