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PSI Makes Fundraising Fitness Test Available to All Adventist Institutions

by Randy Fox

PSI is playing a key role in the development of a powerful new fundraising self-assessment tool, the Fundraising Fitness Test (FFT). It is a Microsoft Excel-based tool that makes year-to-year comparisons that speak volumes about the health of fundraising programs. The tool and guidance in its application is now available to all Adventist institutions.
The FFT also is the focus of a just-formed alliance between PSI and the Florida-based Adventist Health System (AHS) to use performance analytics to measure impact of performance improvement initiatives in fundraising programs.

Dr. Lilya Wagner, CFRE, director of PSI, has appointed Alphonce Brown, Jr., ACFRE, former Chair of the Association of Fundraising Professionals (AFP), and president of Docere Consulting, to provide oversight for the PSI healthcare project. Brown will work with Wagner and PSI Business Manager Randy Fox, who has played a key role in development of the tool and manages PSI's Fundraising Fitness Test program.

“The Fundraising Fitness Test is important because it will benefit every PSI client and enable increased support for the ministries of the Seventh-day Adventist Church,” said Dr. Wagner. She noted that Brown will also head a panel of seven practitioners, drawn from a select group of 102 professional fundraisers... (Read More Here)

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**Next Conference Registration Cutoff: Ends April 15th!**

If you want the best available rate for The Conference on Philanthropy, please register soon. **Now, through April 15th, the regular conference rate will remain at $545.** On April 16th, the rate will increase to $615. This conference experience was built with you in mind, and centers on best practices and research that is important to you, to give you what you need to achieve success for you and for your organization!

Visit [www.psiconference.org](http://www.psiconference.org) to register for the conference, see an increasing list of presenters and tracks, and plan an exciting number of things to do while in Baltimore. You can also go directly to the registration page by [clicking here](http://www.psiconference.org).

We can't wait to see you!

*The PSI Conference Planning Committee*
PSI's "Free" Pre-Conference Webinar Series

PSI recently hosted two free pre-conference webinars featuring Gail Perry, of Gail Perry Associates, and Marcy Heim, The Artful Asker. You can watch both in their entirety below.

Gail and Marcy are two of the featured speakers PSI is partnering with before the conference so that you can get a sense of the quality and depth of the presenters that will be onsite and available for the 2014 Conference on Philanthropy (June 25-27).

Our next "free" pre-conference webinar is hosted on Tuesday, April 22nd, at 1pm EDT by Simone Joyaux. She will be joining you to talk about "Mission & Customer Centered Fundraising as a Staff."

To register, please visit the following link. **Space is limited**, so do it now: [https://www1.gotomeeting.com/register/445015377](https://www1.gotomeeting.com/register/445015377). If you've already used GoToWebinar on your computer, or joined us for the Gail Perry or Marcy Heim events, then log on at 1pm. If you haven't, then give yourself at least 15 minutes before we start to set-up.

- **Simone Joyaux** (04/22/2014 at 1pm-1:30pm EDT)
  "Mission & Customer Centered Fundraising as a Staff"
  [Click Here to Register](#)

- **Gail Perry** (03/17/2014 recording)
  "How to Fire Up Your Board For Major Gift Fundraising"
  [Click Here to Watch](#)

- **Marcy Heim** (04/02/2014 recording)
  "Three Massive Mistakes Even Smart Fundraisers Make Raising Major Gifts."
  [Click Here to Watch](#)

Please visit [www.psiconference.org](http://www.psiconference.org) to see these speakers' topics and session times, as well as to register to the conference and hotel. **The regular registration rate cutoff is April 15th, so don't wait.**

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**Healthcare Series: Social Media for Nonprofits**

We continue our healthcare podcast series with Director of Development at ADRA International, Chris LeBrun, MBA, CFRE. Social Media is a topic that is universally important to hospitals, ministries and schools. Chris wants to know if you are using it in the most beneficial ways for you institution, if at all. Spend the next 30 minutes learning its untapped potential, strategies you can use, ways to measure success, myths, dos and don'ts....as well as great resources to take it up a level.
The challenges of healthcare philanthropy are well known. Internal and external pressures come in equal measure...with everything from physician involvement, to Hippa, and ROI request that would make even some of the most seasoned VPs of Advancement gasp. We will continue over the next several weeks with healthcare series of podcasts that will be both informative and inspirational in your quest for success.

- Watch the Social Media Podcast by Clicking Here

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**Study Group Convenes to Address Fundraising at the Conference Level**

by Lilya Wagner

As conferences within the North America Division begin to implement fundraising, or investigate how fundraising could function within their territory, questions have arisen as to how fundraising should be accomplished. Some conferences have undertaken fundraising with success, others have struggled and some have even abandoned the effort. Therefore the all-important question has arisen—what should be a conference’s role in fundraising for its institutions and its members, and what would a successful fundraising program look like?

