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Are we there yet?
How the path of professionalism in fundraising sometimes involves taking the road less traveled
By Lilya Wagner, Ed.D., CFRE

More than two decades ago, Robert F. Carbone wrote a seminal piece called Fundraising as a Profession. He listed attributes of a profession and pointed out that fundraising lacked many of these. Some of the attributes he believed all professions should have were a body of research on which to base practice, a code of ethics, certification, a range of literature about—and supporting—the profession, and respect.

In the ensuing years, fundraising has decidedly attained most of the attributes that Carbone believed transformed a practice into a profession. And yet, one of those key factors appears to be missing at times, or at least in dispute. That is respect for the profession. Given some of the perceptions that continue to plague us—and some of these are based in reality, such as unethical practices in fundraising—the thought may occur, however fleeting, “Are we there yet?” In considering this question, the poem The Road Not Taken by the inimitable American poet Robert Frost (1874–1963) comes to mind. The memorable last lines perhaps are symbolic of our dilemma as fundraisers:

I shall be telling this with a sigh
Somewhere ages and ages hence:
Two roads diverged in a wood, and I—
I took the one less traveled by,
And that has made all the difference.

In recent years the fundraising profession also seems to have been facing two roads. The question, “Are we technicians or professionals?” has gained prominence. How do those outside our profession—those who hire us, those who work with us, the general public, government officials, our international colleagues and others—view us? Do we seem like the back-slapping car salesman types or those who follow the pop-psychologist’s 10 easy steps to success and write books like Guerrilla Tactics for the Ask or Fundraising for the Philanthropy Challenged? In spite of all our rich history of fundraising in the United States, why can a dean at a major university still say, “I’ve always considered what you do rather Grim Reaperish and utterly lacking in dignity”? And then there is the board chair who asked, when the fundraiser organized a campaign for the board’s involvement and action, “Why are we doing your job for you?” (read the rest of the article)

This article appeared in the July/August 2012 issue of Advancing Philanthropy. Reprinted with permission.

What Making a Difference Looks Like

We are connected to our communities with what may look like a paper thin connection in some towns and cities. Organizations like Adventist Community Service (ACS) shatter
this perception, and minister to people in ways nobody else can. What do they do, and how do they do it? Where does the funding come from? Can you help and what lessons are to be learned? One small ACS shelter in South Carolina provides some answers and gives us an inspirational glimpse into "What a Difference" looks like to people that need help.

[Click Here to watch the video]

**Will it play in Peoria and beyond?**

*How fundraising ethics here, there and everywhere strengthen the profession, charitable organizations and philanthropy worldwide*

By Lilya Wagner, Ed.D., CFRE

**Some of my growing-up years,** which were erratic at best, were spent in Bolivia. I distinctly recall an American dignitary who had learned Spanish quite well and was speaking to an audience of non-Spanish speakers—members of an indigenous tribe. Therefore he needed a translator. As the speech proceeded, the guest speaker noticed that his audience wasn’t reacting to what he said in the ways he expected. So he stopped and in a low voice asked his translator, “Are you translating what I’m saying?”

The translator looked back at him calmly and innocently, and then replied, “No, but I know what the people need.”

This anecdote typifies both the challenges and the dilemmas fundraisers experience when we apply ethics principles to aglobal practice. We are accustomed to ethics guidelines as they are accepted and implemented in the areas where we work. Here in the United States, for example, we sign the Association of Fundraising Professionals Code of Ethical Principles and Standards and promise to adhere to it. We also generally have at least an awareness of the essential values and ethical behavior statements by Independent Sector (www.independentsector.org):

- commitment beyond self
- commitment beyond the law
- commitment to the public good
- respect for the value and dignity of individuals
- tolerance, diversity and social justice
- accountability
- openness and honesty
- obedience to the law

*(read the rest of the article)*

This article appeared in the March/April 2012 issue of *Advancing Philanthropy*. Reprinted with
Conference on Philanthropy survey results and prize winners

In the last issue of the eDollar, we asked for your help in shaping the 2014 Conference on Philanthropy. Your answers will not only help PSI identify a great location, but they will also shape the kind of conference experience you want and need and that your organization will most benefit from.

