Organizational Development
'the wind beneath your wings'

Caribbean Animal Welfare Conference
Santo Domingo, Dominican Republic

Sandra Monterose-ASPCA & Maximiliano Brandt-WSPA

April 22, 2008
10:45 AM - 12:15 PM

"Change your thoughts and you change your world. "

Norman Vincent Peale

Welcome!!!

- Organizational Development Outline

    - What is it, and why do I care?
    - Organizational Culture and stage
    - A solid foundation- Vibrant mission Statement
    - The best in what you do – Appreciative Inquiry
    - The people on your bus –
    - 1st steps

What is Organizational Development?

- Anything done to better an organization
- The structure, capacity and culture that allows an organization to develop, accept change, and achieve its mission
- A process that involves reflection, system improvement, planning, and self-analysis

"Only those who attempt the absurd will achieve the impossible"
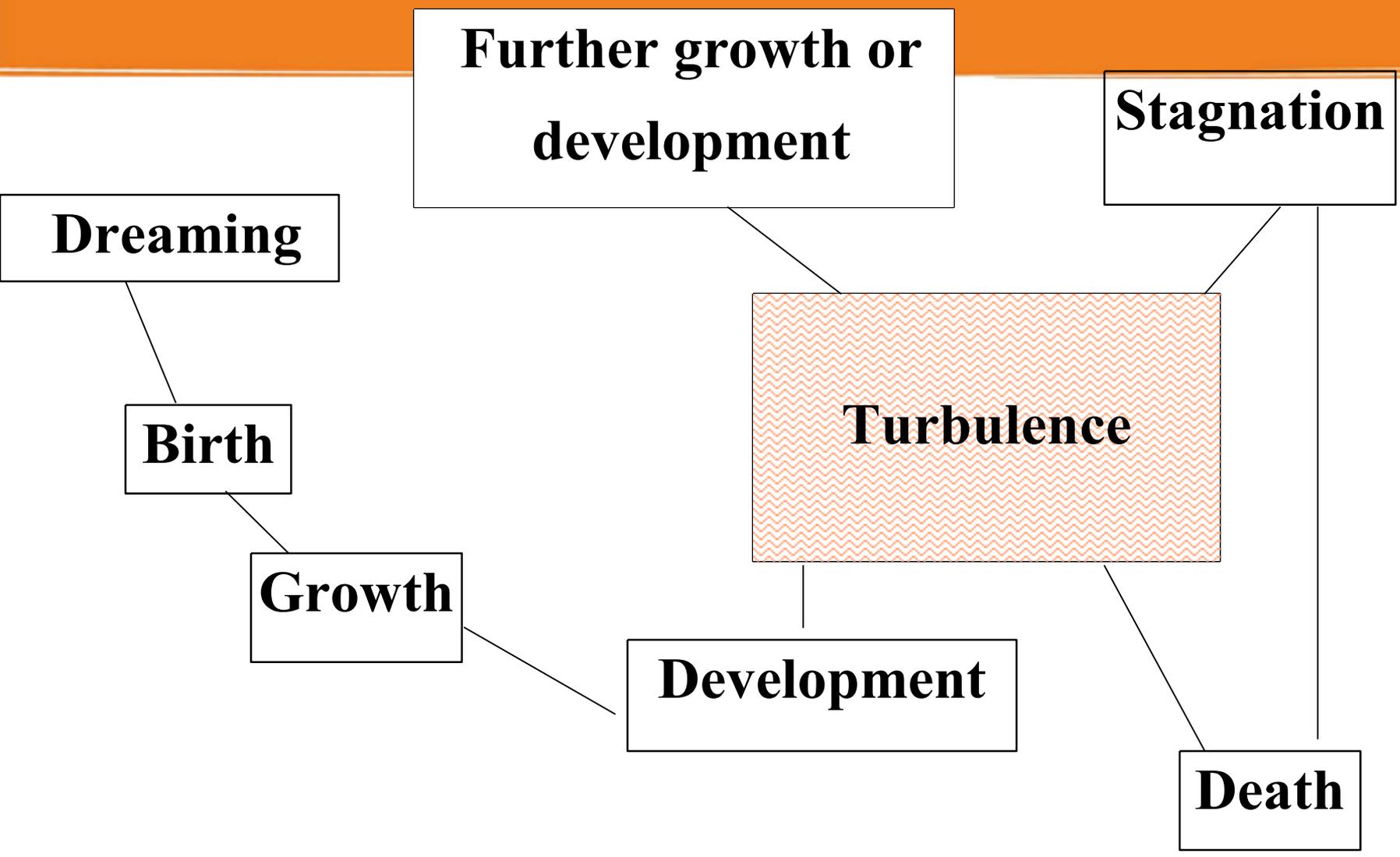
Albert Einstein