Philanthropic Service for Institutions (PSI) has been asked these questions with increased frequency. In an attempt to provide beneficial advice to conference leadership, PSI convened a representative group to discuss these issues and possibilities and provide recommendations for successful fundraising. On March 12, 2014, this group met and spent the day considering the pros and cons, the possibilities, and models for successful practice. A report and recommendations, the result of that group’s collective thinking, is under preparation and will consist of the following sections:

- Fundamental concepts and concerns.
- Rationale for fundraising at the conference level.
- Pros and cons of conference fundraising.
- Before you start.
- Elements contributing to a successful program.
• Pitfalls—what can go wrong and preventing problems.
• Additional considerations.

The report is offered by the committee convened for the purpose of studying fundraising at the conference level. While based on ...

(Read More Here)

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**Publicación “Recaudación de Fondos” disponible en español**

by Lorena Hernandez

Successful Fundraising available in Spanish. If you would like more information about the contents of this article or how to obtain Successful Fundraising in Spanish please contact:

Lorena.hernandez@nad.adventist.org

La publicación de Servicio Filantrópico para Instituciones (SFI, por sus siglas en español) “Recaudación de Fondos” ya está a la disposición del público hispano. Las iglesias, distritos, y conferencias pueden usar este material para recaudar fondos.

Este ejemplar fue hecho para ayudar a las organizaciones de nuestra iglesia con métodos y practicas éticas en recaudar fondos.

Varios contribuyentes profesionales y con capacitación en diferentes áreas han unido sus esfuerzos para poder traerles un material práctico y específico en el tema de la filantropía.

SFI le agradece al Pastor Ernesto Castillo por incluir este punto en su agenda del Seminario El Centinela, en Miami, Florida. En esta reunión, que se llevó acabo el 31 de enero de 2014, Lorena Hernández, Asistente de Oficina para SFI, promovió este material a los líderes hispanos. Su presentación incluyó un video clip del Pastor Tulio Peverini, editor jubilado de El Centinela y traductor del manual.

- Para Leer Mas Oprima Aquí
- Para Ver El Video Clip Oprima Aquí

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**Does Fundraising Actually Work in Adventist Academies?**
This is a fair but complex question for which there is no simple ‘yes’ or ‘no’ answer. Academies across North America are reporting increases in giving and more academies have established successful fundraising programs staffed with professional fundraisers. Yet while some school fundraising programs flourish, other flounder. Why is that? In our schools, as with all nonprofit organizations, many factors determine the degree to which philanthropy will succeed.

So what are those factors? While each school is unique, after eight years working with and talking to dozens of academies, a pattern has begun to emerge. These factors can perhaps best be understood in three categories. They are: the role leadership plays in fundraising; the approach taken to fundraising planning, goals and timelines; and staffing.

Arguably the most important determinant of a school’s long-term success is the degree to which school leadership (particularly but not limited to principals and board members) understand philanthropy and their role in the fundraising process. While leadership engagement is important in organizations of all sizes, it is particularly crucial in smaller organizations which do not have the staffing or budget to compensate for uninvolved leadership. Schools with strong philanthropy programs also tend to have... (Read More Here)

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Conference on Philanthropy: CFRE Review, Baseball and Hotel Shuttle

CFRE Review:
Have you thought about taking the CFRE exam? Uncertain as to what to expect? Philanthropic Service for Institutions, in partnership with the AFP Maryland Chapter, is offering a CFRE Review on Tuesday, June 24 from 8:30 am -4:15 pm at the Sheraton Inner Harbor Hotel in Baltimore, Maryland.

Attendees will learn about the CFRE exam and eligibility requirements, receive valuable planning and study tips, and hear from experts as they present an overview and important information on the six areas of fundraising covered in the CFRE Exam.

The registration fee for this one-day event is $45 and includes materials and light refreshments. To register with a credit card please contact Lorena Hernandez at (301) 680-6133. For additional payment options call or email Lorena at Lorena.hernandez@nad.adventist.org. For questions or to learn more about the review please contact Kristin Priest at Kristin.priest@nad.adventist.org or call (301) 680-6134.

For more information about the CFRE exam or to begin your application process, go to www.cfre.org to learn more.

Baltimore Orioles Baseball:
Join your fellow conference attendees Wednesday, June 25, at 7:05 pm as the Baltimore Orioles take on the Chicago White Sox at historic Camden Yards located just blocks from the conference hotel. PSI has secured group, discounted tickets through (Read More Here)

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**A Case for Database Development in the Church: Membership Engagement, Revenue and Big Data Warehousing**

by Paul Hopkins

The Seventh-day Adventist Church of North America has an opportunity to grow with its membership. The suggestions offered within these pages are not an end-all to many of the issues and struggles we face as a church, but do cover three very important components that must be addressed going forward and that tie into an online database solution.

