THE LISTENING TOUR 2023

FUELING DYNAMIC FUNDRAISING: CATALYZING NONPROFIT THRIVABILITY

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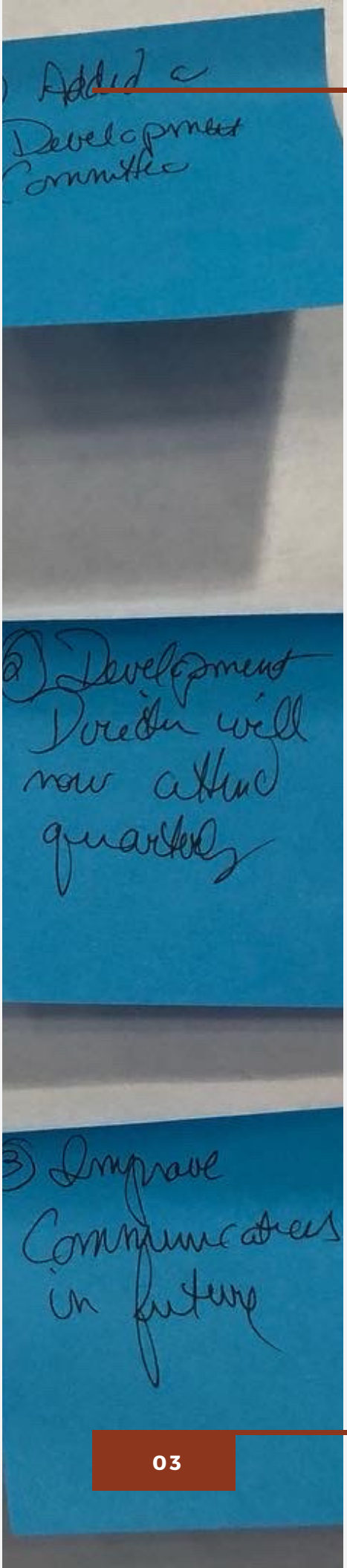


FUELING DYNAMIC FUNDRAISING

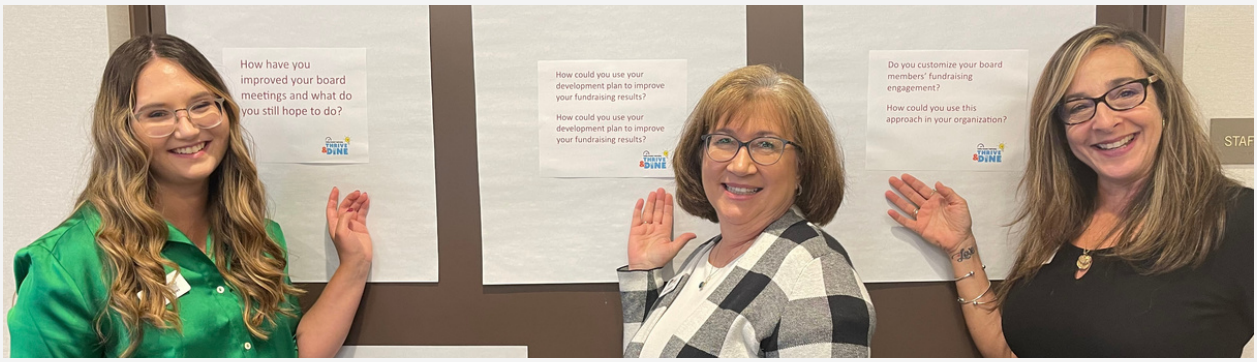
Fueling Dynamic Fundraising (FDF) is a part of the Nonprofit Thrivability Initiative of The Patterson Foundation (TPF), which strengthens organizations by providing structured opportunities and expert guidance. FDF supports organizations by focusing on fundraising – an essential component of a thriving nonprofit organization.

