

# Kay Sprinkel Grace

## Dream no Small Dreams

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Sharing the Best Forum 2009 'perspectives'

Thursday 1<sup>st</sup> October 2009

Credit Suisse, Canary Wharf.

12.00

Notes by Rebecca Little-Lasbistes.

Please also refer to Kay's presentation – also available to download from the FSI webpage

<http://www.thefsi.org/sharing-the-best-forum-2009.html>

### **Slide 1: Dream No Small Dreams**

Keynote Talk

FSI Forum 2009

Thursday 1st October 2009

Kay Sprinkel Grace

"When you get done with me you'll retire the word need."

### **Slide 2: "Dream no small dreams for they have no power to move the hearts of men."**

Johann Wolfgang von Goethe

### **Slide 3: What we will cover:**

- **Why small is beautiful but need not limit dreams** – do more to change the world that you can imagine
- **Principles for philanthropic giving that span all sizes of organizations.** "putting away the tin cup!". My father was of the tin cup mentality, he sent me to his desk and I put a circle and a slash on it.
- **How small organisations can be dream brokers.** My belief is that all of us involved in the sector are dream brokers - we have two ears and one mouth – out in communities listening for the dream of others – match them with ours and make it work for the community.
- **What I learned in my first job with a small organisation.** "Flat is the new up!"

There was an HIV/ AIDS organisation that delivered meals at home. It started in San Francisco at a time of great fear. Meals on wheels wouldn't take meals to people with HIV/AIDS. Women prepared meals in their kitchens with donations through a community foundation which raised millions of dollars because people saw a great need.

This inspired me as I saw the impact, I'm working with an organisation with children.

- **Lessons for all small organisations**

- **Moving forward in a time of change**

Can't be as big risk takers as large organisations but can take lots of small risks.

**Slide 4: Why small is beautiful and need not limit dreams**

- It is not the size of the organisation that matters, it is the size of the mission (e.g., Project Open Hand)
- Impact can be huge
- More opportunities for personal attention to nourish major donors (shop in the High Street –vs- Marks and Spencer) Small organisations can recognise the caller by the sound of their voice. This is a great advantage. We need to use our advantage.  
  
More opportunities for engaging volunteers – our “back up work force”. People want to use their skills and learn new skills through your charity.
- Microcosm of diversity in fundraising practices
- Easier to hear the dream

**Slide 5: “I welcome you to the 283<sup>rd</sup> meeting of the Society for Innovation in Fund Raising.”**

Innovation is vitally important online, direct marketing etc are all okay but an *innovation in attitude* is going to be what counts.

**Slide 6: Principles for Philanthropic Giving**

- Big organisation or small, these principles are true:
  - People give to you because you *meet* needs, not because you *have* needs (inspiration)  
We're in a relay race with a torch of hope. We tell stories telling you about the one example that epitomizes what we do.
  - A gift *to* you is really a gift *through* you into the community (you are not the end user of the gift) – a small but great investment vehicle.
  - Fundraising is not about money, it is about relationships and long term investors
  - You have to put away the tin cup

Listen, project and weave into e-communications

Fundraising happens when you successfully develop relationships based on real values.

**Slide 7: Where It All Begins: Values**

- Philanthropy – philosophical
  - Organization-wide values-based philosophical commitment to the importance of relationships (“love of humankind”).
- Development - strategic
  - Of values-based relationships

- Primary task for boards and staff
- Fund Raising - tactical
  - We are successful when we have the philosophical framework and strategic platform to implement our tactical approach to engaging prospects and donors around shared values.

### **Slide 8:**

Philanthropy – Based in Values

Development - Uncovers shared values

Fundraising - Gives people opportunities to act on their values

The second highest reason for not continuing to give was that donors are asked too many times.