Assess Your Structure & Tools

- Mission
- Bylaws
- Policies & procedures
- Written information
- Committee structure
- Efficiency

Mission: the "What For?"

- Mission statement
  - Mission
  - Vision
  - Values
  - Methods

ASPCA®
THE AMERICAN SOCIETY FOR THE PREVENTION OF CRUELTY TO ANIMALS®

WSPA
World Society for the Protection of Animals

Your Mission - Guess Who

- To provide relief to the victims of disaster
- To organize the world's information and make it universally accessible and useful
- To make people happy
- To solve unsolved problems innovatively
- To provide effective means for the prevention of cruelty to animals throughout the United States

Have a Plan

- Self evaluation
- Strategic planning
- Board retreats
- Short term goals
- Minimum & maximum outcomes
- Document your efforts

Poor planning on your part does not constitute an emergency on mine

~ Sam Marsteller

It is better to have enough ideas for some of them to be wrong, than to be always right by having no ideas at all.

Edward DeBono

Elements for your success

- **Find someone** you don't know; introduce yourself
- Tell a **story** that describes **your organization or team at its BEST**
  - What happened?
  - Who was involved?
  - What was your role?
  - How did it feel
- As the listener- ask questions, dig into the story like a reporter –**looking for is the *root causes of success* ; why is this so good??**
- You'll have about 5 min per story – then **switch** roles – listening or telling
- Then, **analyze with your partner** the *root causes of success* to your stories – what factors does this group possess that made this possible?
- Jot down those "Success factors" (as few words as possible)
- When you're done – we'll create a list of those factors for success

Apathy can be overcome by enthusiasm, and enthusiasm can only be aroused by two things: first, an ideal, with takes the imagination by storm, and second, a definite intelligible plan for carrying that ideal into practice.

Arnold Toynbee

Recruit Diversity

- Term limits
- Old & new
- Involvement
   from all levels
- Stakeholders

Good to Great

&

Good to Great & the Social Sector

Jim Collins

Time and talent can often compensate for lack of money, but money cannot ever compensate for lack of the right people.

Jim Collins

Getting the Right People on the Bus

- The first step is who:
  - The right people on the bus
  - The wrong people off the bus
  - The right people in the right seats
- You can build a pocket of greatness without executive power
- These philosophies are more important for non-profits

All Aboard your Bus

Skills and professions to take your organization further

- Take 1 minute to think silently, and list some of the skills or professions you would like on your bus

- Work with your table to list 10-12 skills for your bus (10 min)

- Share your results and we'll fill the bus!

"It is a funny thing about life: If you refuse to accept anything but the best, you very often get it."

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W. Somerset Maugham

Fundraising Workshop

Caribbean Animal Welfare
Conference
Santo Domingo, Dominican Republic.

Sandra Monterose-ASPCA
Maximiliano Brandt-WSPA

April 22, 2008.
1:45 PM - 3:15 PM.

Donor Matrix/ Matriz del Donante.

| Donor Information Información Donante	Pyramid Pirámide	Technique, Resources, Values. Técnica, Recursos, Valores.	Principle of Fundraising Principios de Recaudación
(Name, occupation, donor of, financial situation, etc.) (Nombre, ocupación, donante de, condición económica, etc.)	(In what category falls) (En cual catergoría se ubica)	(Mix of values that represent them, in what area he/she feels donation should go, technique where he/she would feel more comfortable and org. fits) (Mezcla de sus valores, donde piensa que sus recursos deben ir y cual tecnica le es más comoda y que pueda proveer su organización)	(What principle best applies for this donor) (Que principio puede ser utilizado y que su organización pueda proveer)

* 32-country unweighted averages.

