

# YOUR FUTURE IN FUNDRAISING



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Fundraising as a Career

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## Introduction

Albert Schweitzer, the famous physician who went to work in Africa in the early 20th century and experienced many challenges, once said, *“One thing I know: The only ones among you who will be really happy are those who will have sought and found how to serve.”*

This is just one of the many reasons why people, including young people as well as career-changers, choose to enter the fundraising field. Here are some additional reasons cited by those who have established themselves as professionals at a young age—and verified by those who have been around for quite a while! Fundraising doesn’t take place in a vacuum. It is an essential function in the entire scope of the nonprofit sector which is supported by philanthropy. And philanthropy is a highly significant part of the fabric of American society, providing opportunities for fulfillment, meeting needs,

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addressing crises and disasters, and building sustainability for the future. A fundraising professional is the manager of a process that brings together a sense of caring with needs that must be met. Fundraising is a critical element in the preservation of values. These values, inherent in our civic spirit, are fostered by philanthropic action—giving and volunteering. Fundraising is not a technical exercise. It takes place within the larger framework of an organization and its mission, and therefore is crucial for civil society and

the development or perpetuation of democratic values. Fundraising, therefore, is for the thoughtful professional, and not a mere fulfillment of a “to do” list.

It is the organizations of the nonprofit sector that touch the lives of ordinary and extraordinary citizens alike in ways that other sectors aren’t obligated to affect or simply cannot. Nonprofit organizations aren’t in the business of making a profit; therefore they are often designated as not-for-profit. While successful nonprofit organizations need to be profitable in order to survive, this is not their primary purpose. They provide for the interests and needs of all Americans—educational, social, artistic, cultural, physical, environmental, and professional. Hospitals, schools and universities, museums, human service agencies, and others provide services and benefits for all citizens. It is a “sector of



opportunity,” as described by Dennis Young.<sup>1</sup> It is a sector of organizations entrusted by donors and constituents to meet public needs and address causes.

Most people enter the fundraising field because it is an environment that serves human needs—needs that are not served by business and government. People want to heal, to educate, to preserve cultures, to shelter the abused, or to inspire. Other objectives can certainly be worthwhile, such as career advancement, involvement in a specific field of interest, working in a field that has such significant impact on nonprofit causes, but belief in the causes that a fundraising professional serves is of primary importance. Fundraising should touch souls, the professional’s as well as those who are served. A unique factor of fundraising as a career is that at the end of each day, the professional has engaged in a journey worth sharing because, whether or not the results of that day’s efforts are visible now or are long-term, the professional can take pride in the nature of the work. Fundraising or development or advancement, as some prefer to call it, is a fundamental part of the process that makes institutions successful. The genuinely committed professional feels a “calling” to the work of fundraising. The satisfaction is derived not from recognition, but from results, often intangible as well as those that aren’t visible for some time in the future.

In short, perhaps Pablo Casals, the renowned cellist, said it best. “The capacity to care is the thing which gives life its deepest meaning and significance.”<sup>2</sup> This sums up the reasons why fundraising is, and can be, an exciting and fulfilling career – it is focused on caring, and in doing so with excellence.

It is in this vein that this document is compiled and written. The Seventh-day Adventist Church needs more committed individuals to consider a career in fundraising, whether beginning a career or looking to change careers. Philanthropic Service for Institutions (PSI) is positioned to enable the search for a career in fundraising and to aid the individual in attaining the level of competence and achievement necessary in order to serve an organization and a cause. In this small volume you will find the following information. You can either read all the sections from beginning to end, or select those which fill the gaps in your knowledge, or use this as a reference and beginning point to seeking more information. Please contact PSI to learn more and be assisted in making this your life’s calling. (contact info)

In the section *An Overview of an Ongoing Fundraising Program or Department* you can become acquainted with the structure and process of a comprehensive fundraising program. A responsible and successful fundraising department will include all these or will address these areas in some way or other. If fundraising is part of an organizational function, internal collaboration will be vital; e.g., the marketing or public relations department can provide a great deal of support and input, as can the

1 Cohen, Lilly and Dennis R. Young. *Careers for Dreamers and Doers: A Guide to Management Careers in the Nonprofit Sector*. New York: The Foundation Center, 1989, p. 3.

2 As quoted in *Accent on Philanthropy II*, May, 1983, p. 16.

finance department in planning and ensuring transparency and accountability. If fundraising is part of a church building campaign or other project, the actions represented by these components of a fundraising program are still vital and need to be included.

If you are considering engaging in fundraising in one way or another, particularly as a professional, the section on *Skills and Qualities of the Aspiring Professional and Fundraising Positions to Match* will answer the question on “Who is the best fundraiser? Who will be most successful in doing fundraising?” In addition, this section provides an overview of the wide range of professional activities and jobs available, making it possible for a person to match skills and interests to the right position in serving organizations, from churches to universities and all nonprofits in between.

*Embarking on a Fundraising Career* is the section which helps you learn how to begin your career, or how to become proficient in fundraising if it is a temporary or part-time activity for you (of course, we encourage people to undertake fundraising as a career, but also recognize that fundraising sometimes needs attention but budgetary restraints preclude hiring a full-time professional). The positive aspect of fundraising as a career or focused activity is that many previous careers and professional activities lend themselves to entering a career in fundraising, or in changing from one career to another. For example, a background in higher education teaching and/or public relations provides an excellent platform to entering fundraising as a profession. Unlike many others, where there is a defined process and progression (such as in the medical profession), fundraising is a fluid career, making it highly desirable for people who want an exciting professional life and ways to make a difference in the lives of others and of organizations.

*Fundraising Professional Development Pipeline* outlines ways in which professional development can take place. While fundraising is based on solid, time-tested and research-based principles, it is also a dynamic profession and the fundraiser must keep up with what occurs in the field, in the organization, and in the world beyond the organizational walls. Keeping up, engaging in professional development and continuing education, and ensuring your proficiency. The question often arises—are we professionals or technicians? Regrettably, due to some prejudices and negative perceptions, fundraisers are at times denigrated and viewed with suspicion if not hostility. Fundraising is definitely a profession, with a code of ethics, a body of research, a set of best practices and much else that defines it as a credible activity to be respected. *Are We There Yet? Tracking the Path of Professionalism in Fundraising* addresses the fact that we should combine professionalism and the technical aspects of the profession—that we should be professionals who know the techniques.

