

ChapTalk



FUNDRAISING INSTITUTE AUSTRALIA (CHAPTER 1) SUMMER 2007
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What Makes a Fundraiser *a Professional?*

In FIA's Principles of Fundraising Practice it says that a fundraiser cannot be paid by commission. This has been part of the Principles from the very beginning and will not change with the new codes.

The reason it has never changed is because it goes to the very heart of being a professional fundraiser. As professional fundraisers we should be paid a salary for the job that we do. Of course, the other reason we should not be paid on commission is that it leads to short-term income and does not encourage long-term sustainable fundraising practice.

Should we define ourselves simply by the way we are paid? On one level, yes. This can be the case. We apply for a position of full time fundraising and when we are appointed we are recognised by the organisation and others as a professional fundraiser. Is this enough?

In today's society fundraising is highly competitive. FIA members compete for fundraising jobs with those who have marketing or PR backgrounds. Governments and the public demand a high level of accountability and integrity. Simply being paid as a fundraiser does not qualify anyone as a professional fundraiser.

What is needed to be a professional fundraiser is understanding and experience of modern fundraising practice, compliance with fundraising codes of ethics and practice, and recognition that you are a professional fundraiser through either accreditation and/or membership of FIA.

My wish for our profession is that all these are accepted as essential to being a professional fundraiser and as a result, FIA members are proud to be recognised as professional fundraisers.

To you and your family I wish you a very restful holiday season and a very successful 2008.

A handwritten signature in black ink, appearing to read 'Leo Orland'.

Leo Orland FFIA
Chapter 1 President

Skills Training – *SUCCESS!!*

2007 has seen Chapter 1 deliver another full year of professional development training, not the least of which was the acclaimed Skills 1, 2 & 3 training program. This year we offered Skills 1 courses twice, and both sold out, and one Skills 2 course. An elite group even completed the Skills 3 course. Congratulations to the more than 80 fundraisers who participated in and successfully completed Skills this year, and of course a special thanks to the speakers and convenors of the programs who continue to so readily share their knowledge with peers.

One person who undertook the monster training feat of completing Skills 1, 2 and 3 within the same calendar year was Laraine Shae from Australian Red Cross Victoria. What better appraisal than to hear directly from Laraine about her experience:

What motivated you to undertake the Skills courses this year?

Initially, it was the encouragement from my employer. ARC believe the Skills courses provide a great introduction to, and an all-encompassing overview of fundraising practice. The courses are not overly onerous, nor do they impact too heavily on your time outside of work. They explored current trends in fundraising, and are presented with enthusiasm and energy by current fundraisers working in the field.

From your perspective, how have the Skills courses been of benefit to you?

Completing Skills 1,2 & 3 in one year seemed to complete the course. I felt like I had achieved something major for a year's work in this exciting industry. Meeting such a mix of participants from different backgrounds, skills, experiences, size of organisations, with varying budgets and so on was as much of an experience as were the topics in each course.

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Skills Training - *CONTINUED*

Can you give a reflection of each level of the Skills program – 1, 2 and 3?

Skills 1:

This provided the general basics of Fundraising, ability to role play, classroom interaction, meeting presenters who are willing to share their knowledge and meeting other participants who come from varying NFP & NGM's. Sometimes people are even lucky enough to meet up with others who hold the same role as themselves (for example - three attendees from Skills 1 with Bequest roles now meet up for networking and ideas). The team I was grouped with still communicate and occasionally get together. After all, we did get to know each other very well while preparing for our group presentation.

The 4 day format (weekends), although a big time commitment, gave more opportunity to develop ongoing relationships and prepare for role plays/presentations etc.

Skills 2:

This course gave me an opportunity to refine some of the basics from Skills 1, providing much further, more in-depth sessions on specific topic areas i.e. data base management, Capital Campaign marketing and donor liaison. As this course was not as interactive, it gave you the opportunity to let loose with some of your thoughts and ideas, and just brainstorm concepts.

Skills 3:

This is the session where I started thinking - how could the topic Capital Campaign impact on me? Especially when you are not likely to be involved in a near future capital campaign. But once you got into it, you begin to realise that no matter what the topic, it's all about the process. This course definitely gave us all the steps in the process of Capital Campaigns that we could certainly transfer to other areas in fundraising. Skills 3 got me involved in the project from session one, presentations and learning's were focused on the end result immediately and by the end of the course, I started to own the project. This course was too short and to encourage teamwork and a better final presentation, could be extended.