Figure 9 Sources of civil society organization revenue*

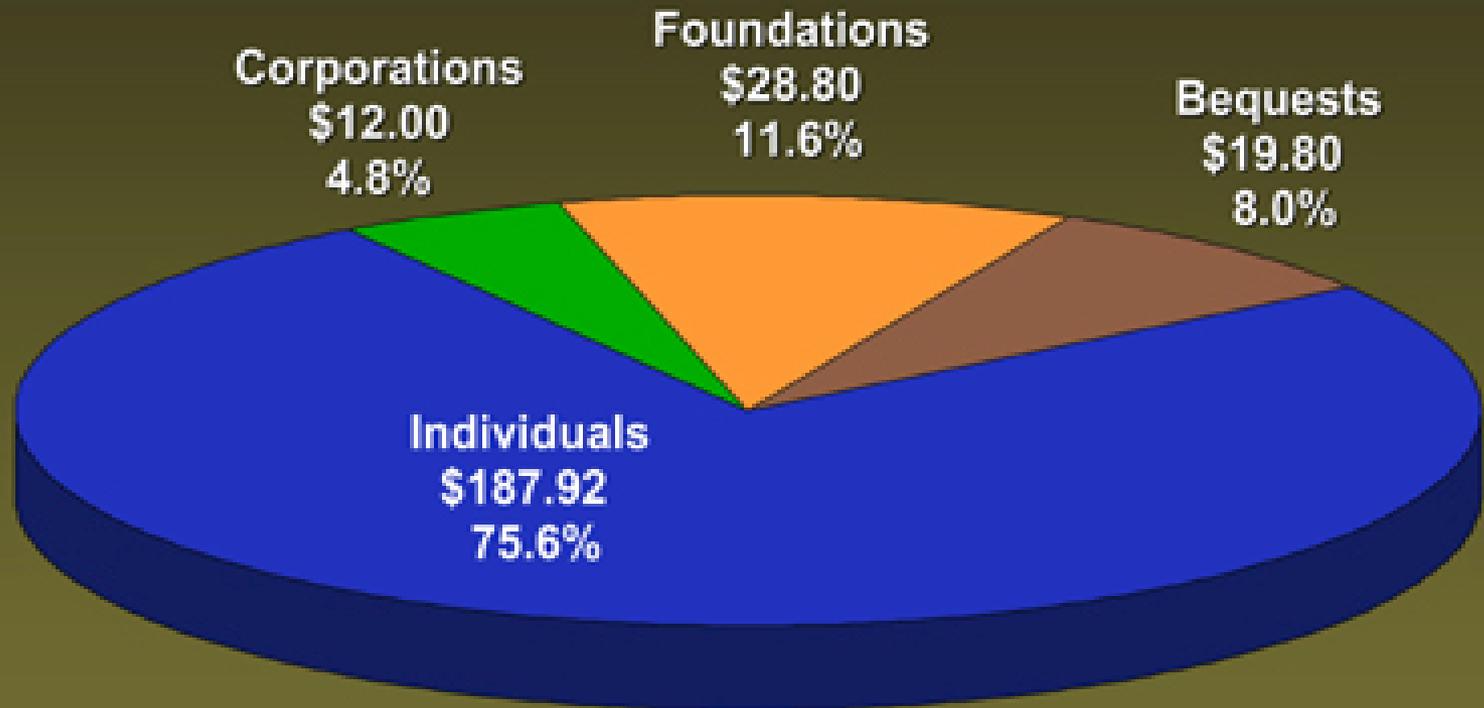*Source:* Johns Hopkins Comparative Nonprofit Sector Project