Click here to view and download the results of our survey.

As an incentive for completing the survey, PSI selected three random winners to receive prizes, including one winner who will a free registration to the conference (valued at $450). The winners and corresponding prizes are:

- Free Conference Registration: Evonne Crook
- $100 Amazon Card: Ricardo Graham
- $100 Amazon Card: Laura Cummings

Confessions of a Capital Campaign Chair
By Andy Robinson

It's almost 8:00 pm and I am in my hotel room on day four of a ten-day trip. I have spent the last twelve hours facilitating a fundraising training, returning phone calls, checking email, and wolfing down a couple of unremarkable meals.

There's a file before me labeled Beth Jacob Synagogue Capital Campaign. I open it with a mile sense of dread. My call list. the good news: so many prospects. The bad news: so few have been contacted. I am way behind. If I start now, I could talk to a few folks—set up an ask meeting for next month, get a pledge or two over the phone. I could check a few names off the list. Wouldn't that feel good? Or, I could watch something mindless on television. Wouldn't that feel really good? God knows, I've earned it.

I groan, knowing that karma always wins. I spent the day telling people that fundraising is not as difficult as they think. It just requires passion, persistence, and patience. At the moment, I am not doing so great in the passion department, but i pick up the phone anyway. As the Hebrew sage Hillel put it it: If not me, who? And if not now, when?

"Mrs. Bernstein? This is Andy Robinson from Beth Jacob—do you have a moment?"

(Read the rest of the article)
This article appeared in the May-June 2012 issue of Grassroots Fundraising Journal. Reprinted with permission.

Development Workshop

Over fifty higher education fundraisers met September 10-11 on the campus of Loma Linda University for a higher education-specific fundraising workshop. Eva Aldrich, keynote speaker and President and CEO of CFRE International, opened the workshop, presenting research on reporting, benchmarking and performance expectations. For the remainder of the workshop, attendees were responsible for guiding discussions on topics of their choosing including capital campaign planning, working with volunteers and alumni, and strategies for major gift solicitation. PSI would like to thank all of the attendees for their participation, and PSI extends a special thank you to Loma Linda University for their gracious hospitality in hosting the event.

PSI’s Hopkins Creative Idea a Winner

As the organizer of the 2014 Adventist Ministries Convention, Charolett Johnson requested that personnel in the North America Division participate in creating a theme and design for the convention. Paul Hopkins, an associate director at PSI, got into a creative mode and decided to create a theme that was decidedly different from the norm. He coined the phrase “Beautiful Design,” and within that highlighted another message, “Be A Sign.”

He stated his rationale as “Instead of one theme, why not focus the first portion on how unique and beautiful we are (build people up), and use the second part to illustrate that God has used our uniqueness to reflect the Creator...and thus to finish the work. The 'BeUtileful Desig' PDF was a rough draft of that message I submitted for consideration.”

As the idea further developed, the design was finalized by Chip Dizárd. As Paul concluded, “Although our jobs pertain to the ministry of philanthropy, PSI team members are always looking for ways to contribute to the betterment of our church...whenever called and in whichever capacity we can serve.”

Congratulations, Paul. Excellent intersection of collegiality, creativity, service, and team work. We’re proud of you.

PSI Summary of Services

In addition to the information provided in PSI publicity piece and our website,
www.philanthropicservice.com, PSI offers the following services to support our members:

- Internship programs, working in collaboration with educational and healthcare institutions (other organizations upon special request will be considered)
- Library resources, personal referrals for specific needs, selected materials from what is best in the field. An annotated bibliography that is kept up to date.
- A customized fundraising handbook, Successful Fundraising, for pastors, churches and their organizations like ACS and schools. Available through AdventSource. Comes with offer for PSI assistance.
- Grants research.
- Workshops and seminars on fundraising as well as related, relevant topics.
- Links to professional associations. Can interface with them when specific issues and questions come up.
- Referrals to specific experts, sources, organizations, capitalizing on a global, professional network.
- Professional development opportunities. Publishing through PSI’s website. Presenting webinars and podcasts. Valuable for professional development needs such as certification.
- Free webinars and podcasts. Customized offerings available upon request.
- Diversity training, especially in cross-cultural philanthropy. Training for the culturally proficient professional.
- On-site training in fundraising, free of charge.
- Answers to client questions, sent by e-mail or phone.
- Special seminars, e.g., alumni directors, directors of development, media ministries fundraising personnel. Minimal cost and customized training.
- Training and consulting with the Adventist perspective.
- Training and consulting in Spanish, and links to Spanish-language resources and organizations.
- Ties to the premier philanthropy and fundraising organization, the Center on Philanthropy (COP) and The Fund Raising School (TFRS); courses offered through TFRS on occasion.
- Information on faith and giving, and ties to the Lake Institute for Faith and Giving as well as membership in the Christian Leadership Alliance, which provides faith-based perspectives.
- Information on education and training available, including degrees and certificates.
- Assistance in obtaining the Certified Fund Raising Executive designation.
- Effective and easy communication with all clients through the “Dollar,” an e-newsletter, as well as responsiveness through phone and e-mail.
- Information and assistance on developing a culture of philanthropy in organizations.
- Materials and information on non-philanthropic income.
- Capacity building grant—small grant for the extras perhaps not in an organization’s budget.
- Board training workshops and seminars, using material customized for traditional
boards and Adventist boards.

Some alternate topics for workshops and seminars, of current interest and relevancy:

- The culturally proficient professional.
- Using personality type for donor relations.
- Global perspectives on fundraising.
- Donor motivations.
- Planning.
- Current trends in fundraising.
- Ethics in fundraising.
- Careers in fundraising and professional development.
- Leadership, particularly leadership for fundraisers.
- Warning signs of dysfunctional organizations and organizational development and managing change.
- Women and philanthropy.

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**Don Wildman Remembered**

On July 7, The Church and the fundraising community at large lost an inspired visionary and, more importantly, an incredible man. Don was on PSI's board for several years and the director of planned giving at Florida Hospital Foundation for 25 years. Don's life is a testimony to what passionate philanthropy does within a community for institutions and the people who participate. Donations can be made in his name to support the Florida Hospital Epilepsy program. Gifts should be made to Florida Hospital Foundation at 2809 N. Orange Avenue, Orlando, FL 32804.

[Click Here for For the Orlando Sentinel Funeral Notice](#)
[Click Here for Don Wildman Remembered](#)

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**New PSI Brochure**

PSI is pleased to announce the publication of a new brochure, now available as a resource for our members. The 8-page brochure is a comprehensive guide to the valuable services that PSI offers to its members. PSI aims to provide the best, prompt, useful and professional services possible in the areas of:

- Training and education
- Resources
- Consulting
- Communications,
- Customized service delivery
- Networking
Should you hire a fundraising consultant?

by Lilya Wagner, Ed.D., CFRE

Sometimes it's necessary for a pastor and a church committee to acquire the services of a consultant. While Philanthropic Service for Institutions (PSI) can provide many resources and much hands-on assistance such as in planning, training of boards and volunteers, providing sample materials or reviewing your own materials, there are some vital steps in a campaign are beyond the scope of PSI's staff time and resources. Sometimes more hands-on help is needed when implementing specific fundraising efforts.

Hiring a fund raising consultant is a major decision and may have a significant impact on the success of your program. A consultant or consulting firm may provide several types of services, and you will need to determine exactly what your needs are so your money is well spent. For example, if you're engaging in a capital campaign, you may benefit from an objective evaluation process called the feasibility study, which includes internal and external interviews and result in suggestions of whether or not you can raise the amount of money you desire. Other ways that a consultant may be needed are in technical expertise, training of boards and volunteers, evaluating gift markets, helping prepare materials, and in coaching personnel involved in fundraising.

When it is desirable to hire a consultant, first and most importantly, consult with PSI. We keep a list of consultants who have been approved and have a successful track record of working well and understanding faith-based institutions, particularly Adventist. We will advise you on what type of consultant you might hire, what to investigate since you will be paying the bill (this is a business transaction, after all), what questions to ask, how to determine a track record of success, and also give you some referrals. Then you can make an intelligent decision regarding the hiring and use of a consultant.