Overall, the Skills courses provided a most interesting and compelling look at fundraising and started to show me fundraising principals and processes for the future.

Finally, what message do you have for people thinking about undertaking the Skills in 2008?

Do it!

It is great for an overview of fundraising practices and processes. It will help you to determine different areas of fundraising that you may like to explore in the future. The courses develop networking opportunities and give you access to other experienced fundraisers external to your own organisation whom you can contact to discuss ideas. Finally Skills helps you assess where you fit in the fundraising experience and process. Encourage your employer to let you get involved! It is amazing what you learn from others who do a similar role away from the office and in a non-threatening environment.

The final countdown

Fundraising Spotlight

In the final part of his trilogy on supporter care, John Grain from UK fundraising agency Cascaid reminds fundraisers that every single interaction they have with a donor is vital. Here John explains principles seven through ten of Cascaid's 10 principles of donor care (remembering the first seven were):

- Donors want to be recognised and valued for their gifts
- Donors want to feel good about giving to you
- Donors want to know how their money is being used and what difference it makes
- Donors want to be Inspired
- Donors want to feel involved
- Donors want to be impressed

Case study: WRVS

WRVS's fledgling face-to-face and house-to-house acquisition programmes use outstanding supporter care to try to reduce the dreaded attrition rates. A series of three postcards (sent after each of the first three direct debit claims) aims to reinforce the value of the donor's support and the difference they are making. Digital printing adds an extra personal touch, and a short, but powerful message on the reverse builds understanding over the three cards. This is a great example of an organisation really putting their donors at the heart of what they do.

Many years ago when I was a wet-behind-the-ears, idealistic fundraiser, I worked for a charity that sent out survey packs with the ubiquitous pen.

We included the pen because it boosted response rates by a fraction of a per cent, and on the numbers we were mailing, that was worth having. It boosted complaint levels too, but you can't please all the people can you?

Or can you?

Or can you at least try?

Principle 7: Donors want to be asked their opinion

What really frustrated me about this 'survey pack' (apart from the pen of course) was that it wasn't really a survey at all. It was a shallow pretence to lead the reader to a point where they answered a question that was so obvious in its answer and so clumsy in its attempt to then prompt you for a donation that, frankly, I found it embarrassing.

Nor was it just me – the pretence did not go unnoticed by many of the recipients, potential donors one and all, some of whom made it very clear what they thought of this technique.

Worse still were those who had fallen for it and sent additional details about themselves, added messages of support, or offered to do other things – write letters, campaign, even speak on our behalf locally. All were politely ignored because, despite pretending that we wanted to know, we weren't actually interested in their opinions at all – cash was what counted.

When (idealistically) trying to raise these points, I was told in no uncertain terms that it raised money so leave it alone – the only thing that mattered about them was the size of their gift and their tax status.

Fundraising Spotlight CONTINUED

Now, this was a long time ago and thankfully the organisation in question has evolved in its thinking and improved its practices beyond recognition.

I've evolved too so I'm no longer in the wet-behind-the-ears department either. But I still despair at the number of poorly-conceived, copycat survey packs that pretend to ask my opinion while lazily trying to manipulate me into a donation.

Principle 8: Donors want to know you really listen to them

The real frustration is that people do like to be asked their opinion – providing we listen to their answers. A genuine survey can do so much to help inform your fundraising, to give you an insight into your donors' motivations, and best of all to give you an idea of how they perceive you and your work.

Done in the right way at the right time it can deepen engagement and involvement with your organisation and make your donors feel really like they are part of what you are trying to achieve.

Research of this kind needn't be expensive or time consuming, but it does need to be genuine. To ask your donors something when you are not interested in their answer raises expectations that you have no intention of meeting.

I make sure that I meet donors to different charities regularly. I always want to find out whether many of the blithe assumptions we make about our supporters (and their profiles) are actually true. Through these informal discussions, I've had some great insights into why legacy pledgers haven't bothered to tell the benefiting charity (despite being asked).

Often it can be the little things. A donor to a well-known charity told me that he had been asked for his email address as part of a membership drive. But after six months he had not received a solitary email, and so he was feeling "a bit peeved". A simple example of not meeting expectations, that hadn't gone unnoticed.