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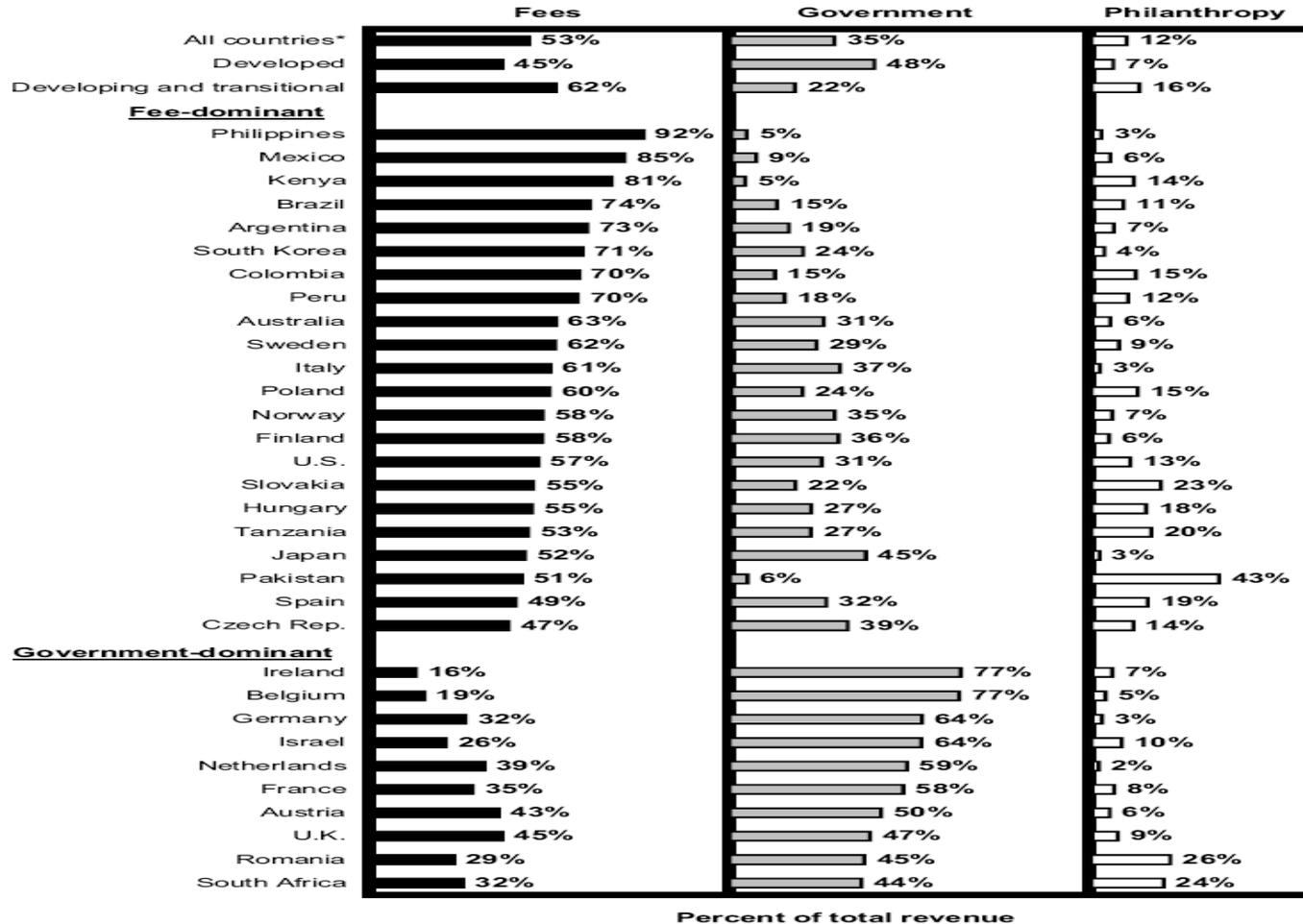
Sources

