

Advocacy

How to utilize your leadership skills and the Apra Advocacy Tool Kit to advocate for prospect development and research in your work place and for your profession!



CANADA CONFERENCE

OCTOBER 17-19, 2018

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SESSION DATE: Weds. October 17, 2018

SESSION TIME: 2B, 1:45

Acknowledgements

- Apra Advocacy Committee
 - Misa Lobato
 - Assistant Vice President of Advancement Strategy, University of Colorado
 - Apra Advocacy Committee, Board Liaison
- Apra Advocacy Toolkit (2017)
 - <http://www.aprahome.org/p/cm/ld/fid=1014>

Agenda

- **Who is in the room?**
- **Why a Toolkit?**
 - Because we need it!
- **What is the value of Prospect Development?**
 - Show them the money (and numbers)!
- **How do I advocate for Prospect Development?**
 - Self, team, profession
- **Who advocates for Prospect Development?**
 - Leaders do – be a leader!!
- **When or where to advocate?**
 - Anywhere and everywhere!

Who is in the room & why are you here?

- Please go to www.menti.com and enter the code: **29 97 72**

Who is in the room & why are you here?

- **How many years have you worked in prospect development?**
 - < one year / 1-3 / 4-10 / 11-20 / over 20 / I don't work in prospect development
- **What is the size of your fundraising shop?**
 - Only me! / 2-5 ppl / 6-10 / 11-20 / Over 20
- **Do you currently lead a team?**
 - Yes / No
- **Do you lead regular prospect development or FD meetings?**
 - Yes / No
- **Are your research development activities linked to revenue?**
 - Yes / No / Not sure
- **Are you a member of another FD association?**
 - AFP / AHP / CAGP / Regional Group / Other / No, I am not a member of another association
- **What words would your co-workers use to describe you?**
 - Up to 5 entries
- **What brings you to this session?**
 - Open text – can add more than one answer

Why a Toolkit?



Because we need it!

- Apra and Prospect Development is only as strong as its members
- Our profession is hard to define – what is your job title?
- Every time you tell your boss what you've accomplished, when you've asked to be included or lead a meeting, or advocate for a raise, you help the movement (of the profession).
- Help create the standard for all organizations.

What is the Value of Prospect Development?

Show them the money and the numbers!

- Fundraising is data-driven and gift officers are measured by their metrics – so too should Prospect Development professionals.
- The impact and importance of Prospect Development professionals can be difficult to quantify.



Management Metrics vs Value-Added

Management Metrics

- How can we distinguish between key performance indicators (KPIs) and outcomes that truly drive fundraising?
- While you may track the number of profiles written, portfolio meetings held, modelling projects, and average response times – how do these impact the bottom line?
- What are the outcomes?
- We must move from anecdotes and KPIs to data-supported evidence.

Management Metrics vs Value-Added

Value-Added

- Consider these examples:
 - In FY2014, your team identified 200 new prospects. Capacity added to the prospect pool was \$10M. In the 24 months following FY2014, 40% of those prospects were assigned and 15% solicited. \$3M was raised from these prospects in this timeframe, directly (not solely) attributable to your team. Prospect development raised: \$3M
 - In FY2015, you performed 20 in-depth capacity ratings for principal gift solicitations. In the course of this work, you increased ratings by a total of \$18M. Twenty five percent of the solicitations were funded at the ask amount, including \$2M raised directly attributable to your efforts. Prospect development raised: \$2M

Hey! Have you ever seen a resume for a Major Gift Officer?
It's all about dollars raised and total campaign dollars – you can do that too!

Setting the Stage

- Of course, you know I'm going to say it – if it's not in the database it didn't happen – and that means for **YOU** too!
- Track all of your research in the database and you can follow the constituents from identified → donor and link your activity to revenue.
- But consider too what role do you play within your fundraising team for effective fundraising?
- How can YOU improve THEIR efficiency and effectiveness?

