

Development CoP

Feel the Power and Call the Meeting!

Facilitators: Sheila Alexander and Jennifer Weinstock

Guest: Pearl Kane

Date: December 17, 2009

Goals of the Call

1. To create a shared value for the importance of face to face meetings
2. To learn some tools for calling and having a successful meeting

Agenda

- Introductions
- Welcome new CoP members
- Why is a CoP call not like a webinar?
 - Knowledge is in the field
 - Participation is key to our shared learning
- Guest facilitator and topic
- What's your take away?

Pearl Kane

- Pearl Lerner Kane, the president of PLK Consulting Group LLC (formed in 1994), has 30 years of experience working with nonprofit organizations. Most of the work of PLK Consulting is with Jewish communal organizations. With formal training in group work, community organization and marketing for nonprofit organizations, the mission of PLK Consulting is to create vibrant, responsible, visionary institutions and communities. She has been a trainer for the UJA-Federation of New York Wiener Educational Center and for the Nonprofit Resource Center in Connecticut.
- Pearl is a PEJE coach for the Leadership and Fundraising Academy.



Be A Leader and Call the Meeting

**You gotta walk the walk, you
can't just talk the talk.
You can talk and walk at the same time!**

Some Good Advice

- *“There are risks and costs to a program of action, but they are far less than the long-range risks and costs of comfortable inaction.”* President John F. Kennedy

Discuss: Are you too comfortable/ busy – selling raffle tickets, soliciting journal ads and running events?

You, and a team of capable leaders, need to get out there and start meeting with people.

WHY?

- Capable leaders and head of school need to get out there.
 - It is easier to do the ask once you build up the relationship and make a connection.
 - Meeting face-to-face allows for a multi-dimensional connection.

Chat Questions, Answers, and Comments

Q: Even if fundraising is not a goal (or even appropriate for a meeting), is it okay for the fundraiser to be there at these meetings to get a better feel for parents in the school and to get to know them better, and put pieces together of what they do and who they know? How do you make people comfortable and not think they are going to be asked for money with the fundraiser in the room?

A: I attend all events that include parents—back to school night, grade level meetings, games, plays—it’s important for parents to know that I am part of the school community and do not only have fundraising as a priority.

A: If the development person becomes part of the fabric of the school and is present at various school events that are not necessarily “fundraising” events, then his/her presence won’t be as jarring.

Comment: Interestingly, in our HOS/Parent meetings, we briefed the HOS ahead of time as to who he was meeting with, their children, and their giving history. He was aware of the group and we debriefed after each session. He noted those individuals that he felt we should follow with or solicit.

You, and a team of capable leaders, need to get out there and start meeting with people.

WHY?

- ① Successful fundraising lies in the strength of your relationships.
- ② The process is so simple and yet often overlooked because it seems too time-consuming. Your time could not be consumed in a better way.
- ③ Begin your relationships by calling the meetings.

But, WHO should you be meeting with??

- Board of Directors/Trustees
- Head set up morning breakfasts with families. 24 meetings took place. The agenda: Vision for the school, Parent vision, Q&A.

Chat Questions, Answers, and Comments

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Q: I'm new to my school and so I have made it one of my goals to meet with the board members individually, but sometimes when I contact them to meet with me, I feel uncertain about what the agenda should be at these meetings. Any ideas?

A: As someone who is new, the best thing is to ask them to pick their brains. To get their advise, history of the school, input, vision, goals they have for the school. Listening is the best learning.

A: Call the person who won't turn you down first.

A: I would not ask on the first meeting—it would be a get-to-know meeting.

Q: What type of advise are you talking about? If it is advise on things at school that you know is under administration's responsibility and won't change, then they will be frustrated not to see any changes they advised on.

Comments:

- Every school should have 1:1 meeting with every board member every year.
- I think it is important that the Director of Development staff the board or at least attend board meetings.
- Great examples given by Pearl, would love to hear more about a particular meeting.

But, WHO should you be meeting with??

- Parents
- Parents of parents
- Alumni
- People in your community who are interested in day school education
- Jewish leadership in your community

Talk to people...and create an army of supporters.

- People who are donors now or were once donors
- People who have not given before but are close to someone in the school
- People who are known to be interested in Jewish education
- Leaders in your community
- Every parent
- Every board member

Share your story:

- Can anyone share an example of a meeting they had recently- who was it with, how did it move that specific relationship forward?
 - A parent who was not connected to the school
 - Board member to find out what kind of support they need for their committee. They get job satisfaction as trustees if they feel supported by a key staff person.