Leadership is a critical factor in fundraising success, yet most fundraisers are not in the top position of the organization which they serve. However, that does not mean that fundraisers should not exercise leadership traits and learn skillful practices in leading others. Fortunately today’s concepts of leadership

include ideas such as “leading up.” *Leading from any Level—the Fundraisers Challenge and Opportunity* is a short thought piece that defines the best practices of leadership and suggests how fundraisers at any level in the organization can utilize these skills for the benefit of the organization and fundraising success. It’s critical for the fundraising professional to understand the context in which he or she is operating. Fundraising is an age-old practice, mentioned in the Bible and in records of the Greek and Roman times. The United States was in a leading position to formalize the practice, outline a process, develop strategies over time, and ultimately share these internationally. *Tracing the Development of Fundraising in the U.S.* provides a short introduction to how fundraising developed professionally in the United States

All of us who do fundraising, whether as full-time professionals or as part of a team trying to undertake a campaign or project, want to be successful, both for the sake of the cause and for ourselves. Sometimes, however, a job doesn’t turn out so well. We get embroiled in unexpected circumstances, problems assail us, the organizational team won’t work with us, and we despair about our jobs and say, “WHY ME?!” The section titled *Avoiding the No-Win Job* points out some of the warning signs that you should look for when being offered a job, or when applying for certain positions. While this doesn’t cover all possible pitfalls, this section will at least help you be realistic and careful when considering a job in fundraising. And even if you’re not considering a full-time position, these warning signs can also be related to fundraising success or failure in any fundraising effort.

We’re not alone out there. As stated earlier, fundraising has been practiced since time immemorial but as a professional, organized, formalized practice, it took hold in the early part of the 20th century. In the latter part of the century, congruent with some global developments such as the break-up of the Soviet Union, fundraising quickly became an international practice. *The Globalization of Fundraising* is a short introduction to how fundraising is practiced almost everywhere in the world. We are part of a global system. Principles and practices can be adapted to many organizations and many parts of the world. Differences in cultural traditions of philanthropy abound, but we are bound together by a common vision of wanting to support and help good causes, and this takes money.

*Additional Resources* include a website managed by a senior professional, Dr. Robert Fogal, who is a specialist in the Myers-Briggs type indicator, and via this site a person can determine what qualities and qualifications may be suitable for what positions in fundraising. Other resources are provided via the PSI website or by our personnel. Be sure to contact us at (insert PSI contact information). We will be happy to send you information, provide referrals, and talk to you in person.

Please contact PSI to learn more and for assistance in making this your life’s calling.

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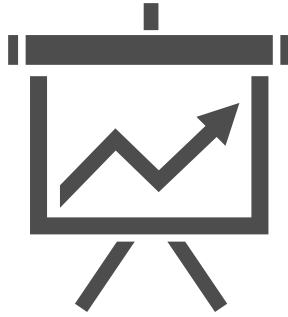
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## An Overview of an Ongoing Fundraising Program or Department

If sound fundraising principles are followed and practice is based on successful experience, much can be accomplished for nonprofit organizations. Possibly the prevalent reason why fundraising isn't something that everyone yearns to do is because most people don't realize that it is a discipline, an organized practice, a logical process—one that takes time and careful thought to implement. Successful fundraising is based on years of accumulated experience by seasoned professionals. While it isn't necessarily an easy endeavor, it's a worthwhile practice because of the valuable results for nonprofit organizations and the publics they serve.

Well meaning individuals perceive a need and immediately seek to remedy it by seeking funds. This kind of practice frequently results in failure or a disagreeable experience. Those who engage in social activism forget or don't realize that certain steps must be taken in order for resource development to be effective and productive. Following is a brief description of steps involved in a successful fundraising program.

1. **Know basic marketing principles.** A professional begins the fundraising process by realizing that it is a reciprocal relationship. Fees and other income rarely meet the budgetary demands of nonprofit services. Consequently a nonprofit organization (NPO) cultivates and solicits its clients and friends, many of whom become donors. An NPO must remember that a donor has a right to expect something in return for a gift. As donors provide funds for programs and operating needs, they expect gratitude and recognition, as well as some intangible rewards such as a sense of belonging and making a difference. If the exchange relationship is hurried and is incomplete, there is the possibility that the organization will vanish along with its donors and prospects.
2. **Consider the environment and climate for fundraising.** An organization's environment has an impact on the feasibility of fundraising. If government regulations, current economic

factors, changing demographics and other factors aren't considered, an NPO may find it difficult to meet its fundraising goals. It is essential to appraise the effects of environmental circumstances and what bearing they have on an NPO when planning for a fundraising campaign. Internal circumstances also dictate success or failure, such as an organization's readiness to raise funds. Are appropriate personnel in place? Is there an accounting and recording system? Has strategic planning been done? These and other questions must be answered before donors are approached.

3. **Create and examine case.** Making a case means sharing the mission, goals and objectives and programs. A case should be created and then re examined regularly to ensure that it still presents the organization to its constituent groups in the best way possible. Case expressions must be appropriate for the markets with which the NPO seeks a relationship. A case includes the reasons someone should give money to an organization. It includes describing programs and evaluation procedures, and providing financial reports. It means there is an effective governing body committed to the mission of the organization. It means staff are credible and competent. A case includes a statement of needs. Have needs been tested to make sure there is congruency between providers' perceptions of what must be accomplished and recipients' actual needs? What kind of financial support is required to carry out the programs and plans of an NPO?
4. **Involve board and other volunteers.** Board members are legally responsible for an NPO, and charged with securing and managing financial support. Therefore boards of NPOs should be involved from the inception of planning for programs and fundraising. Board members, as well as other volunteers, are the most effective persons to ask for funds because they represent selfless commitment to a cause. Are volunteers trained to serve in appropriate roles, and have they internalized both the preparatory information and the roles?
5. **Determine markets.** Potential funders include foundations, corporations, associations, government, churches and, most importantly, individuals. What are the possibilities for acquiring funds from each market? Which are the best ones for the organization to develop? Have all feasible funding sources been considered?
6. **Select programs and strategies.** How will the prospects be solicited, and for what programs? Programs for resource development include capital, annual fund, special projects, endowment campaigns, and major gifts. Each of these should be evaluated as to its purpose, and the appropriate one(s) selected. Strategies for approaching donors include mail, telephone, special events, and face to face solicitation. The more personal the approach, the more effective the solicitation.
7. **Research prospects.** An NPO's constituent groups should be determined, as well as their interest and proximity to the organization. From these groups prospects are then selected. Minimal research is required for those prospects who will make up the donor base; these include first time givers and repeat donors whose gifts are small. Individuals who will be asked for larger gifts will be

more fully researched in order that they might be cultivated and solicited appropriately. Prospects' giving ability should be taken into consideration when setting goals for each fundraising vehicle selected by the NPO.