Setting the Stage

- Consider these examples:
 - In Q2 you created stage-aging reports and spent 10 hours meeting with gift officers for portfolio reviews. At the close of Q4, portfolios are closer to desired balance, over 200 prospects have moved stages or been dropped, and time-to-solicitation has decreased to an average of 22 months for major and principal gift prospects.
 - Your predictive model for planned giving has identified over 2,000 prospects. The planned giving officer now has a pool of prospects to cultivate, and annual fund mailings to these prospects will feature planned giving.
 - This year you utilized data appends for contact information and manually searched for lost alumni. 85% of assigned prospects now have a phone, email, and address on file, and your lost alumni rate has decreased from 16% to 11%.

Hit 'em with an Impact Report

- Prospect Development Impact Reports include:
 - **Inputs**
 - Prospect Development Staff
 - Budget
 - **Outputs**
 - KPIs
 - **Outcomes**
 - Prospects and dollars attributable to the Prospect Development Team
 - Environment for engagement for the Fundraising Team

Example: Prospect Development Impact Report

Prospect Development Impact Report FY18

Inputs

Staff: Director, analysts (2), coordinator

Budget: \$XX

Outputs

000 prospects identified

000 in-house capacity ratings

000 prospect evaluations

000 solicitation profiles

000 event bios

000 relationship maps

000 portfolio review meetings

000 predictive models

000 patrons screened for major gift capacity

000% of comprehensive screening reviewed

000% of prospects have affinity scores

Outcomes

\$000 raised from prospects identified in leadership annual gift model

\$000 in additional capacity added to prospect pool through proactive prospect ID

\$000 raised from prospects identified by prospect development

\$000 raised from event attendees recommended for follow-up

Portfolios are on average 000% of target size and 000% of target composition

000% of assigned prospects and 000% of pending prospects have contact information

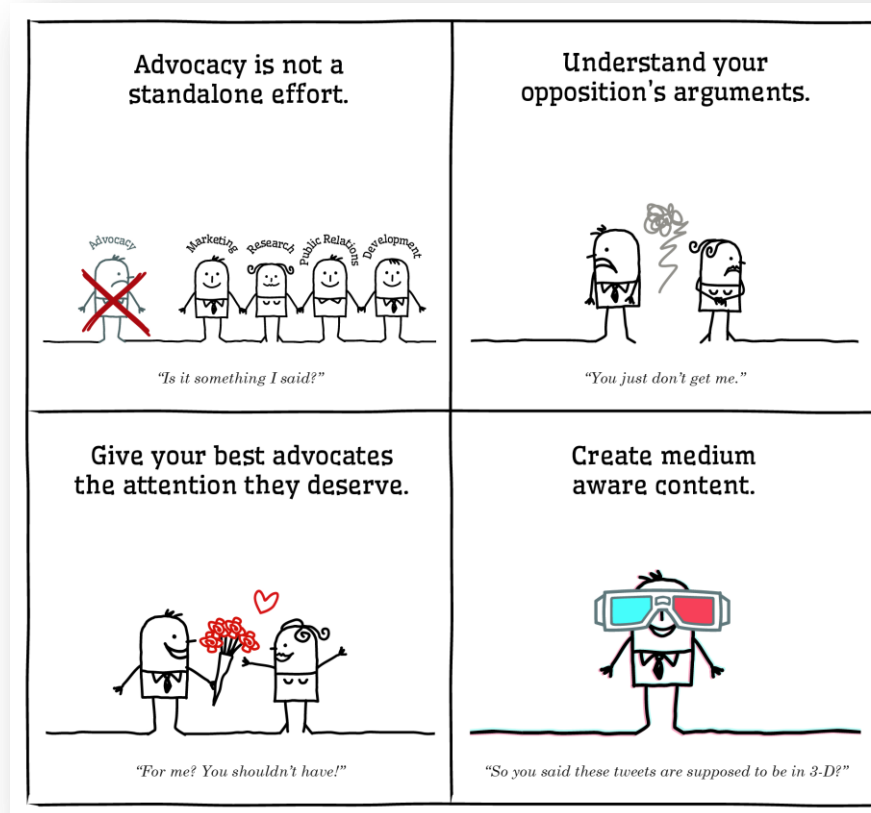
For more Prospect Development Metrics

- Apra Canada Conference
- Thursday, October 18th @ 11:00 a.m.
- **Inconceivable! Or Maybe Not: Developing Metrics for Prospect Management**
 - Bond Lammey, Managing Associate, Bentz Whaley Flessner
 - President Elect, Apra International

How do I advocate for Prospect Development?