- How can we engage Seventh-day Adventists in meaningful ways?
- How can we further Church initiatives with a more reliable funding stream and volunteer core?
- How can we deeply understand our membership?

An aging membership base is looking for volunteer opportunities and meaningful ways to spend their discretionary income within the Church. This same group is gradually becoming overwhelmed by the sheer number of vehicles used by Church ministries and institutions to convey needs. At the same time, a growing number of Adventist youths see the Church as increasingly... (Read Part One Here)

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**Grant Searches Done Right**

One of the least understood fundraising tools that you have at your disposal is more accessible than you might think. Utilizing a Grant Search has two parts: (a) Being able to search for or having a search done for several different types of Grants and (b) Gaining the knowledge on the art of Grant Proposal Writing.

Join PSI Staff member Mark Lindemann on the points of getting a search done and what steps are involved. He'll be joined by Stefanie Johnson, Director, Grant Management at Adventist University of Health Sciences on the art of creating the right proposal to submit.

Visit [www.philanthropicservice.com](http://www.philanthropicservice.com) on May 7th to view the upcoming podcast. You can also contact Mark at mark.lindemann@nad.adventist.org with questions.
Stewardship Leaders: A Guide for the Local Church

A book that needed to be written, *Stewardship Leaders* covers a lot of ground but isn't too heavy to keep you from reading through it. The 80-page book does a great job of covering the foundations of stewardship, as well as the practical elements of when and how to successfully promote stewardship in our churches.

The book also covers philanthropic topics (church capital campaigns), and planned giving areas (estate planning) with the same care found throughout the book.

The second half of the book goes beyond the history a mission of stewardship and into surveys that will help you understand your members better, and other material to help you develop a church budget.

Contact [John Mathews](mailto:john.mathews@igivesda.org), the North American Division Stewardship Director, for more information on how to get your copy. You may also visit their website at: [http://www.igivesda.org](http://www.igivesda.org)
PSI Makes a Fundraising Fitness Test Available to All Adventist Institutions

By: Randy Fox

PSI is playing a key role in the development of a powerful new fundraising self-assessment tool, the Fundraising Fitness Test (FFT). It is a Microsoft Excel-based tool that makes year-to-year comparisons that speak volumes about the health of fundraising programs. The tool and guidance in its application is now available to all Adventist institutions.

The FFT also is the focus of a just-formed alliance between PSI and the Florida-based Adventist Health System (AHS) to use performance analytics to measure impact of performance improvement initiatives in fundraising programs.

Dr. Lilya Wagner, CFRE, director of PSI, has appointed Alphonce Brown, Jr., ACFRE, former Chair of the Association of Fundraising Professionals (AFP), and president of Docere Consulting, to provide oversight for the PSI healthcare project. Brown will work with Wagner and PSI Business Manager Randy Fox, who has played a key role in development of the tool and manages PSI's Fundraising Fitness Test program.

“The Fundraising Fitness Test is important because it will benefit every PSI client and enable increased support for the ministries of the Seventh-day Adventist Church,” said Dr. Wagner. She noted that Brown will also head a panel of seven practitioners, drawn from a select group of 102 professional fundraisers who have earned the ACFRE or FAHP credentials that are the highest marks of distinction in the profession. “That panel, chartered as the Growth in Giving Analytics Advisory Board, will interpret the FFT data and recommend evidence-based ways of improving fundraising performance,” said Dr. Wagner.
The *Fundraising Fitness Test* concept was developed by Bill Levis, who serves as an Urban Institute Affiliated Scholar at the Center on Nonprofits in Washington, DC. The self-evaluation tool has been beta tested and refined by Levis and Fox over the last 18 months.

Levis credits Fox with much of the development of the tool beyond the basic concept. “It would not have happened if it weren’t for Randy Fox and PSI,” said Levis, who also noted that Fox has been named Director of the Growth-In-Giving Initiative Fundraising Fitness Test Group by the Initiative’s steering committee.

Fox said the opportunity to work with Levis was a “Golden Opportunity to both further the profession and add value for PSI’s constituents.”

“Many studies have shown that institutions that have more full-time seasoned development professionals actively pursuing prospects raise significantly more money, so having adequate staff to solicit prospects and improve retention rates is the wisest investment your organization could possibly make,” said Fox. “Yet many institutions still focus on efficiency, rather than effectiveness—not investing in fundraising productivity, because they don’t seem to understand that it takes dramatically more time and money to gain a new donor than to retain a current donor,” he said.

He believes that the *Fundraising Fitness Test* has the capacity to help Adventist institutions increase philanthropic support by improving the gain/loss retention ratios for both donors and dollars. He noted that data from the AFP Fundraising Effectiveness Project (FEP) shows a nationwide eight-year flat gain/loss retention ratio, resulting in no fundraising gains. “It has been conservatively estimated that that just a 10% improvement in donor retention could lead to a 150% increase in the lifetime value of an individual donor,” said Fox.

