

Hit the Ground Running

Fundraising Priorities for New Executive Directors

By Judy Levine

THE FIRST 18 MONTHS of a new executive director's job are both a crash course and a honeymoon. So much to learn—both spoken and unspoken. So many customs to uncover, relationships to navigate, and pathways to unearth. Yet at the same time, so much good will and so many people pulling for the new director to succeed.

It's a unique moment for a leader and can set the tone for the rest of the executive director's tenure. It's also a critical fundraising juncture in which funders' doors widen (albeit slightly), creating a window of opportunity not to be missed.

What follows is a primer of fundraising tips for new executive directors, especially those without a background in fundraising. Congratulations: You are now, no matter what your title or experience, the fundraiser-in-chief. Read these tips, put into action what you can manage (given everything else on your plate), and go forth and conquer!

Build Relationships With Your Supporters

Book a listening tour: Early on your schedule as a new executive director is a listening tour. See your organization through the eyes of others. Use your arrival to rekindle old relationships, air out unstated sentiments, and just thank people for their support as you take the helm. Whether you travel out of town or simply out of the office, use your first six to 18 months to meet face-to-face with everyone significant to your nonprofit.

By meeting, you are showing respect. You signal the importance of these acquaintances to the agency. They will be happy to meet you as the new kid on the block and take your measure—even if they would not have thought to catch up with your predecessor. Even funders who have no intention of supporting your organization—or think they don't—will likely see you, giving you the chance to start a dialogue that, in time, might go to unexpected places. As a “new” director, you can keep this listening tour going for a full 18 months!

Ask questions: Being a newcomer gives you the right to ask questions, so take full advantage of that. You can get donors to



Executive directors at work, from top left clockwise: Jasmine Nielsen, Just Food; Chitra Aiyar, Sadie Nash Leadership Project; Grace Shim, Minkwon Center for Community Action; and Keith Little, Edwin Gould Services for Children.

explain things to you like why they give or how they introduce the organization to their friends. You can test ideas and approaches to figure out what and why people might give. If you show them you are in learning mode and value advice, people will open up and tell you (almost) everything you need to know to create your next fundraising plan.

Fix past mistakes: Being new gives you the chance to fix things that were done wrong in the past. For example, you might tell a donor: “I realized from going through the records that you haven't heard from us in over two years, and you've been such a stalwart supporter. I'm reaching out because I wanted to say thank you and make you one of the first people I connected with.” What a golden opportunity!

Ask for advice: The old fundraising adage is true: “Ask for advice, you get

money. Ask for money, you get advice.” You're new, so ask everyone, especially donors/funders, for their advice. This gets them more invested and creates the perfect opening to go back later and show them how you have used some of their suggestions.

Look for friends in unexpected places: For example, don't forget your vendors in this process—the more they feel part of the family, the more they will come forward at event time to buy a table or serve as an honoree. Use your “newness” to deepen your organization's relationship with those who normally just send you an invoice.

Fundraising Culture

Culture of Philanthropy: Lay the foundation for an organization-wide embrace of fundraising right from the start. Make sure everyone knows that fundraising—and friend raising—is the entire team's job, not just that of the fundraising staff. Set a very public example of this yourself, in your first weeks. One idea: Host a small gathering at a bar or home specifically for friends of staff to learn about the organization's work.

Ask from day one: Ask the organization's most loyal donors to make a special gift in support of your priorities. Start with your board members, who have a vested interest in seeing you succeed

(see below). Consider asking for matching or challenge grants to inspire some additional reach.

Create a wow factor: Get a buzz going about fundraising early on. You have to act in ways that announce an exciting difference. Master your own version of the elevator pitch. Signal your awareness of how the new dollars you plan to raise can energize your programs and will benefit both clients and staff. Create an early fundraising “win” by highlighting a few key, but achievable, goals that build on the group’s assets and get people really motivated to succeed. Then celebrate and share the credit for that win with everyone involved.

Partnership with the Board

Activate the board from the start: Looking for a new executive director is a scary, exciting and absorbing job for a board. But once the new executive director arrives, the board’s tendency is to sit back and cheer from the sidelines.

Your board members are on the hook: They just hired you, and now need to show their commitment to working with you. Ask them for advice and give them assignments so they know right away that you plan to work in partnership. You have to find ways for board members to continue feeling needed, before they relax and refocus on other parts of their lives. And if you don’t ask them to do things, they will all too easily get used to the concept that you don’t need them.