Triple Aim

- Self
- Team
- Profession



Levick Communications, 2015

Self-Advocacy

- **Help your colleagues understand the complexity of Prospect Development**
 - I always start with a good ole “Lunch & Learn” – if you feed them, they will come
 - Share a copy of Apra’s [Body of Knowledge](#) outlining the various sectors within the field and help define skills and future path
 - Develop an elevator speech
 - Provide your boss and team with interesting articles from Apra [Connections](#) or [Apra Canada Scoop](#)
 - Use the *Body of Knowledge* to assess your own strengths, what you have mastered and what you need to do to get to the next level of expertise
 - Invite the Fund Development team to a free [Apra Chapters Share the Knowledge](#) (Feb)
 - Identify your own “champions” who can talk about the value of your work and advocate for you
 - Cultivate a peer network to help your strategize to elevate your exposure

Advocate for the Prospect Development Team

- Good old “Lunch & Learn” – Prospect Development Pizza Anyone?
- Create a charter to outline your services, identify your scope, and the impact of your work – and training documents and policies to reflect these
- Explain why you have different levels of services that inform decisions and strategic actions throughout the cultivation cycle
- Make a case for additional staff – use the Body of Knowledge to identify gaps in services – and the Salary Survey to demonstrate appropriate compensation
- Advocating for an increase in professional development for your team – develop a plan that will address the highest priority areas related to the knowledge gaps on your team

Advocating for your Profession

- Volunteer for Apra to develop stronger educational programs and resources
- Present at Apra (and other association conferences) to promote best practices in Prospect Development
- Recommend that your Apra Chapter develop partnerships and shared educational offerings with local AFP chapters (and other associations)
- Write and Tweet about Prospect Development
- Submit Prospect Development work for awards (AFP International Research Council)
- Nominate peers and colleagues for Apra awards to promote excellence within the profession

Who Advocates for Prospect Development?

Leaders Do – Be a Leader!!



How do you define leadership?

- What qualities do leaders display?
- What do leaders do?
 - Leaders speak and act on behalf of themselves and others
 - Leaders take action
 - Leaders advocate