### **Slide 9: Mission, Vision, Values**

The basis of all we do

Our framework, inspiration and responsibility

### **Slide 10: Mission**

- Mission is “why” not “what”  
(We exist because...)
- It is bigger than your organisation – describes the human or societal need you are meeting and it should resonate in a way that engages people in a relationship with you (what need do you meet?)
- Master the mission so that it inspires others to desire a relationship with you
- Make the mission manifest through your communications and outreach

### **Slide 11: Mission example**

- Vector Health Programs (medical agency treating hands in a California logging community)
- “Next to the human face, hands are our most expressive feature. We talk with them. We work with them. We play with them. We comfort and love with them. An injury to the hand affects a person professionally and personally. At Vector Health Programs, we give people back the use of their hands.”

We hold back without eviction. People need values to identify with.

### **Slide 12: Vision**

Isn't about you!

- Vision is a key to relationship building
- What is your vision for your organisation's impact?
- If you are seeking legacy gifts, or in a capital campaign, your vision will guide those long-term investments

- Sharing and articulating the vision is everyone's job
- The vision is instrumental in volunteer recruitment, constituency development, donor cultivation, the asking process and donor stewardship

### **Slide 13: Vision Example:**

Pre-School Education Program in New Orleans

"Our vision is that every child in the greater New Orleans area will be ready when it is time to start school."

Imagine being able to say – when we started we had 82% readiness – 87% readiness is because of people like you who shared out vision of readying children or schools. We'd like to ask you to help us make this 90% readiness.

### **Slide 14: Values**

- Where do values come from?
- We derive the shared values from donors and volunteers so we can forge lasting relationships
- We need to link values to philanthropy, development and fund raising
- Values should be the basis of your messages – express in communications
- Use values-linked feedback and stewardship to keep board, non-board volunteers and donors in a strong relationship with Hedgebrook

### **Slide 15: Expression of values**

- A thank you card sent to institutional and individual donors to a special campaign for a university library flooding emergency:
- "Your gift to the Stanford University Libraries helps us assemble the sources, the arguments, the hypotheses, the wisdom and controversies of the ages. For all those here, and those yet to come, please accept our gratitude."

Michael Keller, Librarian

### **Slide 16: Moving from Transaction to Transformation**

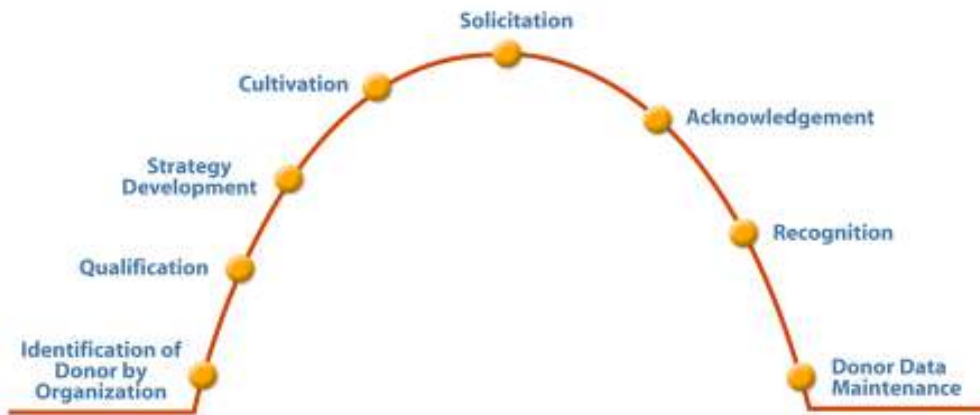
Growing long-term stability by changing the way we engage our donors

### **Slide 17: Transactional Bell Curve: The Way We Have Asked**

We have to get over the traditional bell curve.

Steps are good. Systems liberate, present repetition and helps organisational learning.

What is wrong with this process?