8. **Create, use and communicate a plan.** Planning is a means to determine what must be done, how it will be accomplished, and who will do it. By now prospects and donors have been selected and matched with strategies for solicitation. The fundraising vehicle has been chosen, the case has been prepared (along with materials that will express the case), board members and other volunteers have been involved in all steps, and the organization's readiness to raise funds has been determined. Now it's time to create a plan that includes details on all fundraising program elements, and one that provides evidence of good stewardship on the part of the NPO. A plan should be a workable and dynamic part of a fundraising program. Monetary goals that have been determined to be feasible, based on factors listed above, should be included in the plan, as well as appreciation and recognition strategies. Constituent groups, which include prospects and donors, must be told about the organization and its needs as well as achievements and opportunities. Communication lays the groundwork for successful solicitation, and can take many forms. Communication also includes feedback from constituents, which provides a basis for wise decision making.
9. **Solicit the gift.** After all this preparation, the time has finally come to ask for the donation. Thorough preparation, which may vary in intensity, time and detail, ensures the likelihood of success. It also increases the pleasurable aspects of fundraising which, while not easy, yields great satisfaction. Appropriate and timely recognition paves the way for the next step.
10. **Renew the gift.** The best prospect for a charitable gift is the person who has already given. The opportunity to give and give again should be provided to all who are prospects and can be attracted to support an organization's cause.

As can be seen, fundraising is a highly integrated management process and takes time to implement. Time elements may vary, depending on the state of organizational readiness. Each step in a successful fundraising program may not require the same emphasis for each organization, but no steps can be missed without diminishing the likelihood of favorable results. However, rushing into a fundraising effort without adequate preparation often causes disappointment and lack of results. At times organizations feel that they can skip steps or can "just do it," but this is not advisable.

It is a privilege to raise funds for worthy causes. Those who are willing to be engaged in such activity and do it with some level of success deserve a special honor because they have helped bring about needed and valuable results.

## **Highlights of this chapter:**

- 1) Fundraising isn't just "ten easy steps." or a list of things to accomplish
- 2) Fundraising is an organized, thoughtful process that involves a team, led by a fundraising manager or professional.
- 3) Establishing a fundraising program or department involves ten serious and practical functions. These must be in place in varying degrees, depending on the type of organization and its fundraising goals.
- 4) In order to have greatest success fundraising must be integral to an organization – part of its context – and not sidelined.



## Skills and Qualities of the Aspiring Professional and Fundraising Positions to Match

According to Peter F. Drucker, the renowned expert in management theory, a radical transformation of work and society is taking place. This is the age of social transformation, he states. The dominant, emerging group of employees are the “knowledge workers,” who will make up a third or more of the work force in the United States. Knowledge workers require much education, the ability to acquire and apply theoretical knowledge, and must develop the habit of continuous learning.<sup>1</sup> Drucker foresaw this change in America’s workforce when he wrote several decades ago that “(k)nowledge workers do not produce a ‘thing.’ They produce ideas, information, concepts. The knowledge worker, moreover, is usually a specialist.”<sup>2</sup> Certainly this concept is true of a fundraising professional, who is a specialist in the nonprofit sector and a guardian of the philanthropic tradition in the United States.

Sometimes the question is asked, “Why do the professionals work in a field that has so little public acceptance?” The response is, fundraising is the business of helping others, and that satisfaction comes from seeing ideas and plans come to life, of being part of an institution that carries out programs to benefit a community.<sup>3</sup> Another writer offers this opinion as to why people want to work in fundraising. “Besides the satisfaction of advancing a mission they believe in, fundraisers say they like working in an environment in which goals are clear, performance is quantifiable and advancement is based on results.”<sup>4</sup> A person can combine ambition, ability, and skills with personal satisfaction.

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1 Drucker, Peter F., “The Age of Social Transformation,” *The Atlantic Monthly*, Vol. 274, No. 5, November 1994.

2 Drucker, Peter F. *The Effective Executive*. New York: Harper & Row, Publishers, Inc., 1967

3 Greenfield, James M. *Evaluating and Managing the Fundraising Process*. New York: John Wiley and Sons, Inc., 1991, pp. 192-193.

4 Tift, Susan E. “Asking for a Fortune,” *Working Woman*, November 1992, p. 68.



In view of the above, it can be seen that the demands made on a fundraising professional are many. They include requirements such as education, job skills and experience as well as personal characteristics.

What skills and qualifications are needed to be a successful professional in the field of fundraising?

Skills often sought by those hiring fundraisers are:

- Verbal and written fluency and competence.
- Attention to detail.
- Ability to conceptualize.
- Negotiating skills.
- Ability to coordinate and manage.
- Innovation, the ability to see something new, different, and better.
- Analytical skills.
- Technical expertise (which varies according to position).
- Ability to mentor, supervise and teach
- Understand budgeting.
- Ability to plan.
- Volunteer management.

Personal characteristics are also significant to consider. Those that have been identified as pointing to a successful professional are:

- Commitment to service.
- Enthusiasm.
- Idealism.
- Comfortable in dealing with people.
- Sensitivity.
- Tolerance for ambiguity.
- Flexibility.
- Honesty and integrity.
- Perseverance.
- Compassion.
- Confidence.
- Energy.
- Wisdom.
- And a little humor sometimes helps.