The *Fundraising Fitness Test* is an open-source tool that was downloaded 800 times in the 90 days since it was uploaded to the AFP website in mid-December. Using several
years of data that is easily exported from any fundraising database, the fitness test
employs a series of algorithms to generate a variety of reports that assess donor loyalty,
year-to-year growth-in-giving and a variety of other key indicators of a fundraising
program’s effectiveness. Only three data points are required: unique donor identifiers
(not donor names), the amounts and the dates of gifts tied to those identifiers.

Levis choose to develop the fitness test using a powerful spreadsheet with multiple
macros rather than a more conventional platform with “hard-coded reports” in order to
create a dynamic, multi-dimensional analytic tool for data-informed, growth-oriented
planning and budgeting decisions for fundraising programs.

“The basic idea,” he said, “is that all the gain/loss performance statistics can be
generated from just three gift-transaction data fields that can be extracted according to
the criteria of your analysis.” As an example, he pointed out that the analysis can be
based on cash receipts, including every cash gift and pledge payment—but excluding
pledges—or the analysis can be based on commitments, including cash gifts and
pledges—but excluding pledge payments.

“A single all-gifts extract can generate an almost limitless number of analytics—one
focused on donor retention, another on acquisition, a third on attrition, a fourth on
upgrading, and so forth,” Levis said. Further “sub-set” gift transaction extracts for such
activities as annual giving, special events and major gifts can be inserted into various
FFT templates, according to Levis.

“Once the simple gift-transaction extraction procedure has been implemented, making
use of the FFT on a regular basis is easy and reliable,” he said. “And, it is entirely
independent of whatever gift and donor-record keeping software an organization uses.”

To demonstrate the potential for the gift-transaction data analytics, Levis created a
comprehensive set of over 150 indicators that are generated by inserting gift transaction
data into the core template. The FFT tool is able to generate all the statistics developed
from 2006 to 2013 for the annual FEP Survey plus an almost unlimited number of additional indicators and benchmarks.

The PSI *Fundraising Fitness Test* was featured as part of AFP’s [Growth in Giving Analytics Initiative](#) in the recent issue of *Advancing Philanthropy*, the AFP magazine circulated to 30,000 members around the world. The PSI initiative is an important component of this comprehensive charitable giving project involving many nonprofit partners. Fox and Levis are among nearly 30 leaders of separate but inter-related projects who have voluntarily committed to improving fundraising performance through the use of the FFT.

The PSI partnership with AHS grew out of a March 31st meeting when a team from PSI was invited to Orlando by Mack Rucker, Jr., FACHE, vice president for corporate relations, to meet with AHS chief development officers. The PSI team focused its presentation on how the software works, how it can be used to make informed strategy adjustments and to set realistic goals for both growth and retention.

**Steven Reed, a fundraising performance improvement consultant** who was part of the presentation team, commented, “This brilliantly simple approach to analytics has the potential to completely change how performance data is generated and used.”

Fox noted that the *Fundraising Fitness Test* is a work in progress and there is much more on the drawing board. “PSI completed a successful case-study of FFT use with the [Hope Channel](#) media ministry last year, but we need input from AHS chief development officers to significantly expand and improve the usefulness of this performance analytics tool,” he said.

Fox listed the key components of AHS pilot project as:

1) Create an advanced custom AHS version.
2) Build standardized reports based on the best indicators for healthcare.
3) Extract data monthly, segmented by program codes, make proactive adjustments.

4) Use the Growth in Giving Calculator to justify growth-oriented fundraising budgets and measure effects of incremental increases in fundraising budgets and FTEs.

5) Work together closely for a year to document improvement.

Fox emphasized that the Fundraising Fitness Test is designed as a self-assessment tool. “However,” he said, “if hospitals want to compare their performance they can share data sets with one another.” He also noted that hospitals could ask PSI to compile an aggregated Adventist Healthcare Philanthropy Database that individual hospitals could benchmark against. He said another option is to compare individual institution FFT numbers against those of an aggregate of 3,200 nonprofits that completed the FEP survey.

The Growth in Giving Initiative is also in the process collecting gift-transaction data from donor software providers that will be contained in an open-source national database. Fox said that database will be used to form an index that can be used to study national trends in giving (like the 500 fastest growing charities). Sub-indices can also be created by linking gift-transaction data to the organization’s NTEE code and three-digit zip code to create spatial analysis of historical fundraising patterns for organizations in certain geographic areas or across organizations of different types with substantive focus.

PSI now requires any institution seeking fundraising financial assistance to submit FFT gift-transaction data on a confidential basis to establish a baseline that can be extracted annually for three years to track growth.

