

## **New Lens for the New Moment: The Four Predictive Indicators for Fundraising Success**

### **Introduction**

While a simultaneous global pandemic and racial equality movement has ushered in unprecedented times for organizations, the four predictive indicators for fundraising success remain constant:



*Case for  
Support*



*Philanthropic  
Potential*



*Volunteer  
Leadership*



*Resource  
Investment*

For Compass, we are drawing on our deep experience working with mission-driven nonprofits over the past 30 years and looking at our four predictive indicators through a new lens as organizations navigate these times and prepare for future success. We understand that the pandemic carries into our organizational lifecycle much longer than initially anticipated, demanding a closer look at our fundraising operations and outreach within these parameters.

### **Case for Support**

The Case for Support provides organizations the opportunity to translate their strategic plan and current needs into a bold vision and strong case for philanthropic support. To develop or refine your case for significance and impact in these times, these three questions can guide the narrative:

**1. What is most important – and most relevant – in this moment and as you look to the future?**

Is it when school children can once again visit your national park or historic site on a field trip? Or is it when we can safely gather crowds in your museum, theatre, or stadium? Is it when the scholarship allocation for minority students is at 50 percent, or 100 percent? Is it when volunteers can once again build homes for community members who need them now more than ever?

**2. What is your current competitive advantage?**

While you may know your competitive advantage historically, do you know what it is in the wake of COVID-19 and George Floyd? Identifying and sharing this advantage through specifics about your current and long-term impact on society connects directly with how and why you raise money, and why you do what you do. Talk about the specific programs and outreach you execute that are like no one else's and that prove beneficial to society's current needs. What makes you unique – and impactful - in this moment?

### **3. Is your organization worthy, versus needy?**

Conduct a mission check. Is your mission contributing to societal needs? Are you doing what you say you are going to do? Are you an organization that is worthy of external support or are you an organization that is constantly in need of help to keep its budget balanced to stay afloat? Which type of organization are you? Which do you want to be? Think of your organization as an investment and a partnership in these ever-important times – are you worthy of individuals investing their time and resources and becoming a committed partner of your organization? If the answer is not a resounding “yes” then strategically consider how to remedy such and relay that in your Case for Support.

Then, once you have created a Case for Support that demonstrates your significance, relevance, impact, and worthiness, share it with your constituents. Connect your case with each of your donor segments: major donors and prospects, annual donors and prospects, planned giving donors and prospects, long-time supporters, new friends, corporations, and foundations. If you can keep them informed, you can get them involved. If you get them involved, you will get them inspired to partner and invest.

### ***Identified Philanthropic Potential***

With travel and in-person events in flux, this is an opportune time for your fundraising team to identify and qualify philanthropic potential within your organization’s constituency. These ten action steps for maximizing philanthropic potential will determine availability of support for this moment as well as for the future, setting your organization up for fundraising success.

#### **10 Means to Maximizing Philanthropic Potential**

- 1) Ensuring the health of your database – clean up
- 2) Expanding the prospect pool with new growth
- 3) Screening database to help sort and prioritize against wealth indicators
- 4) Researching to determine potential and interests
- 5) Establishing systems for tracking movement
- 6) Identifying top prospects with the greatest potential for investment
- 7) Assigning prospects to a solicitation team: relationship manager, natural partners, lead solicitor, etc.
- 8) Developing short-term and/or long-term prospect strategy
- 9) Finalizing the appropriate ask amount
- 10) Creating a central calendar to facilitate coordination of all fundraising activity (cultivation, solicitation, and stewardship)

### ***Dedicated and Committed Volunteer Leadership***

Your organization’s ability to attract more resources and support—both in good times and bad—relies on the positive relationships established with your board, volunteer leaders, and constituents. If you want individuals to invest time and resources in your organization, you must continue to source and engage those who are truly committed to your organizations and advancing your mission. A small cohort of strongly committed volunteers will better serve you than a large cohort of less-invested individuals.

To strategically engage volunteers and keep them active, work to create opportunities that are not only relevant (such as a charge for increased Diversity, Equity, and Inclusion) but also lead to an easy “yes” when asked to volunteer. This is especially true in times of fluctuation, such as we are seeing with the pandemic. Establishing shorter-term stints with realistic goals allows for volunteers to devote their time to the organization and then step away, when appropriate. This instills a notion of success when the goals are met, avoids volunteer fatigue, and can lead to another positive volunteer role for this individual in the future.

With your volunteers, take as strategic an approach as you do with your staff. Allow them to be true partners and assess their skill sets so that they align with the role assigned. When a volunteer feels like his or her time and resources have been put to good use and accomplished a goal, the likelihood increases of another “yes” when their support is needed in the future.

**Best practices for developing – and keeping – committed volunteer leaders include:**

- Formulating short-term task forces versus long-term committees.
- Developing and communicating a clear role for leadership positions, drafting job descriptions if beneficial.
- Providing specific responsibilities for each volunteer that takes into account the individual’s reach and skill set.
- Planning for realistic goals that can be achieved in the timeframe outlined.
- Incorporating short-term benchmarks and accomplishments.