These lists could probably be expanded. Each skill and quality plays a role in the range of fundraising functions. In other words, a person's abilities and personal characteristics come together in the specific fundraising role he or she chooses. The general areas of concentration include the following:

**Direct mail or direct marketing—producing and distributing written materials to a targeted audience.** Some particular skills and qualifications needed are writing, ability to work with a deadline, seeking advice from other professionals, creativity and technical expertise. A professional must have the ability to handle lists, sometimes of great quantity, write copy, handle all the details of a mailing, and produce reports on the results.

**Special events—organizing functions or benefits that meet several goals, from creating and cultivating good will to raising funds.** Skills and qualifications needed include organizational ability, management of many details, creativity in selecting a type of event, and working well with volunteers. Certainly a great deal of patience and flexibility are required in this area.

**Prospect research—finding appropriate information about prospects and donors, and managing this information.** This sub-specialty has taken on new dimensions with the growth of technology. The person undertaking research must have technical ability in researching through internet and maintaining records on computer software. Other skills include the ability to research from many sources, compile information, record and manipulate data, and support staff, volunteers, and administrators with appropriate information.

**Major donor solicitation—working with people who have the capacity to make large gifts to the organizations.** A person specializing in this area must be able to identify and qualify major gift prospects, plan a strategy for cultivation and solicitation, often ask for the gift, provide appropriate follow-up, and ensure proper stewardship of the gift. Major gift officers are often expert communicators and have good human relations skills. They are senior staff and work closely with administration or management of an organization.

**Corporate and foundation solicitation—seeking funds from these markets involves proposal writing skills, as well as research and team management.** Seeking prospects among these two potential funding sources requires the ability to research, produce written material, edit copy, bring together persons with different knowledge and expertise, communicate with prospects, provide follow-up information, develop appropriate recognition procedures, and be accountable for use of grant funds.

**Planned giving—the fastest growing area of expertise that requires much technical knowledge balanced with people skills.** Planned giving is a demanding but growing sub-specialty that involves learning about the various instruments for giving, tax structures and implications, and benefits to the donor and the beneficiaries. Planned giving professionals often are senior level employees and work with volunteers and the president or executive director.

**Data and records management—keeping track of information and helping others manage the information.** Most organizations maintain computer as well as hard-copy records. A professional must know how to enter the information into the data base correctly so that it is useful and can be retrieved for specific purposes. Gift receipting and acknowledgment is often a part of this role. An eye for details and patience in following through are critical for this function.

**Consulting—working independently in advising nonprofit organizations.** Consultants may specialize or be generalists. They may work independently or with a firm. They will need a broad base of fundraising knowledge and have the ability to give advice.

The titles of organizational positions vary and often reflect the function. First, the general descriptive terms need to be identified. Fundraising (opinions vary on how this term should be written; some prefer fund-raising or fundraising) is sometimes referred to as advancement (mostly in higher education) or development. Some believe these are euphemisms which grow out of a reluctance to be direct about the fundraising profession. The most common job titles that evolve from these terms and the functions described above are:

Vice president for institutional advancement (or just advancement).

Vice president for development.

Vice president for philanthropy.

Resource development officer.

Director of development.

Major gifts officer.

Annual fund director.

Annual giving director.

Fundraising manager.

Planned giving officer or director.

Grants manager.

Corporate and foundation relations specialist or director.

Fundraising coordinator.

Researcher.

Prospect researcher.

Research assistant.  
Database manager.  
Records manager.  
Administrative assistant.  
Development manager.

These may take on different forms, depending on where a person works. For example, an educational institution or health care organization may have an associate or assistant vice president for advancement or for a sub-category such as major gifts. Some organizations create foundations which focus on fundraising for the institution; their leadership may assume the title of president or director. Another possible title is executive vice president if the organization is complex.

There are several types of organizations which could employ a fundraising professional. What is important here is to see the range of possibilities where a person's skills and abilities might best fit. The generally accepted breakdown includes the following.

Religion.  
Education.  
Health.  
Human services.  
Youth.  
Arts and culture.  
Environment and conservation.  
Long-term health care.  
Consultants.  
Political and advocacy groups.  
Associations.  
Public benefit.

In putting all the above together, from determining a desirable role to finding a suitable organization for a person's talent, the steps for seeking a career in fundraising could be illustrated like this:

Develop and accept a mission of service and commitment to fundraising as a profession.

1. Understand what fundraising is, how it fits into the nonprofit sector and its relationship to philanthropy.
2. Seek knowledge of fundraising and the sector by acquiring education and/or training.
3. Become an overall professional while specializing in a sub-specialty.

4. Acquire the first job at an appropriate level of responsibility. This may be in data management, as an assistant director, or proposal writer.
5. Continue professional development and seek career advancement by accepting jobs that are progressively more demanding and challenging. Compensation is a factor in this.
6. Develop good leadership skills while continuing to polish and perfect skills and acquire additional knowledge.
7. Positions at this stage may be director of development, major gifts officer, or planned giving specialist.

The person looking at fundraising as a career may wonder what he or she will be part of in terms of type of people, gender, age, race and other general characteristics.<sup>5</sup> Other areas of interest that a career-seeker may want to know about are the details of what it's like working in fundraising.

What is the typical work-week like? How often do professionals change jobs and why? What is the demand for fundraisers?

First, fundraising professionals work hard. While many experience 60 and 70 hour work weeks, the average is between 45 to 50 hours a week. Naturally, this will differ among types of work. It is conceivable that a person handling records, prospect research, or mailings could limit a week's work to the normal forty hours, a person involved in major gifts, planned giving, capital campaigns or administration could work far longer due to the differing demands of the position.

Second, the average length of stay in a position has increased. About twenty years ago the average was said to be about 18 months to two years at one particular job, but the average stay has increased in recent years. Again, the type of position might dictate this. For example, those working in entry-level positions may have to move to a different organization or even geographic location to receive a promotion, while senior fundraising professionals may be content to stay for a significant length of time, or even retire from a position. Naturally, there are some situations that are untenable or unmanageable, such as in dysfunctional organizations, and these may cause a person to leave a position.<sup>6</sup>

Third, the demand for fundraisers is high, particularly in the Seventh-day Adventist Church and its organizations.

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5 The Association of Fundraising Professionals has such information and this can be acquired through PSI.