Kristin Priest, CFRE, associate director of PSI who interprets reports and provides counsel for educational institutions and ministries says, “The Fundraising Fitness Test provides deeper insight into the health of development programs better than anything else I have used, which helps me gauge the institutional capacity to raise more money,
so I can provide accurate and actionable advice. It also will provide data on improved performance proving that financial assistance given was a wise investment of funds from the North American Division Treasury.”

A webinar video demonstrating how to use this tool, entitled *Introducing Two New Tools to Improve Donor Retention*, is on the PSI website at philanthropicservice.com

Please contact Randy Fox at randy.fox@nad.adventist.org or 301-680-6135 if you want to receive the Fundraising Fitness Test program files and instructions so you can begin using this tool to improve your own development program. PSI is deeply grateful to Mr. Levis for his expertise and for donating his time to PSI for the benefit of our clients and constituents.
Study Group Convenes to Address Fundraising at the Conference Level

As conferences within the North America Division begin to implement fundraising, or investigate how fundraising could function within their territory, questions have arisen as to how fundraising should be accomplished. Some conferences have undertaken fundraising with success, others have struggled and some have even abandoned the effort. Therefore the all-important question has arisen—what should be a conference’s role in fundraising for its institutions and its members, and what would a successful fundraising program look like?

Philanthropic Service for Institutions (PSI) has been asked these questions with increased frequency. In an attempt to provide beneficial advice to conference leadership, PSI convened a representative group to discuss these issues and possibilities and provide recommendations for successful fundraising. On March 12, 2014, this group met and spent the day considering the pros and cons, the possibilities, and models for successful practice. A report and recommendations, the result of that group’s collective thinking, is under preparation and will consist of the following sections:

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• Pitfalls—what can go wrong and preventing problems.
• Additional considerations.

The report is offered by the committee convened for the purpose of studying fundraising at the conference level. While based on knowledge of the profession, consideration of best practices, research on giving and the donor/church member, and actual experience, it is readily recognized that one model doesn’t fit all conferences. Therefore the report should be considered as a basis for adaptation to individual situations within conferences. The report will be distributed to conferences as soon as possible and will be available from PSI.

Meeting participants—representatives of conferences and their institutions

Rick Russell, Treasurer, Carolina Conference
Janesta Walker, Marketing & Development, Asheville-Pisgah Christian School, Carolina Conference
Phil Bond, Director of Development & Planned Giving, Trust Services, Florida Conference
Leslie Louis, President, Carolina Conference
Ed Barnett, President, Rocky Mountain Conference
Jackie Phillips, Capital Campaign Director, Central California Conference
Fonda Cox, Director of Development & Marketing for Education, Oregon Conference
Bill Gerber, Development/Camp Director, British Columbia Conference
Lynn McDowell, Director, Planned Giving & Trust Services/Philanthropy, Alberta Conference
Claude Morgan, Associate Corporation Secretary, Greater New York Corporation
Peter Casillas, Associate for Pastoral Ministries for Evangelism & Church Planting
Potomac Conference Corporation

Judith Mason, Superintendent of Education, Central States Conference

Sean Robinson, Director for Disaster & Crisis Management with Adventist Community Services of the NAD, Formerly of the Texico Conference

Ed Sharpe, Treasurer, Maritime Conference

Larry Marsh, Vice-President for Education, Upper Columbia Conference of SDA

Rick Remmers, President, Chesapeake Conference

Janice Da Silva, Development Associate, Greater New York Conference

Elias Zabala, Sr., Secretary/Treasurer, New York Conference

Jeff Potts, Executive Secretary, Manitoba-Saskatchewan Conference

Carmelo Mercado, General Vice President of the Lake Union,

Ken Denslow, Assistant to the President of the NAD and session moderator

Alvin Kibble, Vice President of the NAD

Lilya Wagner, Director of PSI

Kristin Priest, Associate director of PSI

Lorena Hernández, PSI Office Assistant

Mark Lindemann, PSI Client Services Coordinator
Does fundraising actually work in Adventist academies?

This is a fair but complex question for which there is no simple ‘yes’ or ‘no’ answer. Academies across North America are reporting increases in giving and more academies have established successful fundraising programs staffed with professional fundraisers. Yet while some school fundraising programs flourish, other flounder. Why is that? In our schools, as with all nonprofit organizations, many factors determine the degree to which philanthropy will succeed.

So what are those factors? While each school is unique, after eight years working with and talking to dozens of academies, a pattern has begun to emerge. These factors can perhaps best be understood in three categories. They are: the role leadership plays in fundraising; the approach taken to fundraising planning, goals and timelines; and staffing.

Arguably the most important determinant of a school’s long-term success is the degree to which school leadership (particularly but not limited to principals and board members) understand philanthropy and their role in the fundraising process. While leadership engagement is important in organizations of all sizes, it is particularly crucial in smaller organizations which do not have the staffing or budget to compensate for uninvolved leadership. Schools with strong philanthropy programs also tend to have leaders, and in particular principals, who understand fundraising best practice. While a part of this includes participation in fundraising, of equal importance is their ability to foster a spirit of philanthropy as an integral part of the school and not a quick fix and support realistic fundraising planning and staffing.