FDF seeks to meet a need not currently met by providing research-based, advanced education around fundraising and philanthropy for nonprofit CEOs, staff, volunteers, and board members. Through TPF's ongoing relationship with the Indiana University Lilly Family School of Philanthropy and The Fund Raising School (TFRS), local nonprofits in Florida's Charlotte, DeSoto, Manatee, and Sarasota counties have the opportunity to engage in sessions that deepen the understanding of fundraising.

FDF began in the Fall of 2020 when a series of focus groups were conducted in partnership with the Association of Fundraising Professionals (AFP) Southwest Florida Chapter and Margin & Mission Ignition (MMI), another of TPF's Nonprofit Thrivability initiatives. These focus groups revealed that nonprofits sought to strengthen board members' participation in fundraising. Six nonprofits were chosen to participate in a custom, 6-week virtual course from The Fund Raising School. Following the completion of the TFRS course, the organizations were invited to participate in a consulting phase with Sara Leonard, FDF's initiative manager, to support implementation of the concepts from the course.

By collaborating with TFRS, FDF brings preeminent fundraising education to the local area. TPF knows that it takes all key stakeholders working together through a shared vision and well-developed strategy for fundraising to be successful. Improved fundraising leads to stronger organizations whose increased impact strengthens both individuals and our community as a whole.

THE LISTENING TOUR 2023



Why

Fundraising is continuously changing, but the pandemic accelerated and forced changes rapidly. Knowing that major shifts happened for nonprofits, such as canceled events, pivoting to virtual meetings with donors, and creating online projects and programs, we began to ponder how fundraising needs might have also shifted. Rather than developing our own hypotheses, we embarked on a listening tour.

TPF values the approach of not arriving with the answer, meaning it is our responsibility to listen to the community and have them tell us what is needed. We cannot derive a plan without authentic information. To obtain it, one must go to the source. The Listening Tour was the embodiment of one of TPF's key actions of learning: time spent listening, asking questions, and exploring, builds mutual understanding, and mutual understanding fosters the development of trust.

Who

In this case, the source is those who work tirelessly to fundraise for their nonprofit: CEOs, development directors, development staff, board members, and volunteers. With the intention to listen to as many staff and volunteers from organizations within our four-county region as possible, The Giving Partner was a logical tool to help foster wide participation. The Giving Partner is presented by the Community Foundation of Sarasota County and is a centralized nonprofit directory for year-round exploration and giving. It is a resource for grantmakers and other entities for philanthropic research, with over 700 profiles of nonprofit organizations serving Charlotte, DeSoto, Manatee, and Sarasota counties.

Through The Listening Tour, TPF's FDF team connected with 112 participants from 95 organizations.

Format

To engage with a diverse audience, we facilitated a series of listening tour sessions spanning a range of days, times, and formats. These included virtual and in-person options, ensuring flexibility and accessibility for everyone interested in participating. Seven sessions were held on Zoom, with three in-person sessions at Samaritan Counseling, Military Heritage Museum, and Manatee Community Foundation. To foster a safe environment for candor, some sessions were segmented by job title.

How

The Fueling Dynamic Fundraising team, led by Sara Leonard, with support from Josephine Eisenberg and Rachel Ploss, crafted questions to guide the conversation during the listening sessions and gain invaluable feedback. Adopting TPF's listening-based approach to shared learning, we cultivated a rich atmosphere of trust. Participants engaged in open-ended conversations prompted by thought-provoking questions, all within a secure and confidential environment. This approach aimed to promote connections and enhance our collective understanding.

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RESULTS

OVERALL THEMES

The nonprofit staff and volunteers who participated in The Listening Tour confirmed that each organization is unique but shares many of the same strengths and challenges. Fundraising is conducted in a wide variety of ways and by a variety of volunteers and staff. However, several key themes emerged.