6 Wagner, Lilya and Mark Hager, "Board Members Beware! Warning Signs of a Dysfunctional Organization," Nonprofit World, March 1998.



Fourth, the job satisfaction is generally high among fundraising professionals. A 26-year-old Harvard University graduate who co-founded Peace Games believes that jobs in nonprofits can be as rewarding as those in the high-tech world. He is quoted as saying, “What I can offer folks is something they can’t get at Microsoft: the ability to help kids be peacemakers.”<sup>7</sup> This is true for many people who have changed from the corporate sector to the nonprofit field. The satisfaction of working with human needs, interesting and worthwhile causes, and achieving results that go beyond the bottom line of financial gain has attracted excellent professionals who have made the switch.

In progressing up the ladder of professionalism, both in practice and positions held, the fundraising professional will find a constantly changing set of challenges. In pooling the opinions of current experts, the following might be acknowledged as being significant in this century.

- Increased scrutiny of the sector, judgments on how money is used and why it is needed.
- More demand for accountability or “transparency” by increasingly sophisticated donors who wish to know what their investment is accomplishing.
- Technological advances that both enhance fundraising capability and challenge the small shop in particular.
- Globalization—a world view of civil society and an understanding of the role of fundraising in developing and maintaining civil society. This presents new possibilities for fundraising practice, but also makes it necessary to adapt principles to new cultures and contexts.
- More competition for philanthropic dollars due to steady growth of nonprofit organizations.
- New opportunities but challenges as well because donors’ ways of giving are changing.
- There is more demand for results, more involvement by donors, and donors seek out causes that interest them rather than wait for organizations to come to them.
- Increasing economic inequality and therefore greater necessity for action by nonprofit organizations.
- Demographic changes that have an impact on who can give and who needs nonprofit services
- Blurring of sectors and the continuing challenge to educate the public about the sector and how it affects our communities and lives.
- The move from outputs to outcomes, increasing emphasis on results.

Some people may find these daunting, others relish the opportunity of expending their talents and energies and welcome the rigorous work involved. Whatever the attitude of the career seeker, these challenges are real but also change over time, taking on new characteristics as old issues are resolved and new ones surface.

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7 Billiteri, “Keeping the Best on Board.”

The fundraising professional plays a significant role in the operation of healthy, viable nonprofits which can face the challenges of this decade. It requires the use of skills, abilities and personal traits that match various roles and responsibilities of the fundraising professional. Above all, the professional will engage in fundraising practice in an ethical, principled way because the fundraiser is the steward of a donor's trust and funds.

### **Highlights of this chapter:**

- 1) Unlike some other professions which require a steady path through education and training, fundraising is a profession that can be entered through various means, ranging from acquiring a degree to using existing experience and skills to make a career change.
- 2) Certain qualities, skills and experience work best in entering the field, whatever the path.
- 3) One of the appealing features of fundraising as a career or practice is that there are many components to the profession which allow a person to select a responsibility that is most suited for his or her talents, experience, and existing skills.
- 4) Some ways in which a person can enter the field are listed and how to plan for advancement in the profession.
- 5) A description of what fundraising work is like concludes the chapter.



## Embarking on a Fundraising Career

For young men and women getting started on a career, the option of becoming a fundraiser is one that is becoming more and more popular. Most organizations of the nonprofit sector, from small social service organizations to huge universities, employ fundraisers. The positions also range widely, from prospect research to major gift acquisition to leadership of a fundraising department or foundation. A fundraising professional can choose to work in a setting that is congruent with his or her values and interests.

Preparation for a career has also progressed greatly in the last fifteen to twenty years. Most seasoned fundraisers talk about “falling into fundraising,” or finding themselves in the career by accident. Today there are many credible, accepted ways of preparing for fundraising as a profession. These include:

- Academic programs
- Schools such as the Fund Raising School at Indiana University
- Centers and institutes, often housed at academic institutions
- Associations which offer their own professional development
- Continuing education programs
- Affinity groups which provide a collegiality along with professional development
- Consultants who often give workshops
- Fellowships and internships, a great entry point for a first job
- In-house training
- Mentoring and on-the-job training
- Self-study available through books and other media

Finding that important first job in fundraising can be a challenge for a young person. Most job ads state “three to five years experience,” but the perennial question nags at us – “How can I get experience if I can’t get a job?” The following suggestions may help the young professional.

A most important technique to use in developing job leads is using your personal contacts. It’s been said that you’re never more than six people (some optimists reduce that number to four) away from the individual you want to reach. Some job search specialists state that as many as 40% of all jobs are obtained through personal contacts. There is general agreement that networking – the word-of-mouth approach – is more effective than seeking a position through newspaper ads or by making “cold calls” yourself.

Join professional groups. Increase your contacts. Be genuinely friendly and interested in wanting to get acquainted with peers and colleagues in your field.

Find a mentor. Mentors may be senior professionals and often can be found through professional associations. Association of Fundraising Professionals (AFP) chapters frequently have formal mentoring programs. An inexperienced fundraiser can also seek out a mentor by making personal contacts. Most people are willing to assist colleagues, whether inexperienced or established professionals. Be sure you are specific about what you desire from the mentoring relationship, and don’t wear out your welcome!

Attend workshops, seminars, conventions and conferences. Determine to become acquainted with at least one person during the conference, and select this person carefully. College or university courses related to nonprofit management (which usually includes fundraising) will also bring a person in touch with established professionals. In addition, more university placement centers are providing information about nonprofit employment. Students seeking information and contacts are often allowed access to organizations and professionals to a greater degree than established professionals. Therefore students should be encouraged to do academic work in such a way that they draw on the community and professional resources. In a recent AFP survey, 14% of the U.S. respondents said they came to fundraising from being in school, which makes the numerous academic programs an excellent entry point into the career (see <http://tltc.shu.edu/npo> for information on this).

Volunteer. Volunteering may provide valuable training for a new fundraising professional, although sometimes the experience does not reflect reality as much as it should. However, volunteering does provide visibility and contacts, and an overall view of at least some portion of the nonprofit sector. It can be included on a resume as credible experience. Sometimes organizations are highly dependent on volunteers, and these individuals can gain actual job experience that serves as a basis for their resume.