Figure 11 Sources of civil society organization revenue, by country
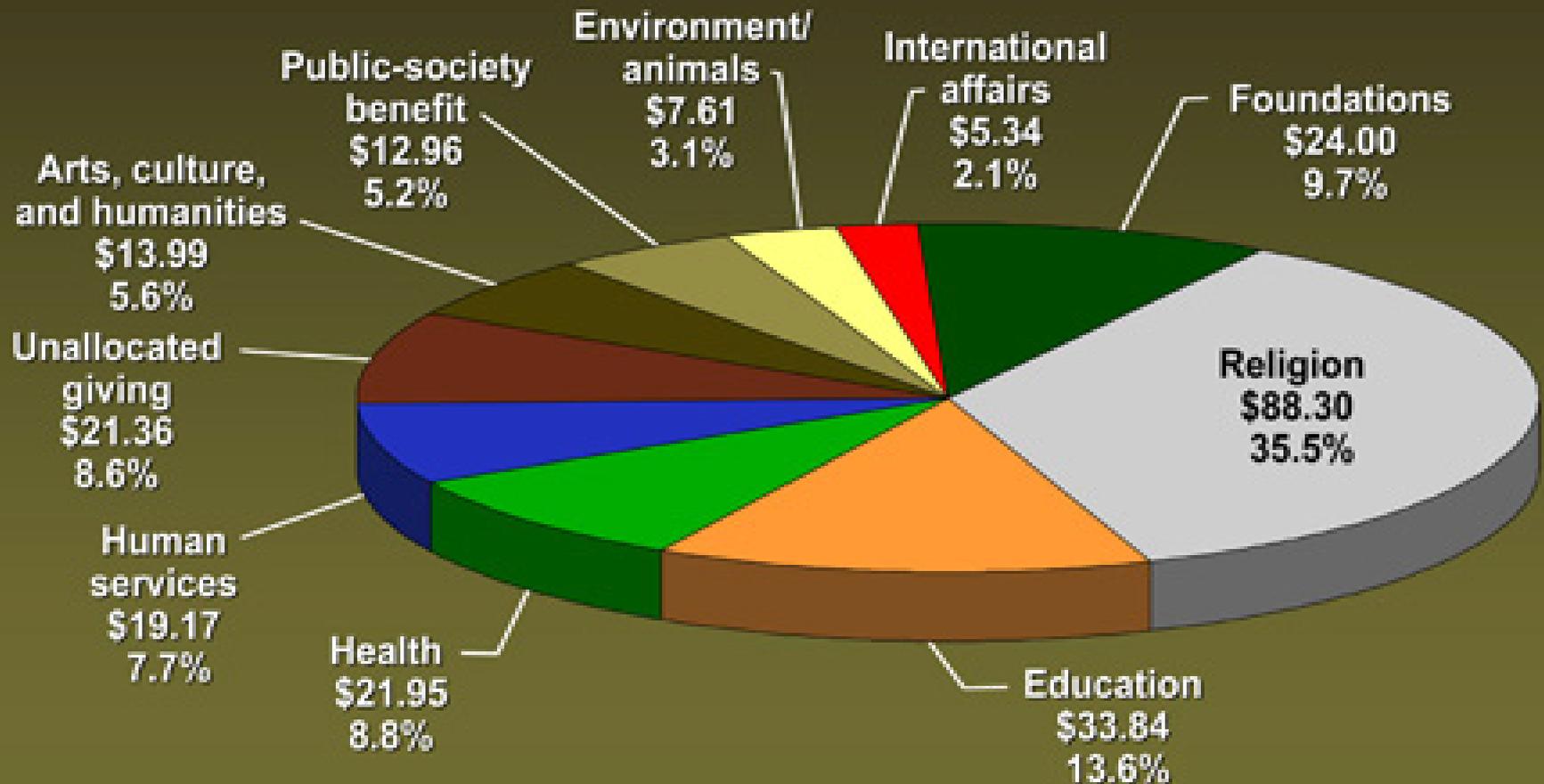*Source:* Johns Hopkins Comparative Nonprofit Sector Project

* 32-country unweighted average.

Sources

2004 CONTRIBUTIONS: $248.52 BILLION BY SOURCE OF CONTRIBUTIONS

Corporations $12.00 4.8%

Foundations $28.80 11.6%

Bequests $19.80 8.0%

Individuals $187.92 75.6%

Recipients

2004 CONTRIBUTIONS: $248.52 BILLION BY TYPE OF RECIPIENT

Public-society benefit $12.96 5.2%

Environment/ animals $7.61 3.1%

International affairs $5.34 2.1%

Foundations $24.00 9.7%

Arts, culture, and humanities $13.99 5.6%

Unallocated giving $21.36 8.6%

Human services $19.17 7.7%

Religion $88.30 35.5%

Health $21.95 8.8%

Education $33.84 13.6%

Source: Giving USA Foundation™ – AAFRC Trust for Philanthropy/Giving USA 2005

- Value: A belief people have about what is right or wrong, is important in life and controls their behavior.