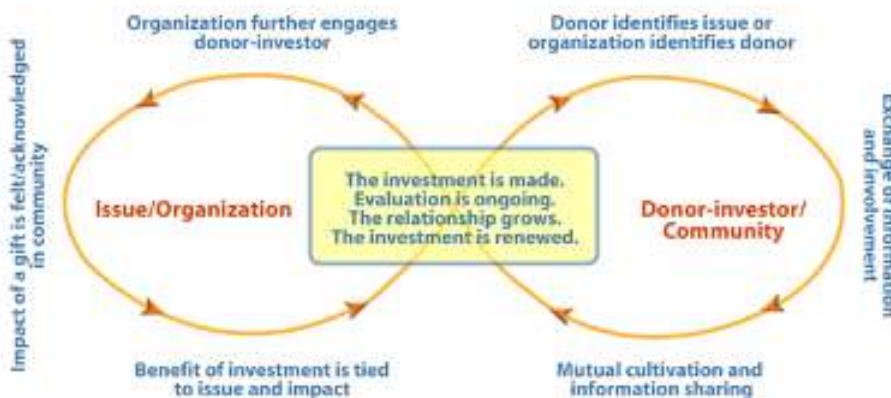
## High Impact Philanthropy

Kay Sprinkel Grace, Alan Wendroff

### Slide 18: Transformational Infinity Loop: A New Approach to Asking

What it feels to the 'caterpillar' is the end is the beginning of the butterfly business.

Gift is a symbol of the relationship "I'm delighted with the impact and inspiration – identify and communicate well our values (e.g. walk in donors) The Bell Curve has no accommodation for this but the infinity loop can help.



## High Impact Philanthropy

Kay Sprinkel Grace, Alan Wendroff

### Slide 19: What Major Donor-Investors Look For In Organisations

- Issues – that match their values
- Ideas – that are innovative, workable
- Involvement – in whatever way engages them
- Impact – statistics + stories
- Investment – "return on investment" very important – beyond fundraising

Kay Sprinkel Grace and Alan Wendroff, 2001

**Slide 20: Stewardship: The Key to Continued Relationships**

What it is; what it requires

**Slide 21: The Goal of Good Stewardship is to Maintain the Relationship**

- Stewardship: the ongoing relationship with a donor based on mutual respect for both the source and impact of the gift (Beyond Fundraising, Grace, 1997; Second Edition, 2005)
- A key ingredient in effective stewardship is the ability to communicate progress towards vision
- We engage our donors through stewardship: their commitment to us motivates them to help us bring in new prospects and donors who share our values and vision

**Slide 22: Maintaining the Relationship Requires**

- Strategic marketing about program impact (Black & Decker drill – it’s the hole not the drill they buy)
- Information about financial performance (“People no longer give to charity, they buy into results” – Peter Drucker, Wall Street Journal,1989)
- Perceived “ROI” related to the donor’s values
- Our responsiveness to change (windows –v- mirrors)
- A strategic plan based on the reality of the marketplace
- Systems and structures to support change – survey monkey

**Slide 23: Infinity Loop: Keeping Your Donor-Investors Engaged**



Question: What would it take to get you back as a donor?

Answer: They'd have to *show* me that they *know* me.

## Slide 24:



In the moment – the donor is all that matters.

## Slide 25: Why What You Do Now Is More Important Than Ever

Knowing how to navigate in a turbulent economy: key strategies and messages

Compassion fatigue. Key messages to emphasise.

## Slide 26: Key Messages for Success Heading Into a New Decade

- How the impact of your organisation favors the donor's two (or three) portfolios (financial investment, social investment, development of social capital) - our mistake is to talk about our deficit in funding, reminding them of their deficit.

It's been a rocky year for all of us, but let me tell you about the impact your gift has made!

Development of social capital.

- The importance of community investment
- The sustainability of your organisation
- The community impact of your organisation
- Your own "testimonial" as to why you stay involved and engaged
- The benefits to donors of continuing their support

## Slide 27: Long Term Relationships: Helping Donors In-VEST

- Values – donors must share your values to stay engaged over time
- Engagement – keeping them "in the loop"
- Stewardship – the active relationship-building with those who support you through outright or planned gifts and through their volunteer work
- Trust – accountability, transparency, disclosure

## Slide 28: Specific Activities That Work

- Become community connectors

- Master your “elevator speech” (and an elevator question)
- Focus on stewardship
- Create board/staff partnerships in building relationships – and partner with donor-investors to increase their sense of engagement
- Know the key points of both annual and capital opportunities for your organisation

Time of ‘psychic poverty’ – people feel poorer than they were but don’t assume that means they will not want to give to you today, tomorrow, next year.