Some ideas: They can host a gathering to introduce you to their contacts, make special fundraising appeals to their peers in support of your early priorities, and even step up into leadership positions such as committee chairs to help you move forward with new energy.

Court board allies: Make sure you line up a couple of allies on the board and communicate closely with them. That way, if you get something wrong (and you will), they will stand up for you and have your back. They can also advise you confidentially on the hidden pitfalls and the ways around them.

Be prepared for resistance and reluctance: For so many long-standing boards, resistance to fundraising is not just about fundraising, it’s about a decline of confidence in the executive director and a loss of excitement about their vision. As the new executive director, you need to understand and ultimately shift these dynamics to effectively mobilize the board, given that no one was likely to have come clean about this while trying to woo you into the job.

In other cases, the central issue is board members’ tendency to defer to the fundraising proficiency of the executive director, keeping out of the hot seat themselves. In those cases, the new executive director’s job is to provide encouragement and support, including the ability to articulate a clear vision.

Internal Team

Work with development staff: If you are lucky enough to have

development staff, your initial assignment is to really listen to what they think their job is and how they do it. They will be very happy that you want to plunge right into fundraising. Eventually, you may decide you need additional and/or different fundraising skill sets on staff, but for now, work with what you have in place. When you are ready (6 to 12 months in), you should establish a performance management system for development and involve your development team in deciding what the right metrics are for long-term growth.

Get all staff on board with fundraising: You want to build a staff culture where fundraising is a group activity. Make fundraising an agenda item in your weekly staff meetings to share your activities and invite everyone’s ideas and involvement. Who among their contacts—professional and personal—might you meet?

Create opportunities for confidential conversations: Let staff and board members tell you: 1) what they have been holding back; and/or 2) what they might not have thought to tell the prior executive director. Create a safe space to talk about the agency’s shortcomings. You might learn of fundraising opportunities they never thought to mention to the previous director or that your predecessor may not have followed up on.

Build a relationship with your predecessor: Flatter the prior executive director out the door. Reach out to them, even if you weren’t asked to. It is always useful to know their take on the history and context of key relationships. Donors with whom they had close relationships will ask them what they think about you.

Planning

Plan in chunks: You need to draw up a 100 (or 120) day plan, and eventually, a 12-month and 18-month plan. It is very important for the new executive to set out a fundraising agenda and to articulate it early on. In all these meetings, you should have a broad rallying cry (“We need to increase our unrestricted income by 20 percent”) as you ask people to jump onto your team to help make it happen. You can fill out the details later in your 120 days.

Make up for lost time: Many an executive director has been burned out or biding time before leaving. No one else wants to start anything innovative, or make waves, without a signal about what you, the new director, will think. Come in and offer a breath of fresh air and a strong vision from the start. Staff, board and donors will be watching for where the organization’s going—even if they won’t articulate it, they want to see a firm hand correct the organization’s drift.

Turn the focus to the future: The prior executive director probably wasn’t emphasizing new ventures, knowing they wouldn’t be there to see them through. You need to get people to think ahead. This is especially true for donors.

Stop and think: Take time at important milestones (three months, six months and a year) to reflect. Shut your door, and take a half day to think about all that you have learned and where you want to go. Hopefully, you are going to lead the organiza-

SAMPLE NEW EXECUTIVE DIRECTOR FUNDRAISING LAUNCH PLAN

GOAL: To strengthen Community Action League (CAL)'s connection with and access to its donor base

This includes the following elements:

- Reinvigorate CAL's donors
- Ease the way for individual donor major asks
- Develop a positive relationship with CAL's foundation contacts
- Bring new folks in (at all levels)
- Engage CAL's members
- Develop board cohesion and leadership
- Improve CAL's connection with special contacts in the media

In general, this time period is dedicated to increasing CAL's ability to raise money (rather than having a direct dollar goal in itself).

MARKETS: We are trying to reach the concentric circles of people who care about CAL, or who could be persuaded to become CAL fans.

This includes:

- Key individual donors, segmented by gift level and loyalty
- Members, segmented by activity/commitment level
- Current and past foundation funders
- Key collaborators/allies
- New board and staff contacts
- The new executive director's personal contacts
- Key media contacts who should feel like they are "in the know"

STRATEGIES: We will create a "new executive director" friend raising strategy with tiers of increasingly personalized contact. The elements of this strategy include:

Letters

Introductory letters written by board members to personal contacts, foundations, individual donors, and the new executive director's contacts (serving as both intro and prep for upcoming donor reception)

Letter Follow-Up

Phone calls and/or one-on-one meetings, depending on donor level and importance

Events

Introductory reception hosted by board president
"Members Welcome the New Executive Director" event

WORKPLAN: Calendar (condensed)

December

Development director works on donor prep charts.
Write "We welcome our new executive director" letter.