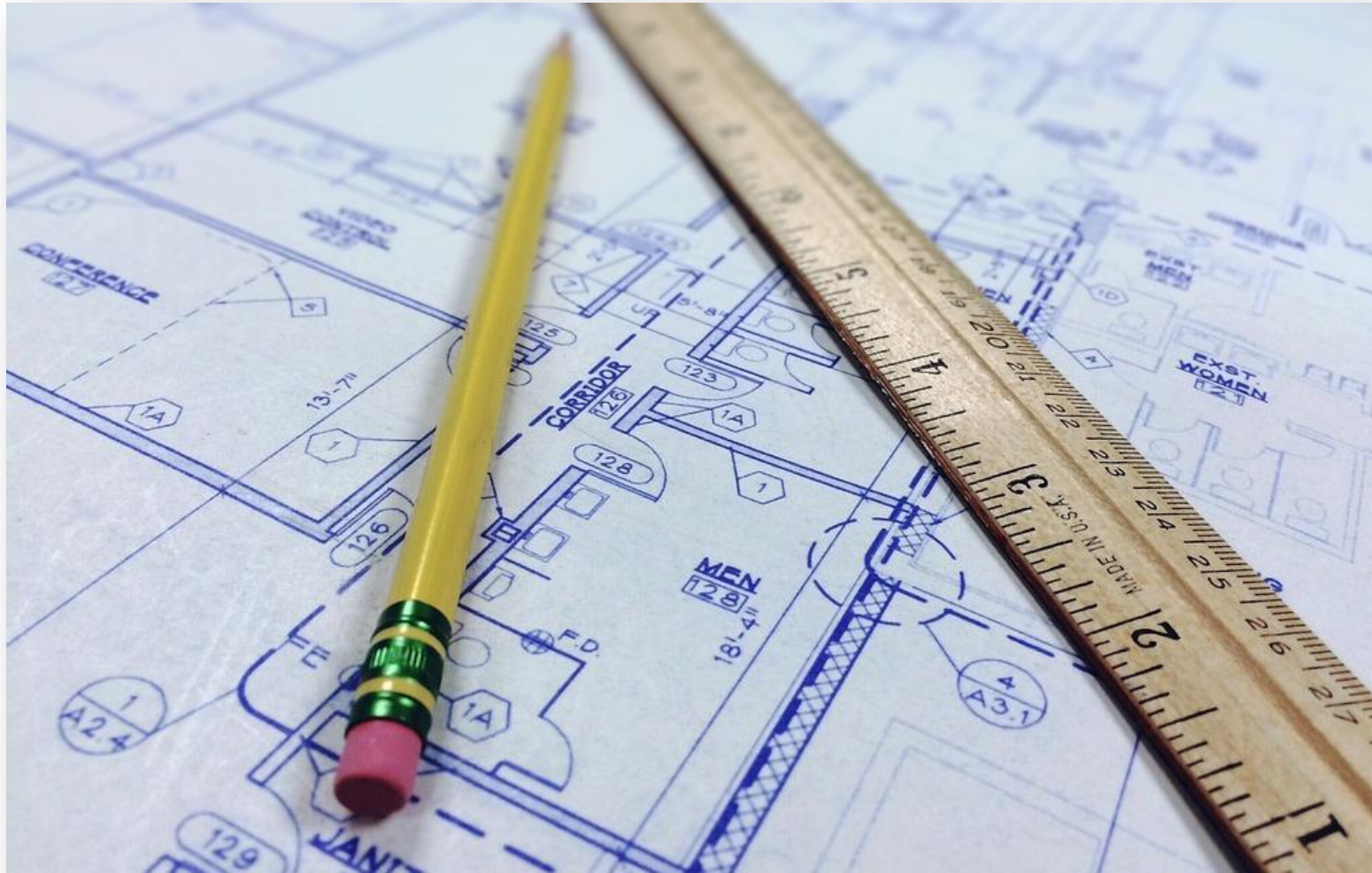
Who leads?

- Leadership isn't a specific role or title
- Leadership is an approach and a practice that involves taking action and influencing outcomes
- Anyone can lead – regardless of your experience or role in your organization

If your actions
inspire others
to dream more, learn more,
do more and become more,
you are a
LEADER.

Leadership = Advocacy = Action

- The best leaders are those that know how to **advocate** for themselves, their peers/colleagues, and the systems/processes they are supporting or advancing.
- So, if leadership is about advocacy, and advocacy is about taking action, then we need a plan of action.
- Leaders have a plan.



Leaders have a plan.

A Leadership Plan

1. Analyze the Problem
2. Gather Information
3. Assess & Consider All Possible Solutions

Sound familiar? – Prospect Development professionals do this every day!

- Due to the nature of our own roles, the data we work with, and the diversity of people we interact with on a daily basis (fundraisers, managers, leadership, IT, HR, etc.), we are ideally situated to identify and assess problems.
- We excel at gathering information! It's what we do.
- We must simply choose to **ACT**.

Leaders ... Analyze the Problem

- What is the problem, issue, process, initiative, or agenda, I'm trying to advance?



Keep your issues separate.



Pick your battles.



Keep your issues separate.

- There will be no shortage of issues to tackle.
- This is especially true if you are new to your role, team, or organization.
- You may be tempted to try to fix everything at once.
- While it's fine to define and address multiple issues at once, you should consider completing a separate plan for each problem or issue.



Pick the battles you want to fight.

- Not all problems can be solved or easily resolved.
- You may to decide to NOT address all of the problems (that's okay).
 - Think of your sanity, and which problems will make you and your team more efficient.
- Pick out the problems that are the most important to you and address those first.
- Think about having clearly articulated goals – not just for communication with others but also for testing assumptions and outcomes throughout the process.
 - **A written goal keeps you on track!** – See Prospect Research in Canada book! 😊

What facts do I already know?



