The Decision Makers
Engaging Senior Leadership & Boards

Greg Millar – IHC National Manager, Fundraising   May 2024

Public Fundraising Symposium
Getting It Right:
Regulation & Best Practice

Be very clear of the decision/s you need

- Engaged support for your strategy or plan

- Strong support for key fundraising techniques

- SUSTAINED INVESTMENT

- This is Your Why

Know Your Audience

- Who are you speaking to?

- What's their WHY? &
  Why would they sign-off Your Proposal?

- What are their key drivers?

- How do they make decisions?

- When do they make key decisions?

- When do you need decisions (anticipate)?

Know Your Audience

Ethical intellectuals
Need consensus.
Need to be right.
Process to avoid error.
Thorough.
Evidence business.
Used to grant giving culture.
Manage complexity.
Judgemental.

Ambitious Achievers
Need to stand out.
Need ambition/ challenge.
Freedom to act.
Fast moving.
Emotions business.
Used to sales and marketing culture.
Manage simplicity

The non-profit culture clash. Assess where your key decision makers sit.

CEO's and Boards usually expect Fundraising Management to exhibit Ambitious Achiever characteristics.

Plus, navigating risk and providing a clear plan with accurate analysis and measurement.

Know Your Audience – The Shared Sweet Spot

Ethical intellectuals
Need consensus.
Need to be right.
Process to avoid error.
Thorough.
Evidence business.
Used to grant giving culture.
Manage complexity.
Judgemental.

Mission Impact

Ambitious Achievers
Need to stand out.
Need ambition/ challenge.
Freedom to act.
Fast moving.
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When the CEO "gets it" – it works.

The CEO needs to:

1. Be onboard
2. Agree to strategic investment outline
3. Get Board agreement & buy in
4. Stick with the plan, has your back
5. Be excited along with you and the team

You – As the Fundraising Manager need to:

1. Provide them with the means to do this
2. Provide them with the road map – keep it simple
3. Remind them when you hit markers (analysis)
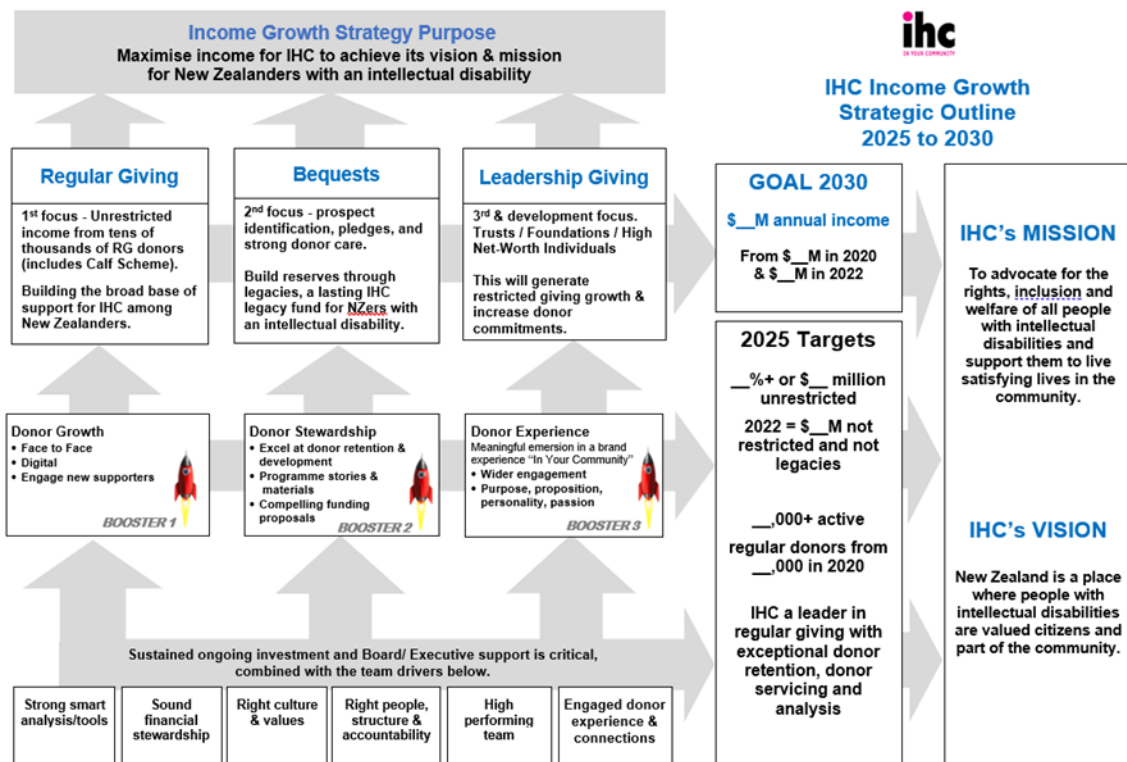4. Be transparent – including set-backs
5. Inspire confidence and trust

A Simple Toolkit
for Fundraising Leadership

- A Strategy on a Page

- A Familiar dashboard

- Analytical Tools

- Forecasting Tools

- Benchmarking

- Compelling Messaging

- Journey Automation

Strategy on a Page – IHC context

Income Growth Strategy Purpose
Maximise income for IHC to achieve its vision & mission for New Zealanders with an intellectual disability

ihc

IHC Income Growth Strategic Outline 2025 to 2030

Regular Giving

1st focus - Unrestricted income from tens of thousands of RG donors (includes Calf Scheme).