Become an intern. Internships may be the best solution for acquiring “on the job” experience. Internships are available at many nonprofit organizations, some foundations, and some corporations. A number of students can state that their internships landed them jobs at the same organizations, such as foundations, or they were more marketable as a result of this experience.<sup>8</sup>

In progressing up the ladder of professionalism, both in practice and positions held, the fundraising professional will find a constantly changing set of challenges and opportunities.

Job satisfaction is generally high among fundraising professionals. The satisfaction of working with human needs, interesting and worthwhile causes, and achieving results that go beyond the bottom line of financial gain has attracted many young people and excellent professionals who have made the switch from other sectors.

### **Highlights of this chapter:**

- 1) How to launch a career in fundraising, ranging from educational opportunities to on-the-job training possibilities are explained.
- 2) Outlined are the many avenues by which novice or experienced professionals can undertake the path to professionalism

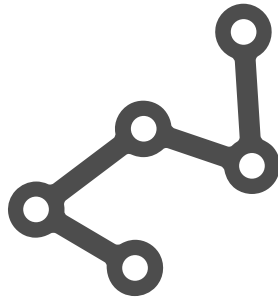
PLEASE NOTE: Further information on a career in fundraising, or fundraising as part of a professional’s responsibilities may be obtained from PSI. PSI can also provide referrals, mentoring availability, and personal counseling.

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<sup>8</sup> For further, complete information on all aspects of fundraising as a career (not just for young professionals), please see *Careers in Fundraising* by the author, published by Wiley.







## Fundraising Professional Development Pipeline

Suggested activities for professional development of a fundraiser, to be adapted according to innate talents, related skills and experience, and qualifications on which a career in fundraising can be based as well as what is necessary and required for the employing organization.

1. Defining Fundraising: *Fundraising is not just a set of techniques to be applied. It is a thoughtful process of asking people to invest in causes that enhance a civil society and provide solutions to human problems. It is based on a philosophy that goes deeper than just meeting financial goals. It involves the practice of good stewardship and accountability as donors entrust the organization with their funds.*
2. Roles of the Fundraiser
  - Communicator—oral and written fluency and competence, ability to conceptualize, attentive to detail
  - Negotiator—bring all parties to consensus
  - Manager—coordinate, manage, plan for fundraising, work with a team
  - Innovator—creative, ability to see something new, different, better
  - Planner—develop strategies, campaigns, events
  - Technician—expertise in technology that supports fundraising
  - Mentor and Teacher—advance the profession, teach all parties about philanthropic fundraising
  - Servant Leader
3. Putting Roles Into Action; Various Jobs and Skill Sets
  - Direct Mail
  - Special Events
  - Prospect Research

- Major Donor Solicitation
- Corporate and Foundation Approaches
- Data and Record Management
- Social Media
- Consulting

#### 4. Stages of Career Development

- Understand what fundraising is, how it fits into the nonprofit sector and its relationship to philanthropy. Get some education and training.
- Become an overall fundraising professional then find a niche in which to specialize
- Continue professional development and seek career advancement by accepting jobs that are progressively more demanding and challenging.
- Develop good leadership skills while continuing to polish and perfect skills and acquire additional knowledge.

#### 5. Progression of Career Development for the Novice Fundraiser

##### Year One:

- Attend the Principles and Techniques of Fundraising course offered by The Fund Raising School or equivalent training which can be suggested by PSI (e.g., local colleges and universities at times offer credible training which can be substituted)
- Attend the local or national Association of Fundraising Professionals conference or the Association of Healthcare Philanthropy conference.
- Read two general volumes on fundraising as suggested by supervisor or PSI, and one specialized volume in area in which the fundraiser is working.
- Work with a mentor, either assigned by supervisor or recommended by PSI.

##### Year Two:

- Attend a specialized course of The Fund Raising School or a workshop offered by AHP. PSI can assist in securing the appropriate course to attend.
- Attend the local or national Association of Fundraising Professionals conference or the Association of Healthcare Philanthropy conference.
- Participate in a webinar of specialized interest in the area in which employed, or if a generalist, one of future interest.

- Read a volume on philanthropy in the United States, a specialized interest volume, and a general fundraising volume.
- Maintain contact on periodic basis with mentor.

#### Year Three:

- Attend a professional seminar geared toward more advanced professionals such as those offered by AHP, local fundraising associations, or seminars offered in conjunction with the national AFP conference.
- Take courses necessary to acquire The Fund Raising School's certificate in fundraising management or a similar program.
- Expand reading to areas of special interest as required by current position.
- Begin to acquire experience to work toward the CFRE (see [www.cfre.org](http://www.cfre.org)).

#### Advanced Professional Development:

- Work on a graduate degree.
- Attend senior seminars.
- Focus on specializing in a fundraising area.
- Mentor junior staff members.
- Become involved in presenting information at seminars and conferences.
- After five years, acquire the CFRE.

#### 6. Skills and Qualifications Essential to Success in the Fundraising Profession

- Verbal and written fluency and competence.
- Attention to detail.
- Ability to conceptualize.
- Negotiating skills.
- Ability to coordinate and manage.
- Innovation, the capability of seeing something new, different, and better.
- Analytical skills.
- Technical expertise (which varies according to position).
- Mentoring, supervising and teaching ability.
- Understand budgeting.
- Ability to plan.

- Volunteer management.
- Vision

#### 7. Personal Characteristics That Lead to Success in the Fundraising Profession

- Commitment to public service.
- Enthusiasm and idealism.
- Comfortable in dealing with people.
- Sensitivity.
- Flexibility and tolerance for ambiguity.
- Honesty and integrity.
- Compassion.
- Confidence.
- Perseverance.
- Energy.
- Wisdom.
- Professional competence and skill.
- Courage to fail.
- And a little humor sometimes helps.

#### 8. Ethical and Moral Values Essential for Success

- Commitment beyond self.
- Obedience of the laws.
- Commitment beyond the law, i.e., obedience to the unenforceable.
- Commitment to the public good.
- Respect for the worth and dignity of individuals.
- Tolerance, diversity and social justice.
- Accountability to the public.
- Openness and honesty.
- Prudent application of resources.