### **Slide 29: Making Strategies Work in a Small Organisation**

Overcoming challenges

Capitalizing on opportunities

### **Slide 30/31: Strategies for Overcoming Challenges**

- Maintain your own enthusiasm and sense of abundance
- Be consistent and expansive in your outreach to continuing and new supporters at every level
- Formulate and communicate the answers to tough questions so you and others will be able to assure donors about your future, impact and importance
- Keep communicating even when people don’t give
- Don’t focus on diminished resources or programs
- Convey your impact, not your needs
- Let them know that the dream or vision is intact
- Embrace volunteers
- Believe there is still money out there
- Intensify your focus on legacy gifts
- Be better stewards of all donors

### **Slide 32: My Story**

Stabilizing a small organisation

### **Slide 33: 1980**

- Development Director, no professional experience
- 35 year old organization; founders still involved
- Many long time donors, no active major giving program
- Few systems in place
- Mostly direct mail and events
- Great board, but only a few involved in fundraising

- Development Staff = 3 FTE

### **Slide 34: 1983**

- Major giving program in place with board
- Remake of all print collateral materials (pro bono)
- Reduction in number of events and addition of one larger event with sponsorship
- Creation of board corporate support committee
- Planned Giving and Active Memorial/Honor Gift Program in place (still reaping benefits)
- "Systems liberate" and NO addition in staff

### **Slide 35: What I Wished I Had Then?**

TECHNOLOGY!

- to leverage impact and communication

### **Slide 36: Technology**

- Donor stewardship interactive 2.0 programs
- Planned giving support programs: Crescendo, Future Focus
- Email communications to keep donors in touch
- Website promotion of organisation's accomplishments and opportunities for those who are searching for YOU – keep website up to date (use a volunteer) or take it down!

### **Slide 37: Key Insights from My Experience**

- Engage volunteers
- Keep the programs simple
- Keep the materials simple
- Systems liberate
- Get your story out
- Market the success stories
- Make legacy giving an option in all major asks
- STEWARDSHIP

### **Slide 38: Daring to Dream**

Small is beautiful: reprise

### **Slide 39: The Paradox of Urgency**

- The constant challenge of the professional: urgency of the need being met (the dream or the vision) –vs- the urgency of needing funds for the dream
- Creating partnerships with donor-investors
- Translating dreams into opportunities for action
- Meeting the demands of donor-investors and the community (Lexus “customer retention center”)
- Spinning the story of transformation: community, organisation, donor-investor to move donors from *impulsive* to *habitual* to *thoughtful* to *careful*

#### **Slide 40: Why Donors Drift Away**

- Related to mission drift in many organizations: donors no longer see us as dealing effectively with “their” issue
- Failure to communicate on a personal basis (“Show me that you know me”)
- Failure to connect with them until they self-identify with a gift that gets our attention
- Bad experience (infrequent – more often it is because there is NO experience)
- Small organisations have great advantages in strategic donor retention

#### **Slide 41: Summing Up**

Making your dreams – and your donors’ – come true

#### **Slide 42: How Small Organisations Can Broker Big Dreams**

- Listen for the dreams of your community and your donors
- Personalize all of your outreach and communications
- Focus on your core mission and programs: build capacity but resist the temptation to expand beyond your capacity
- Partner and collaborate: the mission is bigger than any one organisation

#### **Slide 43: Engage Your Donors**

- Individuals are the largest source of long-term gifts: build the relationships, and the money will come. Nurture the relationships, and the donor-investors will stay.
- The advantage of being small is that more relationships can be personal relationships
- Another advantage is that people can get involved in a way that is meaningful to them

#### **Slide 44: Support Each Other**

- FSI brings you together around common community dreams, issues, concerns
- Work with other organisations to strengthen the perception of urgency and relevance of the issue(s) you are addressing
- Our sector shares ideas and successes: we learn from each other and if an idea works, let others know

### **Slide 45: Closing Thought**

“You see things, and you say ‘why?’ But I dream things that never were, and say ‘why not?’”

George Bernard Shaw

### **Slide 46: Dream No Small Dreams**

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