- Examples: excellence, solidarity, honesty, efficiency, gratefulness, compassion, dignity, independence.

Cambridge Dictionary, 2006

What do you want to know about a potential donor before you ask for their support?

- What does the donor do, and how is he doing in whatever he does? What is his financial situation like?
- What does the person that will see you do? Specifically, does he/she have any decision-making power? What are his/her duties in terms of your request?
- What kind of organization or cause has he/she given funds to before?
- What is his policy for donations in kind?
- What are the amounts he typically donates? What is the largest donation/grant he has ever made?
- Does he have some kind of requirement or condition for donating (E.g., that the donation/grant be tax-deductible)?
- If your request is for a project, ¿Does the donor have any requirements such as a gender component, political independence, environmental conditions, accounting procedures, etc?
- How much are you going to ask for? (Always aim high).
- Aside from the requirements on the project itself, does the donor expect some other benefit as a result of his support? E.g. link to business image, some kind of public recognition, access to information, discounts, being able to influence on the organization's work. Determine in advance what he can be offered.
- Who is the person (or persons) usually making the decision to offer support? Who is/are the company owner/s?
- Who among those you know, has power to influence those who make the decision to offer support? For example, members of the company's Board of Directors, workmates, relatives, friends.
- How long do they normally take to decide on a request/application?
- What are their requirements to formalize the request/application? Is a letter enough? Do they have an application form? Do they offer some guidance for submitting proposals?

How can you obtain this information?

- From your own records. If you are not a new organization, you have already had collaborators. Study their records carefully. Find out who has given what and for what reasons. It is easier to obtain a "special" donation/grant from someone who has already contributed than from someone new.

- Friends within the lead's family, company or organization. If you don't have any "inside" acquaintances or friends, find out if someone else in your organization does. And if no one has friends, then make them! Be creative!

- In the case of companies and foundations check their annual reports, web sites and promotional literature on the organization or its products.

- Specialized magazines on your lead's activity sector. Some of these magazines might publish articles on the country's general situation, a particular activity sector, or even on your lead.

- Mass communication media. Be attentive about who is helping/sponsoring whom.

- Other NGOs the company has supported. In other words, characterize your competitors. Study their annual reports and any promotional literature for public use. It is to be expected that NGO annual reports should mention their donors, sponsors, and any other source of support. Some of them even rank them according to their contributions.

The Grant Triangle/Pyramid

Few donors. Only make one or a few, large donations
Very personalized techniques. E.g., will, requests

Intermediate number of donors. Medium-sized, but less frequent donations.
Personalized techniques. E.g. asset campaigns

Many donors. They donate little, but often.
Mass techniques. E.g. annual fund, fundraising events, direct marketing

Principles of Fundraising

1. Remain alert. Opportunities can only be seen when you are looking for them.
2. Giving is something personal.
3. People give to other people –not to good causes, but to people with good causes.
4. Fundraising has nothing to do with money. It has to do with a service or work that needs to be urgently delivered.
5. Fundraisers have to see things through the donor's eyes.
6. The most important things in life are tought through example. The best fundraisers are those who, before going out to ask for money, have given from their own pockets.
7. Procuring funds means procuring friends. And, it is not the same to do sales than to make friends. When it comes to fundrasining, donors and fundraisers are on the same side. On the other side are the world's needs.
8. Fundraising is 90% about planning, 9% about designing a proposal, and 1% about asking for the funds. Therefore, don't despair and do your work.
9. Somewhere from 85%-90% of the funds will come from 10%-15% of your sources.
10. We are in the business of inspiring people to contribute. In the words of Hank Rosso, "Fundraising is the delicate art of teaching about the joy of giving". Don't convince others. Inspire them.
11. We characterize problems and propose solutions. What is a good problem? That which is concrete, has a solution, is emotional, is relevant to the donor, and is pressing. What is a good solution?
12. Learn to use the power of emotions and the power of reason. Although it may requiere to and it may seem to be an informed choice, giving is an emotional choice. Open up the heart first. The pocket will open afterward.
13. Learn to ask. There is a time, a place and a person ideal for everything.
14. The most effective way of asking is face to face, from peer to peer, on the site of a project, and when the person asking for the funds has contributed ideas and funds to address the problem.
15. Opportunities will not come knocking on your door. You have to go out and look for them. Go where the donors are and learn to relate with them.
16. Fundraising is about recruiting honorable volunteers. The best technique is not a substitute for the credibility of a friend of a prospect.
17. If you ask a donor less than he/she was willing to donate, that is what you will get. Therefore, you should always aim high.
18. We are storytellers. The best fundraisers are fantastic storytellers.
19. Do not ever, ever, ever lie. Honesty cannot be faked.
20. There is no way of thanking too much. Thank a donor at least seven times before asking for his/her support again.
21. It is easier to obtain support from someone who has already helped than from someone new. If someone helps once, he will help twice. If he helps twice he will also help three times, and if he has contributed three times he will then increase his contribution.
22. It is easier to gain support from someone who already contributes to another cause than from someone who has never contributed to anything.