Who might be a consultant? There are major companies who work with faith-based organizations, there are "solo performers" which are one-person organizations and contract with others as needed, and there are those who position themselves as consultants when actually their experience is limited and credentials are scarce. We cannot urge strongly enough—while consultants are valuable, the services and credentials of consultants vary across the map, literally and figuratively speaking, and if you're not careful, you could be paying for bad advice or even very little service. There is little uniformity among consultants and their services, including their fees; therefore it truly pays to be the knowledgeable and savvy "buyer" of their services.

Successful Fundraising
If you have just purchased the volume, *Successful Fundraising*, you now have a fundraising resource prepared especially for you. If you are planning a building project—a new church, renovation, school building, addition, or other type of building campaign—this volume will assist you in planning and implementation of your project or building.

However, please notice in the "Introduction to the Handbook," page iii, **this book comes with PSI assistance**. We sincerely request that you [contact us](mailto:Lorena.Hernandez@nad.adventist.org) to discuss your plans. The handbook is not designed to be a stand-alone resource but one that entitles you to seek PSI's assistance.

We encourage you to take advantage of this no-cost offer. We will talk to you by phone, send additional materials, make referrals to other professionals or organizations as feasible (such as consultants), and even come on-site if desired and possible. We want to help you maximize the use of this volume.

So please contact PSI at [Lorena.Hernandez@nad.adventist.org](mailto:Lorena.Hernandez@nad.adventist.org) and we will respond as soon as possible. Also, please look at our website, [www.philanthropicservice.com](http://www.philanthropicservice.com) for much more information. We have a dynamic website that includes webinars, a list of PSI resources, an annotated bibliography, and links as well as announcements, articles and much more.

Thank you for purchasing this one-of-a-kind, customized fundraising handbook, and please write or call us ASAP. We look forward to hearing from you.

*Successful Fundraising* is available from AdventSource at [www.adventsource.org](http://www.adventsource.org) or call 800-328-0525

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**Successful Fundraising - Spanish translation**

Great news! *Successful Fundraising* is in the process of being translated into Spanish. Watch for updates in future editions of the *eDollar*.

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**On our website**

**Director's Message**

Be sure to visit [our website](http://www.nad.adventist.org) for the latest Director's Message from Lilya Wagner, in which she shares her unique perspectives and experience. To serve you better, the Director's Message column will now be updated every six weeks rather than quarterly.

You can find her latest update either by following [this link](http://www.nad.adventist.org) or by accessing the About Us dropdown menu at the top of every page. Simply select Director's Message from the menu and click through.
Need to hire a consultant?
Ask PSI for guidelines on getting the best for your money.

There are times in the planning or managing of fundraising or a campaign when you may require the services of a consultant. But hiring a consultant is a major decision and may have a significant impact on the success of your program, never mind your budget.

There are many good consultants out there, and some that may not be of much help. If you need assistance beyond what PSI can do for you, we can help you find a consultant. We have an approved list of consultants who have proven experience with faith-based organizations.

We will refer you to approximately three from which you can choose. Then we can send you guidelines on hiring a consultant. Please contact PSI for help in this area so that your results and your budget are both favorable.

Doubling Your Dollar

Be sure to visit our website to check out Doubling Your Dollar, a new feature in the right sidebar. As a supplement to our eDollar newsletter, it will be updated weekly with links to useful articles and information from the world of philanthropy.

CFRE discounts

It is very important when registering online for CFRE that our constituents refer to a drop down list to select PSI as the member organization so they can receive the $165 discount. If you do not select PSI, you will not receive this discount.

As of April 1st the CFRE certification fee increased to $815. When staff from a PSI member organization takes the CFRE exam, they are entitled to receive this $165 discount (for initial certification; $100 discount for re-certification) directly through CFRE. When they pay the $650 balance of the fee, PSI will reimburse half of that, or $325. After the CFRE discount and the PSI reimbursement, they will end up paying just $325 (40%) and save a total of $490 (or 60%).