## 9. Preparing for a Career

- Academic Programs
- Schools
- Centers and Institutes
- Associations
- Continuing Education
- Affinity Groups
- Consultants
- Fellowships and Internships
- In-house Training
- Mentoring and On-the-Job Training
- Self-Study

## 10. What to Study?

- management of nonprofit organizations
- accounting and financial management
- marketing
- volunteer and personnel management
- legal issues
- economics
- overview of the sector
- some history and philosophy of the sector
- research
- tax policies
- government and the nonprofit sector
- issues of the sector and its organizations

## 11. Steps to Finding a Job

- Develop a plan and set goals for a job search.
- Identify resources and gain an understanding of the possibilities.
- Build a network of people and organizations.

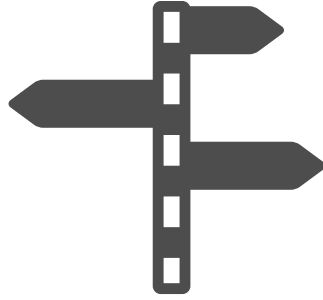
- Prepare a resume.
- Prepare for an interview and develop questions to ask.
- Develop a strategy and a plan.

## 12. Where to Find a Job . . .

- Job ads
- Volunteering
- Internships
- Network of acquaintances
- Professional associations
- The Internet
- Through mentors
- Attending workshops, conferences, seminars
- Search firms

## **Highlights of this chapter:**

- 1) This is a summary of the previous two chapters covering the gamut of fundraising as a profession or practice, ranging from how to get started to how to grow professionally.
- 2) The possibilities, functions, responsibilities, and work opportunities are presented.
- 3) The range of training and educational opportunities, with practical suggestions, round out this informative chapter.



## Are We There Yet?

### Tracking the Path of Professionalism in Fundraising

When an individual begins a career as a fundraiser it won't be long before they face the question, "Are fundraisers professionals or technicians?" This section originally appeared in a professional journal and was designed to help fundraisers reflect on that question and how their own behavior contributes to the body of thought on the topic. It is included here in its original form to help stimulate thought on the debate as well as guide the behavior of fundraisers, whether beginners, professionals, career changers, or persons adding fundraising to their existing work portfolios.

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 literature about and supporting the profession, and respect.

In the ensuing years fundraising has decidedly attained most of the attributes which 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 might occur, however, fleeting, "Are we there yet?"

In pondering this situation, a poem by the inimitable American poet Robert Frost 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 seems to also be 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 ten easy steps to success and write books like “guerilla tactics” or “fundraising for dummies?” In spite of 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?” Or a board chair who says, “Why are we doing your job for you?!” when the fundraiser organizes a campaign for the board’s involvement and action,

While the message of one recent text heralds the end of fundraising, a far greater number of activities in the field reveal a youthful vigor. Must we acknowledge that fundraising might still be in the figurative teen years, battling its way through awkward times? Are we still the technicians, by choice or circumstances, who try to achieve pre determined goals set without our voice or involvement, who practice a fill in the blanks type of fundraising in which we count the visits and follow those “ten easy steps?” Are we followers and not leaders, and do we obey the rules without thinking about them? Or are we professionals who can command respect? Are we proud of the research now available and being conducted in our field? Does this information shape our practice, or do we shy away from anything that seems too academic or cerebral?

Do we adhere to the body of knowledge and fundamentals that dictate best practices? Are we obedient to the unenforceable, meaning that we engage in ethical practice? We have many publications, associations with clout, oversight organizations or “watchdogs,” and philanthropy and fundraising are written or spoken about publicly with increasing frequency, such as books by ex-presidents or articles about donors and volunteers in popular publications. Do these influence us and our practice, or do we shrug off such indicators of professionalism as too academic and esoteric and focus on the technicalities of our jobs?

Questions like these might truly indicate that we are at a crossroad, with one path leading to a more technician-focused career, and the other assuming a more professional role. A look at some of the trends, changes and issues in fundraising as a career may help us determine just which road we seem to be embarked on.

Nonprofit careers are now in fashion and more workers are being drawn to the nonprofit industry. Although nonprofit sector organizations usually have fared well during economic downturns, employment did weaken significantly in previous years. Employees in nonprofit organizations are being asked to do more with less labor input. Consequently, while there is a need for fundraising at an ever-

increasing pace, there is also less budget, which means that more fundraising is done by nonfundraising staff because a significant share of nonprofits lack fulltime fundraisers.

Conversely, however, sometimes fundraiser jobs go begging because of changing trends in employment and prospective employee demands. Larger organizations are luring away good fundraisers from small ones, particularly those who want a better career track, higher salaries, more specialization, and more job security. In addition, more fundraisers are entering the consulting field. Changing demands by employers are also affecting the fundraising employment market. For example, there is more demand currently for fundraisers with communication and marketing skills. Or, at times persons with a business background are more valued than career fundraisers because they are thought to be more bottom-line and strategically oriented. This may be one cause for the trend of more reliance on executive search firms rather than organizations seeking their own candidates. An inherent problem, however, surfaces with this trend. Probably most senior fundraisers have been approached by a “headhunter” sometime in the last six months. How many of the persons conducting the search have ever done fundraising themselves or know much about the skills needed? Can we assume that some of these factors in fundraising as a career are nudging us to be technicians to a greater extent than thoughtful professionals?

What hasn’t changed is the conclusion that fundraising is complex and competitive, and vulnerable to economic shifts and other workplace pressures. The current extraordinary emphasis on major and planned gifts has led to a mindset that only considers goals and dollars raised versus many other aspects of fundraising activity—such as developing relationships which take time to mature, acknowledging that some organizations and causes are easier to raise money for than others, and that time factors enter into the equation, such as how long an organization has raised funds. These types of situations may well be the reason why young people, for whom educational, training and other types of career-entry opportunities have increased enormously, view fundraising as a career path but not career goal and that many competent and successful fundraisers turn to other careers or means of making a living because of burnout. Certainly there continues to be high turnover due to long hours and stress. Adding to the complexities and pressures is the ever-present gender salary gap, and while salaries in general have become quite respectable, there is also a widening range between the experienced and novices, and among types of nonprofits. No doubt all the above listed factors influence the predicted leadership deficit—three out of four nonprofit senior executives will leave their jobs in the next five years. This trend is causing both concern as well as providing much opportunity but the question remains – will technicians or professionals fill those slots?