Building the broad base of support for IHC among New Zealanders.

Bequests

2nd focus - prospect identification, pledges, and strong donor care.

Build reserves through legacies, a lasting IHC legacy fund for NZers with an intellectual disability.

Leadership Giving

3rd & development focus. Trusts / Foundations / High Net-Worth Individuals

This will generate restricted giving growth & increase donor commitments.

Donor Growth
• Face to Face
• Digital
• Engage new supporters

BOOSTER 1

Donor Stewardship
• Excel at donor retention & development
• Programme stories & materials
• Compelling funding proposals

BOOSTER 2

Donor Experience
Meaningful emersion in a brand experience "In Your Community"
• Wider engagement
• Purpose, proposition, personality, passion

BOOSTER 3

Sustained ongoing investment and Board/ Executive support is critical, combined with the team drivers below.

| Strong smart analysis/tools | Sound financial stewardship | Right culture & values | Right people, structure & accountability | High performing team | Engaged donor experience & connections |

GOAL 2030

$__M annual income

From $__M in 2020 & $__M in 2022

2025 Targets

__%+ or $__ million unrestricted

2022 = $__M not restricted and not legacies

__,000+ active regular donors from __,000 in 2020

IHC a leader in regular giving with exceptional donor retention, donor servicing and analysis

IHC's MISSION

To advocate for the rights, inclusion and welfare of all people with intellectual disabilities and support them to live satisfying lives in the community.

IHC's VISION

New Zealand is a place where people with intellectual disabilities are valued citizens and part of the community.

- Board signed-off a 2-page 2025-2030 strategy (this was page 2)
- Format the same as our 2020-2025 Strategy (repeat shares/reminders/familiarity)
- Page 1 about 20-25 success, and 25-30 investment required
- Timing of Board approval was key, as we will have a new CEO in 2024

Dashboard – IHC context this is our North Star as we navigate the road map

| I look at this every day (as do team members, and it updates every day). | → | We celebrate milestones regularly, and celebrate with Exec. | → | Shared with every F2F contract my CEO signs off, key decision-making moments. | → | Shared with Finance Team and sometimes Board – The North Star must be familiar and reassuring. | → | Comparing this month to last month and this year to last year lets us know if we are on track |

Analytical Tools – We love Power BI (but these reports are for us and flashed to key management just to impress)

Forecasting Tools

Smile Club Active Donors (green line and right axis) & Investment Returns (bars and left axis) Acutal 08-23 & Forecast 24-30
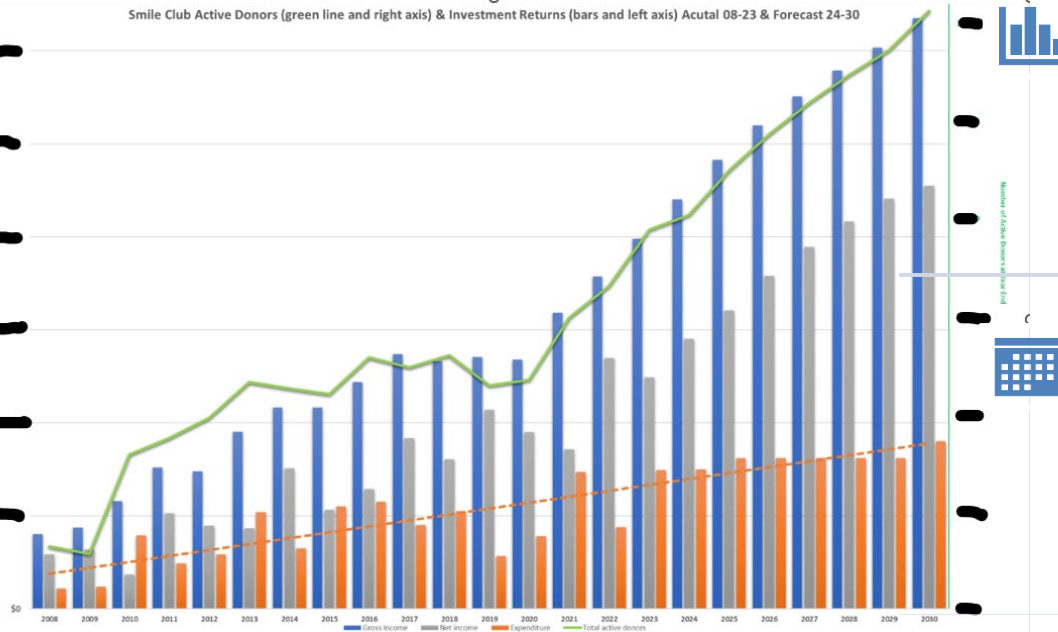
Annual forecasting built accurately into our annual dashboards.

The forecast and then the reality of benchmarking shows **Intent** and validates forecasting formulas.

