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FINDING THE COMMON THREADS

By George Stanois

These days, I've been thinking a lot about faith. For many believers, their faith determines how they live. It gives them hope. And, importantly, having a shared faith brings people together, creating community. It's a powerful thing.

When it comes to fundraising and philanthropy, shared beliefs—our common threads—are fundamental for successful plans. As Senior Consultant **Michelle D. Harder** explains on page two, there is a sense of community that binds faith-based organizations. In her experience, a shared faith can inform and power a good plan. Together, these things can help churches not only keep the lights on, but also evolve with their congregations.

Finding common threads isn't exclusive to religious organizations. On page three, Senior Consultant **Daniel Tessier-Young** shares a few steps that non-profit associations need to take as they look to diversify their sources of revenue beyond member dues. A good plan delivers what the members really want, he says. What is it that they most need?

When we're moved to support a cause, or take part in an initiative, we see something of ourselves in it. So, once you've got the plan, be sure it resonates with your audience. (If you're looking for a communications crash course, read the excerpt from **Peter Barrow's** chapter in *The Vigilant Fundraiser* on page four.)

A plan that resonates is a plan that works. Keep the faith!



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ACTS OF FAITH: Q&A WITH MICHELLE HARDER

Expert Michelle Harder joins Goldie, bringing a new focus on faith-based fundraising.

As one of the newest members of The Goldie Company's established team of experts, **Michelle Harder** brings more than two decades of experience with non-profits and charities to her practice. We asked about her career, experience, and plans for the future of faith-based fundraising at Goldie.

How did you find yourself working in fundraising, Michelle?

It's a family story. My late father, Ben Harder, ran a successful fundraising consultancy for several decades. When I decided to take a year off before going to law school, he asked me if I wanted to learn his business. After six months on the team, I realized philanthropy could be a fulfilling way to realize my goals, too. A few years after joining Harder & Associates, I pursued a Master of Arts in Philanthropy and Development to add depth and breadth to my fundraising portfolio.

At Harder & Associates, you worked solely with faith-based organizations. What are some of the things you learned while working with these clients?

For many churches, attendance is in decline. In dire situations, they're faced with having to close their doors. If churches are being proactive about what they need—a succession plan, a new building, or major repairs, for example—they have a better chance of keeping the congregation engaged and supportive. At Goldie, we're focused on building our faith-based practice to help leaders think about their church's future needs and build strategies for success.

How is faith-based fundraising different from raising money for other causes or organizations?

Shared faith brings people together. Your faith reaches into every part of your life, including how you make decisions. Few non-profits affect people at that level, and the statistics demonstrate how this impacts charity—in 2013, donations made to religious organizations represented 41% of all funds given by Canadians in that year. Fellowship is a powerful thing, too. In fundraising for churches, a shared faith and sense of community can help clarify goals and bring people together to achieve them.



What are your first steps when you meet with a new client?

When we meet with church leaders, we want to understand the organizational culture and the vision. We also want to establish whether they're ready to run a campaign. Are there any issues or barriers? Leaders and ministers are not always aware of the church's financial situation—for example, often it's 20% of the congregation giving 80% of the funds, and usually, that 20% is comprised of an aging population. These statistics can be surprising, but if we know these things before we launch a campaign, we can face challenges head on.

“ **If churches are being proactive about what they need...they have a better chance of keeping the congregation engaged and supportive.** ”

What is one thing you learned about fundraising from working with your father?

My father was passionate about his faith and stewardship. “Stewardship is a learned behaviour,” he wrote in one of his books. “We learn it through teaching, leadership modeling, and some process and form.” I think this remains true today, and it is especially important for churches that want to grow and thrive.

BEYOND MEMBERSHIP

Daniel Tessier-Young offers a path for associations pursuing non-dues revenue.

Balancing the needs to achieve financial sustainability and provide valuable benefits to members is what often drives associations to explore options for non-dues revenue—that is, revenue that is above and beyond the cost of basic membership.

