

## INTRODUCTION

### WORTHY AND PREPARED: SELF-HELP FOR THE CHARITABLE ORGANIZATION

Some years ago during a break at a board retreat session for a small charity, a Director mentioned reading about a major charitable gift that had just been announced in a prominent national newspaper.

The Director's small charity was based in an agricultural area an hour's drive from a major metropolitan centre. Over time, the area had slowly become filled with the extremely wealthy who were converting old farms into country residences. Equestrian centres and high-end private golf facilities were very much part of the scene.

The Director had recently become neighbour to an extremely wealthy and internationally known businessman. The newspaper announcement focused on a multi-million dollar gift from this neighbour to a charity. Not, alas, to the charity supported by the Director, but instead to a large research hospital attached to a high-profile university in the nearby large city.

"Why?" asked the Director, "would he give a gift to them and not to us? He lives right beside me in this community. Why didn't we get his gift?"

The answer was simple enough. The donor found that the charity of his choice matched his own values and expectations. In short, he found it to be Worthy and Prepared.

Conversely, the donor didn't consider the Director's charity – if he knew about it at all – as being worthy of support – neighbourliness notwithstanding.

It's easy to understand the Director's question that day. It is equally easy to find fault with his simple argument. The position you take may indicate which side of the worthy and prepared equation you support.

One side says that donors give to people they know and like and that this is often all you need to attract funding.

The other side says that, even though relationships between donors and recipients are vital, what is much more important is that the

ORGANIZATION, as a whole, is worthy of support and prepared enough to receive it.

We are firmly on the side of those who say that being worthy of a donor's support and being prepared to turn that support into action are the essentials to securing major gifts.

Whether the organization is worthy by default, by association or by design, that worthiness is the first key to securing a transformational gift. Being prepared for the new relationship is also extremely important. Can the organization's practices cope with a larger gift and all the expectations that it brings? Does the organization instill confidence in the donor by what it does and how it operates? How is that confidence instilled? How is that reinforced on a daily basis? In discussions with many fundraising professionals from all types of organizations, as well as other areas of professional practice, the core message of "You need to be Worthy and Prepared" is greeted time and again with the sort of immediate recognition that many such self-help messages often receive.

The message itself is simple. Putting it into practice is more difficult. We all want to believe that we are ready for big gifts and significant donations. We all want to try and make it happen. But time and again, at every level of the charitable world, evidence abounds that most organizations, even those successful in gathering community support, are not, in fact, advancing the basics of being Worthy and Prepared.

As a result, they are not raising the funds they could be raising, not focusing on the best possible ways to raise money and not focusing on what this book calls "their destiny proposition." Creating a climate of giving through worthiness and preparation is hard work. There is no easy way around it.

One important challenge is that it is difficult to pin down exactly what being Worthy and Prepared means. In some ways it is a state of mind – a

philosophical acceptance that certain standards need to be met for maximum success by even the smallest of charities.

But that state of mind must be accepted by all three segments of an organization that are charged with creating and benefiting from the concept: the Board, staff and volunteers. This book explains how that can be achieved, so that small charities in particular can be successful in raising funds, most notably larger gifts.

It also provides many practical and pragmatic things to consider, steps to take and fundamental ways to operate that are at the core of every truly Worthy and Prepared organization. This is more than a fundraising book. It is more than a management book. This is a self-help book for your organization. As an organization, what makes you “worthy”? And, once that is established, how do you become truly “prepared”?

To be successful, the organization must constantly think like a leader. It must set the highest standards, expect the most from all its important internal stakeholders, take bold steps, possess the courage to try new things and the confidence that it can fail and still succeed.

In short, it has to be Worthy and Prepared.



**WORTHY AND PREPARED:  
WELL INTENTIONED... BUT**

For the seven volunteer board members of the Good Food Group (GFG), gathered together on their own time this Saturday morning, the fundraising planning session that they had so eagerly anticipated was not going well.

It had started with great expectations.

“We’re here to see if we can double our current operating revenues in two years,” said the hired gun facilitator with all the optimism and gusto of his calling.

“We need to take a look at everything we are doing now and ask, “How can we do it better, more creatively, more profitably and, of utmost importance, in ways that benefit the organization and its members?”

Everyone nodded enthusiastically. This was certainly why they were there. The organization badly needed new revenues to help it offer its parcels of food and other necessities for elderly people still living on the streets.

It needed funds to recruit new members, to market itself effectively, to train more counselors, to create new ways to provide physical, emotional, financial and spiritual help for those most in need – and, above all, to increase its ability to generate donations of food and distribute them effectively.

In short, it needed far more financial stability in a hurry. It had to find ways to do this at a time when the economy was making fundraising even tougher than usual and making it harder for volunteers to break away from their own pressures and time constraints to support the agency.

For the first few hours, the group worked energetically in one of the peaceful salons of a local funeral home, generously donated for the day by one of its members.

It conducted its own SWOT analysis (Strengths, Weaknesses, Opportunities and Threats), set goals for the future and analyzed the gap between where it was now financially and where it needed to be. It even

came up with several action plans (“building blocks,” the facilitator termed them with typical consultant-speak) to get them from A to B.

Then came the moment of truth, the time when, as the facilitator said, “The rubber meets the road.” The group had to develop costs for the action plans and set a fundraising goal for the future.

As the late afternoon sun bathed the room in a golden glow, three things happened to the volunteers.

First, they realized that their educated guesses about what things cost, were just that – guesses. They would need to do far more work to determine real costs: work that could only be done by their already over-burdened staff or by them. None of them really had the time or knowledge to do what was required. Nor, truth be told, did they have the inclination on top of all their other volunteer commitments.

There was a real danger that they would fall victim to “analysis-paralysis,” unable to move forward because of lack of time and resources.

Second, the group recognized that doubling current revenues over two years sounded good on paper. In reality, however, this meant a 100% increase (in their case a total of \$250,000) – a daunting figure that, beyond great ideas, they did not know how to achieve. How could they ever raise such a huge amount in an increasingly tough economic environment?

Third, and most critically, the one person who might be able to steer them through this – the Executive Director – confronted them with a painful truth.

“You hired me as an administrator, not a fundraiser,” she said. “I’d be lying if I told you I know how to raise this money. In fact, I’m scared of doing it. I’d probably rather quit than take it on.”

Suddenly, all the energy that had filled the room evaporated like mist in the morning. It seemed as if all the great work of the day had gone for

naught. Confronted with the reality of their situation, the volunteers found themselves fearful and frustrated, unable to move forward effectively, to see what had to be done next.

In that moment, they recognized what so many charities today are discovering. No matter how noble their cause or how dedicated they were, no matter how many people depended on them, if they wanted to be successful in fundraising, they had to learn to be Truly Ready.

In other words, they had to become Worthy. And they had to be Prepared.