Juicy facts you may *not already* know:

- The national animal of Scotland is the unicorn (fact courtesy of Misa Lobato)
- Saint-Louis-du-Ha! Ha! is the only place in the world to have not one, but two exclamation marks in the name (Huffington Post)
- The Canadian government has declared Santa as a Canadian citizen. You can mail your letter to the North Pole in any language and elves will answer them all (~1.5 million)! (HuffPost)
- This involves recalling what you know about the situation and outlining the events of what has happened to date.
- This may also involve talking with others in your organization.
 - What is the context of how this problem, initiative, or issue evolved?
 - What solutions were attempted or proposed in the past that didn't work?

Leaders ... Gather Information

- **What information do I need?**

- You will need a clear understanding of the facts and context and what you need to gather.

- **How can I get that information?**

- This may include cultural or historical ways of doing things.
- And, internal policies and rules.

- Remember “guidelines” are just that, a good leader knows when another perspective may be more effective.

Pay attention to the “social forces” at work



- The best leaders develop a keen understanding of the social forces at work within their organizations, and then tackle the issues and challenges from the inside out.
- You cannot ignore these internal social forces (e.g. preferences and social expectations).
- Don't be the “bull in a china shop”.

Influence

- Who are the decision-makers I need to influence to solve this problem?
 - Can you go straight to the decision maker in your organization and have the problem solved right away?
 - If you don't know who has the authority to make a decision – ask!
 - Advocating for yourself and your team members takes effort.
 - As with solicitation, how can you cultivate your portfolio of influencers?
- Are there other people who can help me develop influence?
- How do I cultivate them?

Influence

When considering influence, consider three types:

- 1. Literal authority:** an individual who has the title or position to make decisions and/or direct others to act.
 - e.g., your boss
- 2. Expertise:** an individual who is known as a subject-matter expert and is often sought after for input and guidance.
 - e.g., that awesome IT guru who has been there 20+ years!
- 3. Relationship:** an individual who has the ability to connect you to others
 - either directly within your organization, or with others outside of your organization who in turn can influence those within your organization – once again, it's all about linkages



Mark Egge (President, Apra)

Senior Manager, Prospect Development, Greater Twin Cities United Way

- 2016 Apra Talks: Leadership & Networking: Friends in Work Places
- “Hi, I’m Mark Egge and .. I hate people” – 10 years ago
 - When he started at the United Way he was tasked with having to create a relationship management program but knew that he didn’t have a great title, nor a long history of expertise at the organization. So he realized in order to get the project done, he had to create a network of people within the organization who could help carry the project forward.
 - He had to learn to network and be a leader in order to be successful in his goal.
 - @ 22 minute mark on YouTube: <https://www.youtube.com/watch?v=j98y90uGNCK&t=1s>

Leaders ... Assess & Consider All Possible Solutions

- What are some possible solutions to this problem?
- What are some barriers to these solutions?
- What do I expect others to do?
- Consider what you want to happen: consult others but make up your own mind.

- Benchmarking:

- Many organizations look to see what other organizations are doing and it is still a strong tool for gathering information, *but* ultimately what will work best for your organization?
- What do you want to do but have been unable to implement?
- *Innovative solutions* come from trying something *new* ... not doing what others have done in the past.



Are you willing to accept alternative solutions?

- You might be able to score a partial victory even if you don't obtain your ideal solution (“don't throw the baby out with the bathwater”)
 - Are you okay with this?
 - Ask yourself in advance if there are alternatives you would be willing to consider?
 - This helps you anticipate the reactions of others and of yourself.



Identify Your Allies

- Who are the people who will be your allies in resolving or advancing your advocacy efforts?

Build Your Case

- How will this impact your team or organization for the better?
- What will those who you're trying to influence benefit from resolving the issue and supporting your initiative?
- Acknowledge the viewpoint of those who you're trying to influence while you are advocating for your proposed changes. This shows you appreciate their needs.
 - Acknowledge and address barriers.
 - Anticipate reactions along the way and plan in advance.