A second factor is the understanding and expectations around planning and goals setting. Too often fundraising efforts look a bit like attempting to fix a broken leg with a band-aid or assuming one can run a marathon without any preparation. If a school has not regularly kept in touch with their constituents, not only is fairly safe to assume that contact information is out of date, but it also means that the relationship between the individual and the school has weakened. Unfortunately some schools do not take into consideration the extensive time and cost associated with updating a database that has been neglected for years. As one successful academy fundraiser stated, “Fundraising is data-based. It’s the driver of all we do. Thankfully my administration and board have supported the necessary actions to keep our data as up-to-date as possible.”

This is not to say that schools without up-to-date donor records and alumni addresses are doomed to failure. On the contrary, many schools have successfully launched fundraising programs without these things in place provided there are reasonable expectations regarding the time and money needed. Successful fundraising happens when the discussion starts not with how much money the school needs but rather what the school’s current ability is to raise funds.

The final factor tends to be staffing – the human resources. This tends to play out in two different ways. First, there is the challenge of the lack of experience fundraisers. It is not uncommon for a school’s principal, board, and other key leaders to understand their role in fundraising, commit to the time necessary to establish a program, but find there aren’t available fundraisers to hire. The successful alternative tends to be hiring individuals with a passion for the school and a willingness to learn. The second staffing issue was touched on earlier. Fundraising succeeds when there is a clear understanding that, while fundraising department needs to work with marketing and recruiting efforts, these responsibilities cannot all be rolled into one job.
description. Fundraising succeeds when a realistic job description is in place. This not only ensures a fundraiser who has the time to effectively execute a comprehensive fundraising program, but also prevents burnout which is one of the key factors in high staff turnover.

How can PSI help schools fundraise?

To support elementary and academy fundraising, PSI offers training and consultation, resources, mentorship, and grants designed to help support schools wishing to start or expand a fundraising program.

PSI staff or other recommended fundraisers can come on site, discuss with you your fundraising objectives and existing resources. Based on your unique goals and abilities, an open conversations will take place regarding current goals, if they are realistic, and what financial and volunteer involvement might be required. If the school wishes to continue, PSI can offer resources such as sample fundraising plans, volunteer job descriptions, and articles on recent fundraising tips and trends. We are also building up a pool of mentors with a successful track record in academy and/or small shop fundraising who are paired up with individuals new to fundraising.

Because PSI believes in the potential for fundraising in elementary and secondary education, we offer the Model for Academy Philanthropy (MAP) grants. These grants are either a one-time, reimbursement based grant or a three year academy development program depending on which grant a school applies for. These grants are designed to help schools without a current fundraising program establish the components for a successful development department. All funds are awarded following the successful completion of that year’s MAP requirements. These objectives will be fulfilled through training, resources and on-site support by PSI.

More information on PSI resources including MAP grants can be found on our website at www.philanthropicservices.com or by contacting Kristin Priest at kristin.priest@nad.adventist.org or calling 201-680-6134.

AS SIDEBAR OR SEPARATE-BUT-RELATED ARTICLE?

Tips and suggestions for schools considering starting a fundraising program (from academy fundraisers and principals who’ve been there)

- Make sure everyone is on board. This isn’t the time to ‘go it alone’ unless you’re just looking for money for a quick, one-time project.
- Talk to other schools that are doing it right. You’d be surprised at how much they’re willing to share.
- Actually write down a plan and figure out who is going to do what. Include time to train your volunteers.
- Check with your conference. Some have existing policies you’ll need to follow. These policies can also take out some of the work of recreating the wheel.
- Stop only communicating about what’s going on at the school. Your product is your graduates. Share stories of their successes. Make it about them, too.
• Start with vision. It’s hard to rally people to needs and wants. It’s much easier to generate support for a clearly articulated, agreed upon vision that can be shared with constituents.
• Pray.
CFRE Review

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Join your fellow conference attendees Wednesday, June 25, at 7:05 pm as the Baltimore Orioles take on the Chicago White Sox at historic Camden Yards located just blocks from the conference hotel. PSI has secured group, discounted tickets through the Sheraton Inner Harbor, the Orioles’ official hotel. Come join your peers, cheer on the Orioles, or just take advantage of great ballpark food!

These third base seats are available for just $26.50 per person but must be purchased through PSI to secure this special rate. To reserve tickets with a credit card please contact Lorena Hernandez at (301) 680-6133. For additional payment options call or email Lorena at mailto:Lorena.hernandez@nad.adventist.org.

For more information about this or other conference events please contact Kristin Priest at mailto:Kristin.priest@nad.adventist.org or call (301) 680-6134.