These two principles of asking and listening are fundamental to providing good supporter care.

Unless you are asking and listening (and learning) with genuine two-way communications, your organisation is no different from the party bore who talks endlessly at you, and never listens to a single thing you offer in return.

Principle 9: Donors judge you on every interaction

And it is on precisely this quality of communication that you will be judged – each and every time. It matters not to a supporter that they come through to the wrong line when they call – it is still the right organisation as far as they are concerned and you need to respond accordingly.

Twenty years ago, when he was chief executive of Scandinavian Air Service (SAS), business and leadership guru Jan Carlzon developed the 'Moments of Truth' theory, which asserts that your customer (or donor) will judge you on every single interaction that they have with you – no matter how large or small.

Carlzon described SAS as "not a collection of material assets, but the quality of the contact between an individual customer and the SAS employees who serve the customer".

He then said: "Last year each of our 10 million customers came into contact with approximately five SAS employees, and this contact lasted an average of 15 seconds each time. The SAS is 'created' 50 million times a year, 15 seconds at a time. These 50 million 'moments of truth' are the moments that ultimately determine whether SAS will succeed or fail as a company."

I once took a call from a major donor who made a regular donation of £6,000 per month to the organisation I worked for – with tax reclaim it was worth close on £100,000 per year. He was not only a very valuable donor, but also a loyal one – one whose mother had recently died and, after dealing with the funeral, he had taken the last of her household goods to one of our retail branches.

He had then received such an ungrateful and unpleasant service from the shop volunteer that he had gone home and cancelled his standing order and started giving elsewhere – just like that.

Fundraising Spotlight CONTINUED

As moments of truth go, this was a very unpleasant one. It graphically brought home to us that we didn't have exclusive control over his interactions and contact with us.

And one that made us realise that all our volunteers needed some basic training of their own before they were allowed to roam the shop floor.

...and deliver it through your service.

Principle 10: **Create a buzz around your organisation...**

If you're unconvinced, let me offer you two commercial examples of how putting customer service at the heart of your organisation can give you huge competitive advantage and create massive shifts in culture and perception.

First Direct was the first bank that opened 24 hours a day, seven days a week, and didn't mind a bit of good natured banter with worse-for-wear students at 4am. A bank that through its service revolutionised how banking was done; that was the catalyst for longer opening hours and a myriad other shifts in banking culture.

At the same time, Direct Line made dealing with insurance easy – they sounded like they actually believed you, they organised replacement goods, courtesy cars, and made payouts quickly and easily.

Between them, they transformed two of the biggest business sectors through a total focus on and dedication to service.

Customers flocked to them in their hundreds of thousands. Imagine that as your donor acquisition programme.

WRVS's post face-to-face (featured in previous article) postcards are a great example of a charity adopting the Direct Line approach and really putting their donors at the heart of their work.

And they and all charities need to, because you will see evidence everywhere of increasing consumer authority driving commercial and media agendas: from the Co-op ("join us and influence our policies") to Radio Five (listeners are often invited to provide the choice of phone-in topics).

Customers are starting to make the rules – how will you react when your donors do the same?

Cascaid's Donor Care Philosophy

We think:

By giving donors what they want, when they want it, in the way they want it, you will make them happy.

Because we know:

Happy donors give for longer, give more often, and give bigger gifts.

Which means:

Better donor loyalty, better lifetime values, and more income on your bottom line.

*John Grain, Cascaid's
Director of Supporter Care*



Chapter Executive Committee - Call for Nominations

Get involved and make a difference to your membership!

FIA Chapter 1 Executive Committee can be proud of their achievements over the last 12 months. The high quality of PD events is a reflection of the level of commitment given by volunteer Executive Committee Members. Thank you all, for your time and energy.

2008 is approaching rapidly. Although planning for the PD program is well under way this is your opportunity to join the team and become more involved with your peak professional body. There are no particular prerequisites, apart from passion, dedication and enthusiasm. Have you considered joining the Chapter 1 Executive Committee, one of the sub-committees – or just generally helping out from time to time?

By now you will have received a nomination form via post. Alternatively visit our website, www.fia.org.au.... But hurry, nominations close 5pm 14 December.

For more information, please contact one of the current Chapter 1 Executive Members, or Member Services on 03 9830 7211.

Congratulations Peter Dalton!