Plan Your Strategy

- Don't try and plan your strategy alone. Remember your allies!
- Consulting with others will help you be more effective and also see your own blind-spots.
- Delivery of the strategy is important:
 - Plan how you are going to phrase your words
 - Develop a concise story about what you need
 - Confer with a few colleagues to see if there is something that is not clear
 - Make a "solicitation plan"

Remember: A Leadership Plan

1. Analyze the Problem
2. Gather Information
3. Assess & Consider All Possible Solutions

Sound familiar? – Prospect Development professionals do this every day!

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- We must simply choose to **ACT**.

When or Where to Advocate?

Anywhere and everywhere!

- Develop an “elevator speech” (e.g., the idea of the what you would say to someone about yourself in the time it takes to go up an elevator), so:
 - No longer than 30 seconds
 - No longer than 80 words
 - 3 to 5 sentences



Elevator Speech Outline

- 1. About you**
 - Describe yourself and your team – enthusiastically!
 - A statement/hook: “I save lives” (Janet Turner)
- 2. What you offer**
 - What problems you have solved?
 - Why you are interested in your listener?
- 3. What are the benefits?**
 - What sets you apart?
- 4. How do you do it?**
 - If I told you that, I’d have to kill you!
 - Give an example or a short story – show your uniqueness!
- 5. Call for action**
 - What is the most wanted response after your elevator speech?
 - Do you want to be seen as an expert in your field?



Don't let this be you with your boss – especially if he is your Father!

Example Elevator Speech

- **Liz Rejman, Associate Director, Fundraising Operations, Pathways to Education**
- Liz's own *professional* pathway to success:
 - Marketing Director, Orchestra London (1994-1998)
 - Associate Director, Alumni Relations, Huron University College (1998-2009)
 - Development Researcher, London Health Sciences Foundation (2009-2013)
 - Head of Development, Museum London (2013-2014)
 - Database & Research Manager, Pathways (2014-2016)
 - **Associate Director, Fundraising Operations, Pathways (2016 to present)**

Example Elevator Speech

- **Liz's *volunteer & other activities* pathway to success:**
 - Chair, Conference, London Region Fundraising Professionals (LRFP) (2010-2011)
 - Instructor, Prospect Research (online), Georgian College (2010-2013)
 - Instructor, Technology in the Not for Profit, UWO Continuing Studies (2009-2013)
 - Director, Apra Canada (2011-2013)
 - President & Past President, LRFP (2011-2012)
 - Co-Chair, Apra Canada Conference (2012-2014)
 - Director, Apra Board of Directors (2013-present)
 - **President, Apra Board of Directors (2017-2018)**
 - ... not to mention committees!

Liz's Example Elevator Speech

- Cheeky one-line elevator speech:
“I am a knowledge connector, policy dominatrix, database queen, and general sass master!”
- Professional, slightly cheeky elevator speech:
“I highlight the awesomeness of fundraisers by generating insights, metrics, and intel from data that they (correctly) add in our database!”

Important Areas in Liz's Elevator Speech

- No mention of # of profiles generated by her or her team

BUT

- Does mention:
 - Knowledge connector
 - Policy & Task Master
 - Insights
 - Metrics, Data & Policy go-to
 - Works with and highlights the *awesome* fundraisers

Some Resources

Apra International

- Apra's [Advocacy Toolkit](#) (for more detailed information)
- Apra's [Body of Knowledge](#)
- [Apra Podcast](#) (Hey Advocacy!)
- [Apra Talks: The Power of Networking](#)
- Franzino, Suzanne - [Be the Change: Opportunities for Leadership and Change Management](#)
- Howley, Lisa - [The Prospect Development Office as Agents of Change](#)
- MacCormack, Jennifer - [Creating and Managing Change with Kaizen](#)
- MacCormack, Jennifer - [Being an Intrapreneur](#)

Apra Canada

- *Prospect Research in Canada: An Essential Guide for Researchers and Fundraisers*. Tracey Church & Liz Rejman, editors. Civil Sector Press, 2016.

[Hilborn Civil Sector Press](#)

[Amazon.com](#)

Questions

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