Long-term forecasting still in Excel. Not ideal as key long-term strategic business decisions are guided by this.

Essential & much more accurate & powerful to build into Power BI = Real data, real costs, real retention rates, individual suppliers and real costs in the forecast mix.

Benchmarking

Such a valuable tool

Track your programme against other charities

Track your own progress, share key insights with senior management & even the Board from time to time.

Understand the market you're operating in

where are other fundraising programmes investing?

How are they performing?

Where could we be doing better?

Finding benchmarks to incentivise ourselves to do better against other programmes or stay the best.

Tracking techniques we have tried to invest in. Hearing from organisations doing it well.
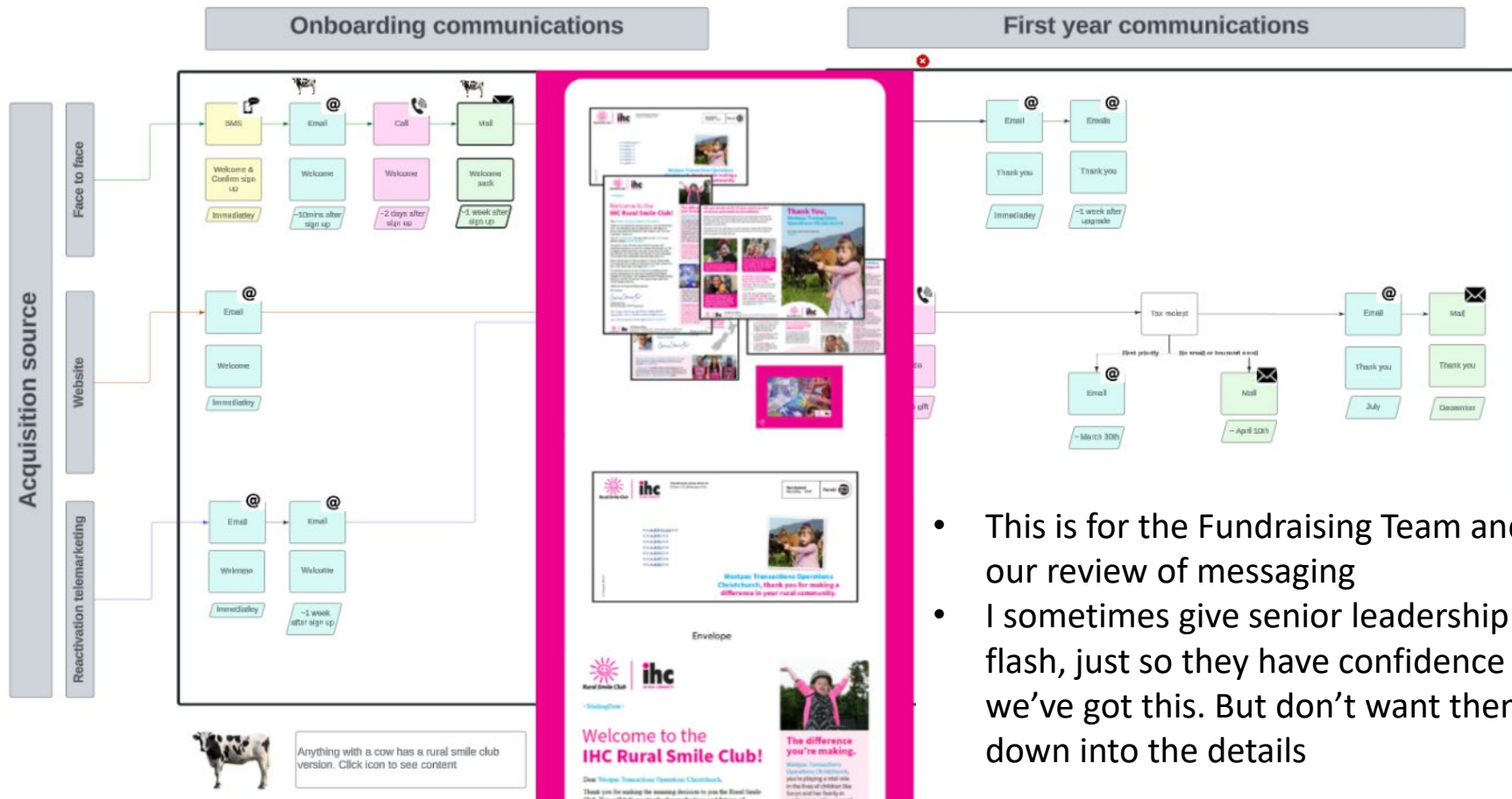
Not just consultants selling their products or creative ideas, real data.

48.2% 51.1% 51.5% 57.5% 59.7%
2018   2020

IHC RG F2F RG retention 1st 12 months
(we're proud of this, best in class). Not quite as good over 13-36 months, so areas we are working on. We plan to get deeper into the Benchmarking data to learn from it.

Compelling Messaging & Journey Automation

- This is for the Fundraising Team and our review of messaging
- I sometimes give senior leadership a flash, just so they have confidence that we've got this. But don't want them down into the details

Thank You from Sarah

Thank you for joining Smile Club.