On behalf of all at FIA, we would like to congratulate one of our own, Peter Dalton, on being accepted onto the international board of CFRE.



It's great to see a local member gaining such a high profile appointment on the international fundraising stage.

Peter has a long history with FIA. He has been National President as well as being responsible for chairing previous FIA National Conferences and other important events such as Madison Down Under. The Certified Fund Raising Executive (CFRE) designation is a personal and professional achievement that sets standards in philanthropy. Well done, Peter and our warmest wishes for a successful term of office.

Chapter 1 Executive Committee Members

Leo Orland FFIA	President	leo@robejohn.com.au
Sharon Hillman MFIA	President Elect	sharon.hillman@austin.org.au
Jeremy Maxwell CFRE FFIA	Treasurer / Govt & Public Affairs	jmaxwell@epilepsy.asn.au
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Peter Burnett MFIA	Regional Members	zpmb@bgs.edu.au
Judy Orford AMFIA	Chapter 1 Consultant	jorford@fia.org.au

Diary Dates

FEBRUARY 2008

Feb 13 - Chapter Annual Meeting
Details TBC

Feb 23-26- FIA's 31st International
Fundraising Conference,
NEWFrontiers,
Perth Convention and Exhibition Centre

MARCH

March 6
SIG: Bequests
Details TBC

March 12
Cocktail Function
Details TBC

March 27
SIG: New Fundraisers
Details TBC

Next Time in Chaptalk, look out for...



'Dear Mal' returns.
This gives fundraisers
the chance to ask our columnist
those curly or not so curly
fundraising questions you
want answered. So if you have
any questions please email
jdearago@fia.org.au and we
will do our best to feature your
questions.

'Learning's from abroad'.
This feature highlights some
key learning's from recent
international fundraising
conferences abroad, namely
the Institute of Fundraising
Convention in the UK and
the International Fundraising
Congress held in Holland.

FIA Member Services Department

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New Members

Chapter 1 would like to welcome the following
new members who have recently joined us:

Mr Patrick Davis	Communications Coordinator	Able Australia Services
Ms Emely McCord	Community Liasion	Able Australia Services
Mr Chris Stallard	Marketing Production Coordinator	Able Australia Services
Mr Glenn Lawless	Development Manager	Annecto Incorporated
Mr Mark Thomas	Supporter Liaison	Australian Conservation Foundation
Ms Jenny Brown	Marketing and Communications Officer	Baptcare
Ms Mary Hodson	Manager Fundraising & Retail	Broadmeadows Uniting Care
Mr Ivars Draguns	Direct Marketing Co-ordinator	Bush Heritage Australia
Mr David Houguet-Pincham	Chief Executive Officer	DepressioNet
Mr Ian Crawford	Community Development Officer	Epilepsy Foundation of Victoria Inc.
Mrs Jane Galloway	Corporate Partnership Manager	Guide Dogs Victoria
Mr Danni George	Marketing Officer	Guide Dogs Victoria
Mrs Shaylene Bloxham	Marketing Communications Coordinator	International Diabetes Institute
Miss Fotini Kevezitidis	Development Manager	International Diabetes Institute
Mr Ashley Rosshandler	Founder Karma Currency	Karma Currency
Mr Andy Scobie	General Manager Business Development	Lighthouse Foundation
Ms Liz De Nittis	Planned Giving Manager	Prahran Mission
Ms Anthea Iva	Direct Marketing Manager	Save the Children Australia
Mrs Wendy Duri	Trust & Foundation Coordinator	St John Ambulance Australia (Victoria)
Mr Gavan Woinarski	Fundraising Manager	St John Ambulance Australia (Victoria)
Ms Cath Nicholson	Event	St. Vincent's Foundation
Mr Jonathan Joseph	St. Vincent's Foundation	Strategic Public Relations Australia (SPR)
Ms Angela Goodwin	Project Manager, Database & Special Events	UnitingCare SHARE Community Appeal
Mr Theo Gouskos	Major Gifts Officer	University of Melbourne Advancement Office
Mrs Aimee Dempster	Advancement Assistant	University of Melbourne, Faculty of Architecture Building and Planning
Ms Vanessa Williams	Alumni and Foundation Officer	Victorian College of Pharmacy Foundation
Mr James Nevein	Fundraising Specialist	Vision Australia
Mrs Georgina Liew G.M	PR Team Leader	WISE Employment