1. Events require a large amount of resources

While events have been successful for many organizations, events can be very time-consuming. For smaller organizations, this requires a high level of capacity and commitment, which strains the organization. In addition, some organizations expressed that the pandemic showed them that events were not necessary to fundraise successfully. However, now that we are post-pandemic, there is an appetite for indoor and outdoor events where people can be safe and still together.

2. Crises have fueled fundraising

The global pandemic and Hurricane Ian greatly impacted fundraising for many organizations. The reality of living in a hurricane region is that disaster fundraising locally can be successful. Organizations tend to receive more donations or higher donations after a hurricane occurs. In addition to storms, many organizations received more gifts during the pandemic, and their donors frequently asked how they could help. Simultaneously, other organizations experienced an interruption in fundraising and support. These organizations still face significant challenges, including facility damage, interruption in mission services, and staffing impacts.

3. The power of matching gifts and grants

Powered by The Patterson Foundation's match with no cap, matching campaigns have proven very successful for organizations. The Giving Challenge, a regional giving day presented by the Community Foundation of Sarasota County, allows organizations of all sizes to leverage the power of matching challenges. Other matches like the Hundred X Campaign and the Flanzer Trust Matching Gift Program have also been catalytic for their fundraising.

4. The value of joyful stewardship

Organizations have found that stewardship efforts allow them to know their donors and build stronger relationships. Stewardship allows nonprofits to differentiate themselves in a community with many charities. Participants expressed that although it's sometimes difficult to remember the little touches, that keeps relationships transformational instead of transactional. Several organizations voiced that thoughtful donor relations have resulted in strong planned giving and unexpected gifts. One participant stated, "The donor is leaving his entire estate to the organization because they listened and treated him well."

5. Feeling the strain of limited resources

Many organizations perceive themselves as resource-limited, citing time, people, and staff limitations. Several participants voiced that lacking capacity prevents staff positions from focusing solely on fundraising. Many organizations recognize the need to diversify their fundraising portfolio but feel stretched with current levels of activities.

6. The challenge of gaining awareness and recognition as a nonprofit in the community

Sometimes gaining status and awareness has proven to be challenging. One organization shared, "The community doesn't recognize that we're a nonprofit. That has been an obstacle." While another said, "It can be challenging to articulate the mission without a tangible item to highlight or showcase." Many expressed that they struggle to share the stories of how their nonprofit impacts the community.

7. Not all board members understand their role in fundraising

Governing Boards can be vastly different, and they do not always fully understand their role in fundraising. Participants shared that it can be challenging for nonprofit staff to guide board members in successful fundraising endeavors. Nonprofit staff expressed that it would be helpful to hear “What do you need?” and “How can we help?” from board members.

8. Sources of fundraising training

The professionalization of fundraising is still developing, underscoring the demand for more fundamental training. The opportunity to dive deep into core fundraising components is insufficient for many organizations. Participants expressed they have received helpful training from the Association of Fundraising Professionals (AFP), SCORE, local foundations, mentoring, learning on the job, peers, colleges and universities, the Chamber of Commerce, and online research. However, participants expressed challenges in implementing best practices learned in training.

9. Donor communication strategies and techniques vary

Communication with donors occurs in a multitude of ways at each organization. Technology has offered many new ways to communicate, but organizations still engage in high-touch methods like phone calls to donors. Others engage via mailed letters, emails, emails with videos, social media, and newsletters. Most importantly, communication styles vary to meet donors’ preferences.

continued

10. Everyone wears multiple hats

The participants confirmed what many professionals in the philanthropic sector have likely experienced wearing multiple hats at once. Organizations of all sizes need more staff capacity to focus on fundraising. Participants acknowledge that fundraising is most successful when it is a part of everyone's job at an organization, but that is hard to accomplish in practice. Organizations strive to embed a culture of philanthropy that empowers all stakeholders to support fundraising. Participants expressed a need for consistent training to accomplish this.

