

## Hope is Not a Strategy: Moving from Transactional to Transformational Fundraising

### About the Speakers



Leah and Darcy. Besides spending time with his family, he loves dancing, genealogy and traveling.

**Matthew Busby**, CFRE, is the Advancement Officer for College of the Mainland (COM). He believes he has the best job, whether watching amazing students overcome real, tough impossibilities to achieve success...or seeing the joy the donors experience through philanthropy. His responsibilities include development and foundation operations for COM. The foundation has experienced several stages of positive, transformative change since he joined in 2014. Before joining COM, he spent 6 years at Hill College working in student services and fundraising roles. He is a Temple College alumni, Baylor University grad and a recent Certified Fundraising Executive (CFRE). Matthew was elected as president of the Texas Association of Community College Foundations in 2017. A sixth-generation Texas, Matthew lives in Texas City, Texas with his wife, Sarah and two precious, amazing little children,



their three children in Sugar Land, TX.

**Jeffery Doherty**, Senior Consultant for Mission Advancement Professionals (MAP), is a dynamic development professional with over twenty years of experience in nonprofit management and institutional advancement. Jeff has raised millions of dollars in annual, major gift, and capital campaign funds for faith-based organizations and social service providers in rural and urban areas across the United States. Before coming to MAP, Jeff served as a consultant for nationally recognized fundraising consulting firms where he conducted feasibility studies, capital campaigns, board trainings, and annual fund development counsel for a diverse client base that included both start-up and multi-million dollar organizations. Prior to his consulting role, Jeff held leadership positions with several national associations, where he identified, recruited, trained, and managed volunteers for community-based fundraising activities. Jeff lives with his wife Jenny and

# Hope is Not a Strategy: Moving from Transactional to Transformational Fundraising



---

---

---

---

---

---

---

---

## Introductions



Matthew Busby



Jeff Doherty



---

---

---

---

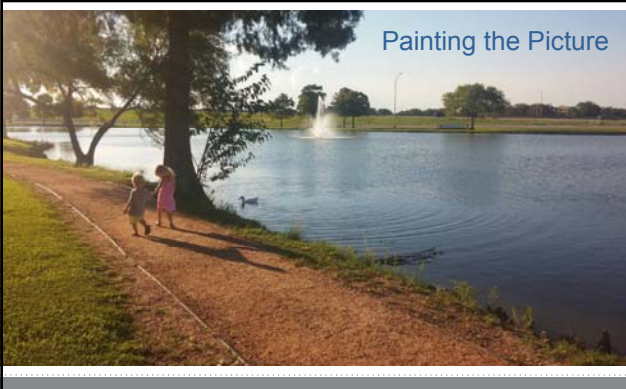
---

---

---

---

## Painting the Picture



---

---

---

---

---

---

---

---

## Change Is Coming

- > COM Foundation in Transition Stage
- > Selection Process & Board Involvement
- > What set MAP apart