The Board is a key element of effective volunteer leadership, and this moment is a great time to ensure the strength of the Board. Take time to review the composition of your board in relation to your mission, purpose, and the goals and objectives of your strategic plan. Do you have the kind of board you need to fulfill the objectives of your organization? Create a profile of the skill sets and diversity represented on your current board. Compare those to what you feel is needed to advance your organization as it navigates forward from this moment.

***Strategic Resource Investment***

As difficult as it may seem right now with uncertainties driven by the pandemic, your organization must continue to invest in resources. Operational excellence depends on a strategic investment in the individuals, the tools, the processes, the systems, and the communications that not only maintain, but elevate, your organization.

In times like these, every dollar spent has to be a smart dollar. That dollar also has to make sense in this moment. A first step is an assessment of both your resources that can be maximized for virtual and the defining elements of your organization’s culture of philanthropy.

For resources, consider those already in place and ways they can be maximized for your current operations. Take into account hardware, software, and creative platforms. Ask questions you may not have asked in early 2020.

Is your team equipped to manage meetings and events through their laptop and other devices? Do they have appropriate access to files and publications no matter where they are working? Are you capturing and coding virtual attendees of your webinars in the Events module of your database? Are you producing videos and other engaging multimedia communications to stay connected to your constituents? Are your mailing lists (both electronic and physical) up to date? Is your online presence authentic and inspiring? Do you make the most of your e-platform (Constant Contact, Mail Chimp, or otherwise) with an updated newsletter template and “Donate Now” link? Are your gifts being processed and acknowledged in a timely and efficient manner, despite a less often in-person mail check? Is your case for support (see above) reflected in your virtual materials?

For culture of philanthropy, identify the fundamentals that hold together your donors in a vehicle unique to your organization. For some, this may be a gala that gathers your broadest group of constituents or a private reception for those in your annual giving Society. For others, this may be a publication that celebrates your most loyal donors or a newsletter that shares stories of impact. It may also be a combination of several things done over a typical fiscal year. Once you have defined the core of your culture of philanthropy, ensure that you are investing in its continuation at some level. This may take a high level of ingenuity and resource adaptation, but can be done successfully. Consider virtual options, new platforms, printed pieces, digital access, and other resources that allow you to model the signature elements of what you do and keep your donors connected.

While this may be a challenging time to build new, it is an ideal time to perfect. A strategic assessment and investment of how you communicate, track activity, and engage in a new age equates to operational excellence and sets your organization up for future fundraising success.

## **Conclusion**

Compass has taken a new lens on our four predictive indicators, and so should you. Now is the time to address your case for support, philanthropic potential, volunteer leadership, and resource investment—and let us know if we can help.

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## **About The Compass Group**

*The Compass Group is a national fundraising consulting firm with a portfolio across the sectors of conservation, preservation, performing and visual arts, higher education, secondary education, history and culture, healthcare, and environmental. Since its founding in 1998, Compass has guided over 150 organizations of varying scales, resulting in more than \$2 billion in philanthropic gifts. Through its tailored consultation, Compass builds relationships, strategically assesses, and mindfully incorporates the specific resources and priorities of its clients to ensure philanthropic success at the highest, most specialized level.*



## **About the Author**

### **Robert Bull**

President

*Robert Bull serves as president of The Compass Group, guiding the company's exceptional consulting services while driving Compass' strategic growth and development. Robert is a positive change agent, taking a values-driven approach to the evolving world of philanthropy and the mission-based institutions for which Compass engages.*

*Robert's career spans more than two decades of fundraising consultation resulting in over \$1 billion in philanthropic gifts across the sectors of conservation, education, healthcare, and arts. His experience includes six years with the national consulting firm Ketchum, Inc. where Robert honed his professional fundraising skills of campaign planning and management; major gift strategy development and solicitation; special events management; and volunteer leadership recruitment and development.*

*Robert's resume includes two stints as an in-house fundraiser. He began his career in the advancement office of Washington College where he spent several years collaborating with volunteers, exceeding development goals, and gaining expertise in higher education. Later in his career, Robert joined the National Trust for Historic Preservation as chief development officer, spearheading multimillion-dollar fundraising efforts and facilitating operational excellence.*

*In addition to his role as a seasoned fundraiser and consultant, Robert is an educator, teaching individuals and institutions next-level success through his dynamic speaking, presenting, and lecturing in the classroom and beyond. He also serves as a trustee at his alma mater Goucher College and is currently co-chairing the College's \$100 million Undaunted campaign. He is a former president of the Alumnae/i Association of Goucher College and former chair of The Greater Goucher Fund.*

*Robert holds a Master of Science degree in Organizational Leadership and Management from Antioch University New England and a Bachelor of Arts degree in Theatre and Arts Administration from Goucher College. He has completed coursework at Antioch University in pursuit of his doctoral degree within the Graduate School of Leadership and Change.*