Ken Burnet, 2002. The Essential Foundations of Great Fundraising. In 2002 International Conference on Fundarising. St. Louis, Missouri. April 14-17, 2002. *A Compilation of Educational Session Reference Material*. Association of Fundraising Professionals. 1101 King St. Suite 700, Alexandria, VA. 22314-2967. USA. Web site: www.afpnet.org

FUNDRAISING TECHNIQUES

Fund raising Techniques	Advantages	Time Needed for Results	Investment -- $ & Staff- -	Conditions Favoring Success	Possible Approaches	Risks
Annual Fund or Membership Dues: Donors support the organization in general. Typically they are assigned to different categories depending on amount donated.	1. Bringing unrestricted or non-allocated funds. 2. Flow of income and expenses is somewhat predictable. 3. Having many different donors is convenient in terms of public pressure or mass support.	4-7 years for stability; although results should be palpable within one year.	Moderate. At least one fulltime professional.	1. Good image (not essential). 2. Access to automatic charges (credit card or payroll deduction).	1. Direct mail. 2. Telephone (making phone calls) 3. Telephone (receiving calls aided by advertising). 4. Face to face in public places. 5. Face to face in personal visits.	1. Losing money in the process, whether because of difficulties in tracing it electronically, or because money passes through several hands. 2. Competition with specific projects within the organization itself.
Major Donors Looking for major grants (as defined by each org.), among the organizatioÕs historic files or in the market (acquisition) through referrals.	1. Substantial donations/grants. 2. Flexible allocation (from operating funds to specific projects). 3. Previous relation or referrer allow for fast results.	1 year if there is a large, long-standing database.	1. Depends on database quantity & quality.	1. Having a large, good quality database. 2. Moderate sized-projects. 3. A large group of quality referrers.	1. Face to face in personal visits.	1. Donor preference for specific projects may cannibalize annual fund.
Special events Activities where advance payment is required to attend, and in exchange they are	1. Flexible allocation (from operating funds to specific projects). 2. They help promote the organizatioÕs	1. From a few weeks up to years, depending on magnitude	1. Highly variable financial investment. 2. Staff investment is also variable Š	1. Almost obsessive planning. 2. Making it a recurrent, specialized event. 3. Having a broad group of friends sell	1. Face to face personal visits before the event. 2. Selling tickets in advance by telephone, online or at public sites.	1. Diversifying objectives in an improvised manner (can lead to disaster). 2. Inappropriate design in terms of timing and the way people will