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A Case for Database Development:

Membership Engagement, Revenue and Big Data Warehousing

Paul Hopkins
Uncertain Future?

The Seventh-day Adventist Church of North America has an opportunity to grow with its membership. The suggestions offered within these pages are not an end-all to many of the issues and struggles we face as a church, but do cover three very important components that must be addressed going forward and that tie into an online database solution.

- How can we engage Seventh-day Adventists in meaningful ways?
- How can we further Church initiatives with a more reliable funding stream and volunteer core?
- How can we deeply understand our membership?

An aging membership base is looking for volunteer opportunities and meaningful ways to spend their discretionary income within the Church. This same group is gradually becoming overwhelmed by the sheer number of vehicles used by church ministries and institutions to convey needs.

At the same time, a growing number of Adventist youths see the Church as increasingly irrelevant in their day-to-day lives. The top-down mandate/management model is out of touch with how Gen-Xers and Millennials relate to the world. Both of these groups want a strong Church but need a voice in determining how they will help and in what manner.

As desperately as members want to connect with the institution, the Church continues to look for ways to connect with its membership, raise money, and understand the habits and interests of the greater body. We think that we know what our members want, but do we? And if not, what hope is there for sustainability?

I’m suggesting that the Church build a single web portal that focuses on volunteerism and philanthropy, an online content repository and social collaboration hub that offers choices to individuals, additional funding to organizations, and answers to the Church about who our members are and what they care about. This would all take place within a community that many of them already inhabit: the Internet.

Engage your members with great opportunities, and they’ll often donate and/or volunteer. Process those actions in a controlled environment, and you will better understand the member’s needs. Know the needs, and you will understand how to engage members better.
ENGAGING OUR MEMBERS:

The Diffusion Model and the Technology Cycle

Sociologists describe the way a catchy idea becomes popular as “diffusion,” a theory that Everett Rogers popularized in the 1962 book *Diffusion of Innovations*. The earliest research was used to track purchase patterns of Iowa hybrid corn growers, and then was expanded upon by Rogers to describe how new technologies and innovations can catch on. If one accepts the notions that technology is permanent and that the interconnectivity of people’s communication, ideas, and collaboration will continue to cycle through social media and electronic applications, then a huge problem presents itself to the North American Division.

Rogers splits his bell curve into five groupings: Technology Innovators, who like technology just because it’s tech; Early Adopters (Visionaries), who are enamored with what technology could be; Early Majority (Pragmatists), who need the technology to be stable, reliable, and supported before embracing it; Late Majority (Conservatives), who prefer traditional methods and only dabble with technology; and Laggards (Skeptics), who may never embrace it at all.

Adaptations of the model vary, but Geoffrey Moore’s book *Crossing the Chasm* adds a gap between the first two groups and the last three and focuses on the life cycle of technology adoption.

The *Chasm* is the period between the time when an idea crosses the confusion threshold and the time when the number of variations drops to the point that people care to grasp what it means or can filter through the options. The *Green Line* follows the technology
cycle. An idea appears, and boundaries of the definition of that idea aren’t known. Many interpretations of that idea appear, time passes, the idea is explored, and fewer variations are left. From that point, the number of things that define a concept is reduced. This can happen over a number of years or in a relatively short span (with technology).

Examples include:

(a.) A lack of options and marketplace interest ushered in the development of consumer-level analog recording devices, many of which are now forgotten (green line ascends and then levels off). Consumers eventually narrowed down their choices to Betamax and VHS (line descends). Betamax had higher quality but shorter recordings, while VHS quality wasn’t as high but offered double the recording time. Eventually VHS prevailed as the standard (line levels). The Early Majority began adopting it, but much later in the game.

(b.) A similar thing happened with high-definition players. Variations became available (green line ascends and then levels off) but eventually came down to Blu-ray and HD-DVD (line descends). The technology was almost identical, but larger offerings from film studios released for Blu-ray made this the clear winner for consumers (line levels).

You can gather from the graph and the examples that the **Yellow Line** represents the point where the number of variations to an idea becomes too great to communicate an idea to an uninitiated audience. In other words, everyone to the right of the chasm becomes overwhelmed and waits for a clearer choice or winner.

The **Blue Line** represents social and electronic media applications. This is a problem for us because the number of applications and variations of social media and electronic applications is only increasing. There is no foreseeable plateau and then dip, so the Early Majority, Late Majority, and Laggards of this generation may never adopt the technology.

Let’s return to the demographic and psychological profiles that the North Central Rural Sociology Committee created for its Study of Diffusion of Farm Practices.