---

---

---

---

---

---

---

---



## Crushing Hope ... Walk Through Process

- Intentional
- Relational
- Transformational

\*A Donor Named Robert



---

---

---

---

---

---

---

---



## Jeff Walked In



---

---

---

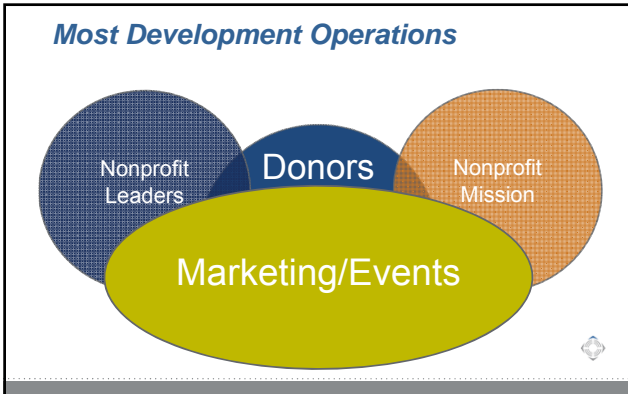
---

---

---

---

---



---

---

---

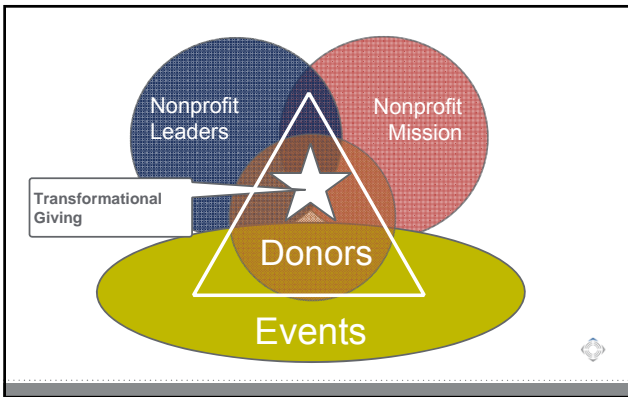
---

---

---

---

---



---

---

---

---

---

---

---

---

**Why Transformational Gifts Instead of Major Gifts?**

- > Major describes only the size of gift
- > Transformational includes the donor
- > If done correctly, all parties are transformed

A small diamond icon is in the bottom right corner.

---

---

---

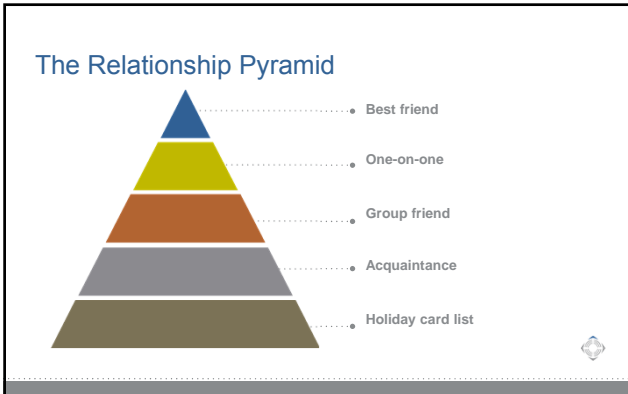
---

---

---

---

---




---

---

---

---

---

---

---

---

### Donor Prospecting & Segmenting

Resource Mapping:

- > Data Review
- > Developed Initial Top 90 – Top 30 List
- > Engagement Opportunity

---

---

---

---

---

---

---

---

### Building a Financial Model Guided Goal Setting

For Broad-Stroke Planning  
Top 10 Goal: \$850,000

For each box, there should be:

- At least one name
- The prospect's interest
- Time of year gift is made
- Names of visitors

\$150,000			
\$120,000	\$120,000		
\$90,000	\$75,000	\$75,000	
\$60,000	\$60,000	\$50,000	\$50,000

---

---

---

---

---

---

---

---

### Now What

- › Knew who donors were
- › Knew how we wanted to spend our time
- › How to face the Constant Challenge

**Goal:**

For our donors to feel the college differently than they ever had before.




---

---

---

---

---

---

---

---

### Fundable Projects

- › Strategic identification process of funding priorities
- › Developing sustainable and impactful giving
- › Better aligning needs of the college with interests of the donor




---

---

---

---

---

---

---

---



### Why Create a Donor Plan?

- › To bring a donor closer to your mission
- › To challenge giving
- › To thank more effectively
- › To serve post-gift beyond expectations

In short: To create a great donor experience




---

---

---

---

---

---

---

---

### 4 Key Steps to Crushing Hope, aka Effective Donor Planning

- › Inform (logic, head knowledge)
- › Cultivate care (emotion)
- › Inspire (motivate)
- › Ask (deliberate invitation)
- › Fulfillment (exceed expectations)




---

---

---

---

---

---

---

---

### Ownership

Getting from idea to standard operations

#### Partners & Their Roles in the Process

- President
- Board of Directors
- Donors
- Staff




---

---

---

---

---

---

---

---

### Pulling It All Together

- › Annual Development Plan (all things in the office)
- › What is the #1 and drawing constant correlation
- › Thinking Differently
- › Connecting the dots




---

---

---

---

---

---

---

---

### The Natural Next Step

- > Just like Marriage, what is your degree of certainty
- > Ummm, Hello?



---

---

---

---

---

---

---

---

We all hope for  
quality decisions but...

***Hope is not a strategy!***



---

---

---

---

---

---

---

---

What **wouldn't** you do  
for a million dollars?



---

---

---


---

---

---


---

---



**Get Started**

- Establish a portfolio
- Build a financial model
- Enlist a partner
  
- Make first contact
- Create a donor plan
- Stick to it



---

---

---

---

---

---

---

---