Special events Activities where advance payment is required to attend, and in exchange they are offered something nice, something exciting, something educational, or all of the above. **Special events (Cont.)**	1. Flexible allocation (from operating funds to specific projects). 2. They help promote the organizationÕs ÑcauseÓ and image. 3. They allow organization to nurture leads and donors. 4. Some of the costs or attractions may be covered/ obtained through in-kind donations.	1. From a few weeks up to years, depending on magnitude and complexity of the event.	1. Highly variable financial investment. 2. Staff investment is also variable Š from part-time volunteers to a whole full time army. 3. Demand for attention goes on rising curve until reaching a highly demanding peak.	1. Almost obsessive planning. 2. Making it a recurrent, specialized event. 3. Having a broad group of friends sell event tickets. 4. Arranging for costs to be covered and tickets to be sold in advance of event.	1. Face to face personal visits before the event. 2. Selling tickets in advance by telephone, online or at public sites. 3. Charging tickets at the event. 4. Asking for either anonymous or public donations during event.	1. Diversifying objectives in an improvised manner (can lead to disaster). 2. Inappropriate design in terms of timing and the way people will make their contribution.
Asset campaigns Set of coordinated techniques used to buy or improve ÑassetsÓ (e.g. properties, trust funds).	1. Raising huge amounts of money. 2. Finding out and building relations with major donors. 3. Generating great institutional momentum and public image.	3-10 years depending on campaign size.	Significant investment in terms of money and human resources.	1. A highly persuasive cause or ÑcaseÓ. 2. An adequate group of referrers in terms of quantity and quality. 3. An adequate number of leads interested and capable of donating (according to study on perceptions). 4. Leadership and	1. Face to face (peer to peer). 2. Direct mail. 3. Events 4. Others	1. Losing the drive or enthusiasm due to wearing down or losing focus. Important: Asset campaigns should not be taken lightly. Be well informed before launching one.

FUNDRAISING TECHNIQUES

Differed and will grants/donations . Grants/donations stipulated in a will or in "financial products" that render fiscal benefits or allocate the funds gradually over a period of time.	1. Bringing major grants/donations. 2. Property donations are frequent. **3. Advance income planning.**	**3-10 years or more.**	Moderate financial investment. Calls for personalized, long-term attention to leads and donors.	1. That leads for this type of grant may have already donated and are satisfied with the organization's work. 2. Finding leads of an adequate age and financial position to consider their legacy.	1. Personal visits also attended by referrers who are highly respected by leads.	1. Unclear or inadequate legislation or financial options.
"Grants-manship" Obtaining grants from professional support sources (foundations), governmental agencies, other welfare organizations, and even the business sector through project design and negotiation.	1. Mobilizes funds for specific projects of variable sizes. 2. Forces all parties involved to thoroughly plan where and how money will be spent. 3. Project design typically results in less cases of inadequate use of resources.	3 mths-3 yrs. It may take a few weeks for business sector to respond. Multilateral agencies take years.	Moderate investment. At least 1 person skilled in writing proposals, browsing the Internet and building good interpersonal relations.	1. Capacity for project design and implementation. 2. Good contacts among circles influencing or approving resource allocation. 3. Having the means to be up to date about this sector's preferences and conditions.	1. Visiting donors or inviting them to the project site. 2. Phone calls 3. Mail (letters exploring their interest).	1. Priorities of this market are changing. Therefore, it is not a reliable source for the long term. 2. Support on a project basis can create uncertainty about jobs and lead to oversized organizations (in terms of infrastructure, equipment and salaries) that are unable to keep up with the pace or even survive after project completion.

Sponsorship						
Sponsorship Leads are invited to cover a (previously defined) cost specifically, whether only once or on a permanent basis. E.g.: Sponsoring a child, an elderly person, a project's unit, paying for a construction meter or a hectare of forest.	1. Allows for major initiatives to be divided into parts with affordable costs. 2. Projectable income. 3. Usually the subject of sponsorship is appealing and easy to understand. 4. Recruiting many sponsors dilutes the effect, as some of them do not stay as regular sponsors. 5. May include either project or organizational administrative costs.	4-7 years for multilateral agencies to reach stability. However, good results should be seen within a year.	Moderate to high. Production of information on the subject of sponsorship can be time-consuming and require significant resources.	1. Good organizational image. 2. Use of celebrities endorsing the cause, the organization or the subject of sponsorship. 3. Subject of sponsorship should be easy to understand, emotionally appealing and/or pleasant.	1. Regular mail 2. T.V. advertising with phone call reception service. 3. Face to face contact in various modalities.	1. Because these donations are specifically allocated, there is the risk of underestimating and not setting up an information system adequate to manage so many donors and "sponsorees"

Donor Matrix/ Matriz del Donante.

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