The report summarized the categories as:

- **Innovators**: had larger farms, were more educated, more prosperous, and more risk oriented
- **Early Adopters**: younger, more educated, tended to be community leaders, and less prosperous
- **Early Majority**: more conservative but open to new ideas, active in community and influential with neighbors
• Late Majority: older, less educated, fairly conservative, resistant to new ideas, and less socially active
• Laggards: very conservative, had small farms and capital, oldest, least educated, and less risk oriented

Do you see a correlation? Christians are a more conservative group than the average citizen. Seventh-day Adventists are more conservative than the average Christian. As a conservative body, many that ascend to leadership positions tend to share characteristics with those to the right of the chasm and are less willing to accept new ideas. And while waiting for a clear winner in the VHS/Beta war hurts no one but the consumer, waiting for standards in social media and other electronic applications to work themselves out could put us too far behind ever to recover.

Our Church has done an outstanding job of utilizing traditional marketing tools, but this is reflected again in the top-down communication approach. It’s time that we furthered our efforts and directed greater resources within higher engagement areas we’ll discuss later in this document.
INITIATIVES THAT MATTER:

Volunteerism:

Many organizations outside our Church have brought philanthropy (annual fund programs, major gifts, capital campaigns) and volunteerism under a single department. Volunteerism is but one strategy of connecting with the community and is leaned on heavily, especially by underfunded and understaffed charities. The Seventh-day Adventist Church believes that volunteerism is a central part of our mission and worthy of its own departmental directive. Volunteerism and philanthropy strive to foster change and improve circumstances but do so in very different ways. Both have a place in the same conversation. A shared central hub would serve both interest groups, as there is an enormous amount of crossover and relevance to philanthropy when looking at volunteers.

Think about this: Utah had the highest volunteerism rate of any state in the United States. An impressive 33% of Salt Lake City residents volunteered last year, ranking them fifth out of the defined 381 metropolitan statistical areas (MSAs) for the United States. Provo, Utah, had the highest percentage of its population—over 60%—volunteer out of all cities with populations between 500,000 and 1 million people. Provo is also home to the LDS Church’s largest Missionary Training Center.

The LDS Church has created a strong culture of volunteerism within the states and cities where it has large population bases or a strong presence. The average Mormon commits nine times as many hours per month (nearly thirty-six hours) to volunteer activities as other Americans do. The LDS Church’s strength in active volunteerism is successful because it is a central Church tenant. The Church also recognizes that the primary barrier to volunteerism is
not time, language gaps, childcare responsibilities, financial obligations, lack of transportation, misconceptions about volunteering, fear, or apprehension. The greatest factor is accessibility, so they’ve established a well-organized system that provides abundant volunteering opportunities within an easily accessible framework.

Volunteerism isn’t just service for the community; it represents real cash value. In 1995, the Church’s human resources department estimated that the 96,484 volunteers serving at the time contributed services having an annual value of $360 million. This data did not include those serving as full-time LDS missionaries.

Volunteering has trended upwards for all teenagers in North America (16–19) over the past six years and for Gen-Xers (1965–1981) for the last eleven years. Older adults (over 65) volunteer at a rate of over 80%. An average of 26.5% of Americans sixteen and older volunteered in 2012. Volunteers are almost twice as likely to donate to a charity as non-volunteers. When volunteerism percentages are higher in cities, so are other important factors. We see evidence of this when looking at the fifty-one largest MSAs, and it is almost uniformly true as you go from the top to the bottom.

Note three cities that cover the spectrum:

<table>
<thead>
<tr>
<th>City (rank)</th>
<th>% of Population that Volunteers</th>
<th>% of Residents that Give to Charity</th>
<th>Volunteer hours per Resident</th>
</tr>
</thead>
<tbody>
<tr>
<td>Salt Lake City, UT (5th)</td>
<td>33%</td>
<td>70.1%</td>
<td>48.9</td>
</tr>
<tr>
<td>Chicago, IL (33rd)</td>
<td>25%</td>
<td>57.3%</td>
<td>28.6</td>
</tr>
<tr>
<td>Miami, FL (51st)</td>
<td>15%</td>
<td>36.4%</td>
<td>23.2</td>
</tr>
</tbody>
</table>

It is hard to say if volunteerism increases giving, or if giving increases volunteerism. In this chicken-or-egg conundrum, the only thing that we do know is that they seem to go hand in hand. Communities of people feed off of the giving and volunteerism that occur around them, and are transformed. Communities of believers who share a central focus on giving and volunteerism stand to benefit even more than the general population when opportunities are available and accessible.
The Seventh-day Adventist Church needs an additional vehicle by which members can collaborate, give, volunteer, and explore. We are not so different from our Mormon brethren. A central repository that allows donors and volunteers to shift focus easily and alternate between the voluntary and fundraising functions of a new website in the fewest number of steps is critical to keeping people engaged and remaining within the portal/database for a longer period of time. Volunteers tend to give, and givers tend to volunteer. By offering a central location for believers to explore both areas, we increase the activity of both groups (and often the same people). We are also providing a service for our members to connect with each other and deeply experience how they can partner with others, including the Church.

To be continued……..