For more information on personal reimbursement of exam fees CLICK HERE to contact Lorena Hernandez or call (301) 680-6133.

To learn more about certification CLICK HERE to visit the CFRE International Web site.

PSI congratulates Jim Pinder on the publication of his manuscript
Please join PSI in extending congratulations to Jim Pinder on the publication of his manuscript *Development Professionals at Religiously Based Nonprofit Organizations: Why They Leave and How to Improve Retention*. SAGE Open Publications is the publisher.

An abstract: The study of why a fundraising professional would choose to leave his or her employer is critical to the ongoing success of religiously based nonprofit organizations as they work to achieve their mission. Without continuity in the donor relationship, donors will likely leave the organization or become disenfranchised. This study focuses on development professionals at Seventh-Day Adventist institutions across North America. The results of this study are applicable to other religiously based nonprofit organizations. The present article reveals the reasons affecting employee retention and proposes approaches to mitigate the loss of valuable employees. Data were gathered using a structured online survey and analyzed for its descriptive outcomes.

Click here for the full text

**Jim Pinder** is director of academic affairs and assistant professor in the School of Pharmacy at Loma Linda University. His research interests include employee retention and team-based learning in the classroom.

Reprinted courtesy of SAGE Open Publications and Jim Pinder.

**Resources**

**11 Rules for Video Fundraising**

If you use video in your fundraising campaign, you know that it can be an easy and effective way to tell a story and capture the attention of your supporters. But how does video fit in your nonprofit’s fundraising strategy? [Apply these 11 essential guidelines to get the most out of your video efforts.](#)

**From the bookshelf**

**How to Write Fundraising Materials That Raise More Money**

by Tom Ahern

Reviewed by John Huynh, Development Director of Breath of Life TV

How can you make your appeal letters more effective? According to *How to Write Fundraising Materials That Raise More Money* written by Tom Ahern, donors are more willing to give more when your fundraising materials are donor centric. The author points out that often times appeal letters are written to celebrate the organization rather than
celebrating the donors. Donors need to know the magnitude of the impact they are currently making for an organization.

Along with developing a donor centric letter, another key feature of a successful appeal letter is to write a letter that appeal to readers’ emotions. The author points out that in general, people like to feel good and warm. He gives specific examples of how a writer can use anger, exclusivity, fear, flattery, greed, guilt, and salvation to compel the reader to respond. Throughout the book, the author provides us with sample letters that are filled with emotional triggers.

Ahern further makes the case that often times our appeal letters are never read because they are not controversial enough. The “controversy” the author is referring to is the content of the letter or a headline that will cause the reader to think twice before throwing the letter away. The author states that a crucial component to a successful letter is to share with readers’ new information that is unique rather than conveying the same topics as other organizational mailings.

Although the book is purposely written in an easy to understand language and can be read in one sitting, the strategies given are in no way only restricted to an entry-level organization. Non-profit organizations of all sizes will learn to appreciate the techniques that are presented. There is a sufficient amount of techniques that will take a fundraiser an entire year to integrate.

While the book is written for individuals who specifically want to improve their appeal letters, the concepts can be applied to all written materials regarding fundraising. Much of the techniques can be applied to newsletters, emails, websites, case statements and advertisements. It is a must-read book for all fundraisers who are seeking to drastically improve their overall annual giving program.

The Only Grant Writing Book You’ll Ever Need
by Ellen Karsh and Arlen Sue Fox

Reviewed by Marci Scott, Assistant Director of Alumni and Development at Monterey Bay Academy

The Only Grant Writing Book You’ll Ever Need is a complete guide to developing a winning program, finding funders, writing proposals, and what to do after a successful or unsuccessful proposal. The book, written by two experts who have won millions of dollars in grants, also outlines examples of unsuccessful grant writing and how to create a budget that will make sense to a prospective funder. (A side note: I used the techniques described to successfully apply for a grant from The Versafund.) Filled with examples, charts, and checklists, this book is a must-have for both aspiring or entry level grant writers and program staff since it explains how programs affect the grant-seeking process. This book gets an A.