ACTION AND MOVING FORWARD

Now that the Fueling Dynamic Fundraising team has had a chance to listen to and reflect upon the insights given to us by 112 participants from 95 organizations, we are excited to share information about new FDF opportunities.

After hearing the need for professional training on the fundamentals of fundraising, FDF is set to offer training programs in partnership with The Fund Raising School (TFRS). Course offerings will include:

- Fundraising basics
- Fundraising for small nonprofits
- Engaging board members in fundraising
- Other timely topics

TPF's goal is to offer courses of varying topics based on the needs identified through the 2023 Listening Tour. We seek to engage ongoing nonprofit staff and volunteers in TFRS courses to address fundraising needs.

The FDF initiative will go beyond training to include a consulting phase. Participation in the initiative offers nonprofits the opportunity for long-term support in implementing enhanced fundraising strategies and integrating these advancements into the organizational culture.

Because fundraising is key to advancing mission thrivability, TPF's Fueling Dynamic Fundraising will invest in strengthening organizations by improving fundraising practices for heightened mission thrivability.

Thank you to the organizations and individuals who were able to participate and share their knowledge and expertise with us:

Ability to Include
Agape Flights
Avenue 941
Better Together
Big Brothers Big Sisters of the Sun Coast
Bishop Museum of Science and Nature
Boys & Girls Clubs of Manatee County
Boys & Girls Clubs of Sarasota & DeSoto Counties
Bridge a Life
CenterPlace Health
Charlotte Harbor Chapter MOAA
Charlotte Players
Children's Guardian Fund
Climate Adaptation Center
Conservation Foundation of the Gulf Coast
Cyber Ohana Project
Easterseals Southwest Florida
Eternal Reefs
Family Promise
Fandango Sanctuary
Feeding Tampa Bay
Florida Cancer Specialists Foundation
Friends of Myakka River
Friends of Sarasota County Parks
Goodwill of Southwest Florida
Gulf Coast Partnership
Healthy Teens
Help a Diabetic Child
Help to Home
Humane Society of Manatee County
Humane Society of Sarasota County
Indigenous in Music and Arts
ITN Suncoast
Jewish National Fund USA
JFCS of the Suncoast
Just for Girls
Keep Manatee Beautiful
Laurel Civic Association
Lighthouse Vision Loss Education Center
Lionfish Central
Manatee County Habitat for Humanity
Manatee Performing Arts Center
Meals on Wheels PLUS of Manatee County
More Too Life
NAMI Sarasota and Manatee Counties
National League of American Pen Women Sarasota Branch
Neuro Challenge Foundation for Parkinson's
Operation ECO Vets
Peace River Botanical & Sculpture Gardens
Peace River Wildlife Center
People Who Help People
PicklePlex of Punta Gorda
Plymouth Harbor
Pregnancy Solutions
Project Light
Punta Gorda Symphony
Resilient Retreat
Ringling College of Art and Design
Rise & Nye's
Rocket Phonics Foundation
Ronald McDonald House Charities Tampa Bay
Sarasota Chalk Festival
Sarasota County Rowing Club
Sarasota Emergency Radio Club
Sarasota Library Foundation
Sarasota Medical Pregnancy Center
Sarasota Parrot Conservatory
Sarasota Prostate Initiative
Sarasota Young Voices
Satchels Last Resort
Save Our Seabirds
School Attendance Support

SDRP/Stargazers
Sleep in Heavenly Peace
SOAR Learning Center
SPAACES
Safe Place and Rape Crisis Center
Special Olympics Florida
Squeaky Wheel Theater
Strings Con Brio
Teen Court of Sarasota
The Glasser/Schoenbaum Human Services Center
The Paradise Center
The Pops Orchestra
The Venice Chorale
Transition Sarasota
UPLIFT Florida Network
Uplifting Pi Beta Beta Foundation
Van Wezel Foundation
Venice Area Beautification
Venice Institute for Performing Arts
Visible Men Academy
WUSF Public Media