January (new executive director starts)

- Board chair preps board members on plan and asks them to send in their contacts.
- Board chair organizes and implements the media invitations.
- New executive director shares personal contacts with development director.
- Send invitations to donor reception and have volunteers make follow-up calls.

February

- Create timeline for March "Members Welcome the New Executive Director" party.
- Donor reception for major and mid-level donors, key foundation staff, and personal contacts of the board/staff/new executive director (invite 350 to get 80 to 100 attendees).
- End of February: Make phone follow-up calls to selected past foundation funders.

March

Early March: Send letters out to lower-level donors/general members and to the new executive director contacts (all who were not invited to February event).

Mid-March: Host "Members Welcome the New Executive Director" party (active and potentially active members, key collaborators/allies, and board/staff contacts).

Early March: Board/Staff Fundraising Planning Committee begins drafting a long-term CAL development plan with the goal of finishing the plan by mid-April.

HUMAN RESOURCES: Who will lead, who will carry out, and how?

Staff:

New executive director: all phone follow-up, one-on-one visits, and preparation of contact names/addresses.

Development director: database and implementation support, coordination of information flow, and calendar and invitation lists maintenance.

Staff organizer (with development director): planning and implementation of "Members Welcome the New Executive Director" event.

Board:

Board chair: organizing and implementation of media invitations, and coordination of board involvement for donor reception.

Most active board members: signing letters and writing notes, accompanying the new executive director on foundation and major donor visits, and hosting donor reception.

All board: inviting people they know who are prospective major/mid-level donors to donor reception.

tion into uncharted waters, especially on the revenue side. That takes time to contemplate about how it all fits together, not just implementation time.

Don't keep it all in your head: Your days may be such a whirlwind that you need to make sure you spend the time downloading what you are learning into a database and/or to an assistant. Every day you will be learning things that help you position your organization for fundraising success. You won't get another chance to get this information—and your immediate impressions—out of your head and into a computer. Create follow up tasks from each meeting so you have a plan.

Create a 90-day executive director launch plan: This is a full-bore, meet-all-the-donors introduction plan, with varying levels of personalization depending on donation level, longevity of donor relationships, and future potential (see the sample plan on the previous page). Try to mix already scheduled activities (the annual gala or a holiday celebration) with specially created ones (like a “meet the new executive director” gathering for board alumni).

Get Help

Learn by watching: Find an experienced fundraiser from your board or staff who can take you along on solicitation calls, so you can watch the art of fundraising by being part of it. If no one in the organization has done fundraising successfully in the past, see

if you can find someone from outside your organization who does it well. Ask to shadow them.

Mix with your peers: You will find wisdom, support and camaraderie among the people who run organizations similar to yours, particularly those who are already program partners or fellow advocates, but among competitors, too. Reach out, ask for advice, and share your thoughts.

Get a coach: Find a coach, or at least a sounding board—someone to hear you out as you're weighing competing priorities. The ear of someone who has been through this with other organizations but has no skin in the game could be invaluable in helping you assess the players as you get up to speed. They can also help you determine benchmarks to shoot for in your own work.

New executives have a lot on their plates, but the case for prioritizing fundraising is strong. It's a quick way to build a sense of teamwork with the new leadership, and you don't have to wait to acquire more expertise to succeed in relationship-building. Even if you can't get to all the suggestions in this article, undertaking even a few of these recommendations will pay off. ■

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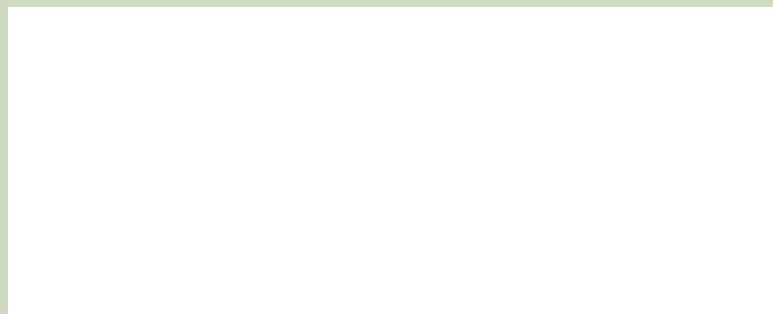
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