Non-dues revenue can take different forms. Some associations offer workshops, conferences, or certifications. Some build partnerships with vendors, advertisers, or sponsors. Others pursue project grants. While there are many avenues for non-dues revenue, **Daniel Tessier-Young** says it's critical for associations to deeply consider the options and their impact before they launch a plan.



A new member of The Goldie Company's team of senior consultants, Daniel brings a solid record of achievement in association management, public affairs, advocacy, and event planning. We asked him to share some of the basics of pursuing non-dues revenue.

1 Assess your goals and expectations.

"Before they launch new initiatives, leadership and staff should review the organization's goals," Daniel says. "When I work with an association, I encourage them to dive deeply into this process. Do your existing activities support your members? Are they getting value from these activities, or could funds be used differently for more significant impact? Do your members expect you to raise revenue? Do the proposed new initiatives align with the organizational goals?" Daniel suggests organizations assess where they are, where they'd like to go, and why. "Increasing revenue with no particular goal or aim will make your job difficult—and you'll begin to lose sight of strategic goals and what really matters to your members," he says.

2 Aim for impact.

After conducting a deep dive and consulting with members, some organizations determine that they need to explore options for increasing non-dues revenue. In choosing new initiatives, such as workshops and conferences, they first need to consider the value to members. Are you giving up particular resources or dedicating resources at the cost of something that is important to your membership?

3 Be realistic.

Double (and triple) check that your organization can achieve success with its new offerings. "In their enthusiasm to achieve financial goals, senior leadership can sometimes overcommit staff," Daniel says. "When your staff can't keep up with demands, their ability to meet strategic objectives is diminished considerably."

4 Adjust resources—and expectations—accordingly.

Committing to a plan and expecting success may mean that the organization will need new or different resources. Do you have the right staff complement in place? Will you need external support? Do you need to redirect current staff or funds to address a particular need? As well, remember that new initiatives take time to build. Therefore, it's a good idea to set ambitious but achievable metrics. "If you choose to move forward with new initiatives, start small. Make a plan to check in and assess progress regularly," Daniel says.

The most critical part of pursuing a non-dues revenue plan is putting forward a solid rationale to your members, Daniel adds. "If your members see a benefit in the offering, they may be more willing to champion the direction and, if the value is there, they could potentially enhance their contribution to help it grow."

WHO ARE WE AND WHAT DO WE DO?

In this excerpt from The Vigilant Fundraiser, Peter Barrow offers five key steps to developing effective communications about your charity.



Many organizations launch into major capital or project-based campaigns without planning out or implementing a comprehensive communications program to build brand awareness, raise their profile, tell their story, connect with donors on an emotional level, and explain why they need money and how they will spend it.

Here are five key components that are part of building an effective communications plan.



1 Goals or Objectives

These should be as precise and measurable as possible, ideally following the SMART formula (Specific, Measurable, Achievable, Realistic, and Timely). A goal that says “we will increase awareness of our brand” is fine but hard to measure. A goal that says “we will increase our brand awareness among the top 100 business people in our community” is much better.



2 Target Markets

A clear list of who you want to reach. These are usually groups of people, not individuals. You can identify these groups by things they share, such as similar professions, cultural beliefs, age ranges, etc.



3 Key Messages

Short, memorable, emotionally appealing and easy to remember, the key messages will underpin everything you do and run “like a golden thread” through all of your communication pieces. Great messaging that truly reflects who you are, what you do and why you matter to the donor group is often tough to achieve. Remember that a great message implies benefits to the donor group rather than features about you.



4 Strategies/Tactics

Classic marketing suggests that strategies and tactics should be two different things. Strategies are the big picture overview of what you need to do. Tactics are usually how you achieve the strategies and thus goals. Ideally, select three to five tactics at most, so that you can control and manage them and use your resources prudently.



5 Actions and Timelines

Finally, you need to clearly spell out who will undertake the various tactics and when initiatives should be launched and run.

If you follow this step-by-step process, you will have a strong, workable, easily understood communications plan that helps you to build your brand, connect to the audience, tell your story and, most important of all, raise money!

Interested in reading the full chapter, or exploring more from
The Vigilant Fundraiser?

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