Share your story:

- What are the barriers you face in having these meetings?
 - Understanding what the agenda should be and knowing what to say when you ask for the meeting.
 - Deciding who to call first.
- How can we remove those barriers?
 - Turn it into a project, “Calling all Parents”

What do you say?

- What do you say to get the meeting?
 - Don't solicit at the first meeting.
 - Board Chair would like to meet you. Talk about involving parents in the school and getting feedback from them. We try to involve them in fundraising around their feedback.
 - If you are new, let them know you want to learn from them. Otherwise, let them know you would like to sit with them and learn about why they are committed to the school.
- Why are you asking for their time?
- Let's brainstorm some ideas:

Possible agenda:

- Give update on school year.
- Give advice on some issue facing the school .
- Share some business challenge – transparency helps to build relationships.
- Ask for your friend to use their social, organizational and business networks to introduce your school to new prospects – they can lead you to a person, a foundation or a funder who can make a difference – remember – you are having meetings to make relationships but also to spread the word.
- Write your own script based on your own school and your own community. Be thoughtful. LISTEN MORE THAN TALK.

What's the point??

- Face-to-face meetings are the best way to communicate. No doubt about this.
- Building relationships delivers visibility and affinity for your school and can lead to financial support.
- Word of mouth is the most powerful marketing tool known to humans.

The Story of How The Red Tent Became a Best-Seller

- After the first release, the book only sold 10,000 copies.
- Anita Diamant and her publisher then sent 1,000 copies of the book to influential people, including many rabbis.
- These rabbis, moved and inspired, spoke about the book from the pulpits of their synagogues. SO THOUSANDS MORE HEARD ABOUT THE BOOK.
- Two years later, two million copies of the book had been sold.
- **HOW CAN YOU SPREAD THE WORD?**

Chat Questions, Answers, and Comments

Q: What software do you have?

A: Raiser's Edge

A: We also use Raiser's Edge

Q: What is the best way to keep notes on all the meetings?

A: I find writing them down in a daily diary works better than in the database. Some stuff I put in the notes section of the database.

Comments:

- I hand-write thank you's and have gotten calls from people who actually mention the notes.
- The school history database is important.

Think of how many friends you could make in just one year...

- Every development director should have a minimum of 3 meetings per week. That would amount to 120 meetings a year, spread over 40 weeks.
- Every head of school should have a minimum of 1 meeting per week. That amounts to 40 meetings per year.
- Every board president should have a minimum of 2 meetings per month. That amounts to 20 meetings per year.
- If two other leaders meet with 1 new friend per month, that is another 40 meetings per year.
- *That's a total of 220 relationship-building meetings per year.*
- **IMAGINE WHAT MIGHT RESULT FROM CALLING THOSE MEETINGS...**

Desired Outcomes

- **What will these meetings lead to:**
 - Referrals of new prospects and funding sources
 - Increase in gifts from current donors – you have to ask of course!
 - New gifts from lapsed donors – you have to ask of course!
 - New gifts from new donors

Desired Outcomes

- Referrals of new students
- **Visibility for the school in the community and an appreciation of the challenges and successes of the school**
- New leadership
- New volunteers

- **You think the process is worth it now?!**

Questions

- ◉ When you ask for advice and it is not possible to follow-through, how do you follow-up with them?
 - Talk about it during the meeting. You can let them know it is an interesting idea but it may not be doable.
 - Keep the relationship moving.

Don't Forget:

- Use your team to make your list of friends for your meetings.
- Take good notes. Keep a diary of the meetings.
- Record each meeting in a database.
- Follow-up each meeting with a thank-you.

Don't Forget:

- Follow-up each meeting with requested information. Provide answers to questions.
- As you explore referrals, make sure that you inform the source what the progress is and how it affected your school.
- Don't forget to call your friends again and again. Keep them in your communications loop. Keep your friends close to you. **You want to keep these relationships for a very long time.**

Next Steps : Continuing the Discussion

What would you like to continue talking about in Google Groups?

Title:



Message:



If you need a reminder about Google Groups, refer to your Quick Guide for Google Groups. For additional assistance, email Jennifer@peje.org

Next CoP Call

Rae Ringel, President of the
Ringel Group
Tuesday, February 2, 2010
2:00-3:00 PM Eastern

Watch the Google Group for
upcoming call details.

**Thank you to
Pearl Kane**

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