There are, however, favorable changes and trends to counterbalance those that cause us concern. More than ever, people are planning fundraising careers instead of just dropping in on the scene, and more people see fundraising and other jobs in the nonprofit sector as viable options for career changes. There is more acceptance by employers that we can expand our skill sets while on a job, and mentors help us evaluate the possibilities for learning, training and professional advancement, whether we plan on fundraising as a career or whether we wish to make the jump from business or government positions. There are also more chances to learn about various careers and roles, and these can be matched to individual personalities and skills brought to the profession.

Without a doubt, as we evaluate the current status and future projections about fundraising as a career, we must acknowledge that today's fundraiser is required to have a broader set of skills and levels of professionalism than ever before, that unexpected turns must be handled with flexibility, that there is a blending of technology with old fashioned people skills, and that, whether unfairly or not, there is an increasing focus on the bottom line rather than the process, causing skewed views of who really is or can be a fine fundraising professional.

As Frost said,

Two roads diverged in a wood, and I  
I took the one less traveled by,  
And that has made all the difference.

It does appear that whether the circumstances are externally imposed by employers or self-imposed by us as fundraisers, whether we have allowed ourselves to be treated unprofessionally, or whether perhaps have not known how to handle the challenges that undercut our respect and effectiveness, we are struggling to maintain a balance between being technicians and professionals.

Frost's concluding lines are enigmatic. There is no indication whether the road less traveled was the right choice, or what difference that choice made. When it comes to fundraising as a career, our choices appear to be just as enigmatic. Perhaps ultimately the answer is to choose to be professionals who have mastered the techniques and who take their practices and expertise to a higher level and are respected for the value they bring to nonprofits, to communities, and to our society in general.

## **Highlights of this chapter:**

- 1) Presented are discussions on whether fundraising is a technician's job or a profession showing how attributes of a profession have been fulfilled in the field of fundraising.
- 2) In recent years some demands on fundraisers or practices in which fundraisers engage have raised this question once again.
- 3) Due to the great value fundraisers bring to the fulfillment of an organization's mission and functions, fundraisers have highly significant roles to perform. These should be recognized and fulfilled by both the fundraiser and the organization. A fundraiser is most successful when viewed as an integral part of the organization and its functions, receives the respect the position deserves, and is in the communication and decision-making flow.
- 4) Perhaps the best way to view a fundraiser is as a professional who knows the techniques.





## **Leading from any Level– the Fundraisers Challenge and Opportunity**

Managing from the middle is not new. Leading from the middle is, however, a relatively new idea, especially when it comes to fundraising professionals. Fundraisers must manage the fundraising program, but they must also recognize that they are uniquely positioned to provide leadership. In order to do that they must also free themselves from the idea that the only leadership power that works is positional power.

Fundraisers may see themselves in some of these statements:

1. We have more expertise than authority.
2. We don't have the final say; we do have important influence
3. We have access to people in many areas of our organization, but we deal with people who have more authority than we do.
4. Our roles are seen differently by different people and we have difficulty shaping those perceptions.
5. Our most important “clients” are people who often don't understand our function.
6. Users of our services often see us as less important, subordinate, ancillary that is tolerated but not fully valued.

Fundraisers share the challenge of working with people and processes that move the organization toward its primary mission. This is mostly done from the middle, not the top, of “corporate” pyramids. Fundraisers are support or service professionals. This role is important in determining the organization's strategic direction and essential for getting results, and it may be difficult, challenging, rewarding and growthful.

Ralph M. Stogdill, who died in 1978, was professor emeritus of Management Sciences and Psychology

at Ohio State. In 1981 Bernard M. Bass, Professor of Organizational Behavior at State University of New York, wrote *Bernard M. Stogdill's Handbook of Leadership*, a timeless volume whose wisdom has maintained relevance throughout the subsequent decades.<sup>9</sup>

According to Bass, Stogdill believed that effective leadership combines individual traits and competencies with the demands of the situation in a particular group or organization. Most successful leaders adhere to group norms and demonstrate their leadership by helping the group achieve its goals. Effective leadership is successful influencing by the leader that results in goal attainment by the influenced followers. Leaders are agents of change whose acts affect other people more than other people's acts affect them. There, according to Stogdill, leadership functions include:

- Defining objectives and maintaining goal direction.
- Providing means for goal attainment.
- Providing and maintaining group structure.
- Facilitating group action and interaction.
- Maintaining group cohesiveness and group member satisfaction.
- Facilitating group task performance.

Stogdill also believed that personality plays an important role in leadership. But a particular combination of traits doesn't make a leader. Personal characteristics must bear a relevant relationship to the characteristics, activities, and goals of followers. Personality factors associated with leaders include:

- capacity
- achievement
- responsibility
- participation
- status
- initiative
- persistence in pursuit of goals
- originality in problem solving
- self-confidence and sense of personal identity
- willingness to accept consequences

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9 Bass, Bernard M. *Stogdill's Handbook of Leadership*. New York: The Free Press, a Division of Macmillan Publishing Co., Inc., 3rd edition, 1990.

- readiness to absorb stress
- ability to influence others' behavior
- capacity to structure a social interaction system.
- self-confidence
- self-esteem

The development officer must be a leader. As leader, the fundraiser must strive to achieve both the desirable competencies as well as personal characteristics described by Stogdill. In addition, he/she helps crystallize goals and develops action plans to meet them. The fundraiser should be creative in designing development strategies, defining programs and projects and employing methods and techniques particularly suited to the organization. Appropriate leadership of staff and volunteers is critical. They must be motivated and inspired to action. Together the team, with the fundraiser leading from the middle, must be dedicated to purpose and to ongoing professional growth. The development officer provides the leadership and establishes the context for this to take place.

Fundraisers inspire commitment and action. They catalyze, convene, energize, facilitate others to create visions and solve problems. They create new alliances, partnerships, forums. They build broad-based involvement and include relevant constituents. Most importantly they sustain hope and participation.

Leadership is always a process of using influence. Max De Pree, a noted writer on leadership, wrote in his latest book, *Leading Without Power: Finding Hope in Serving Community*,<sup>10</sup> that people working in nonprofit organizations have to deal with great complexity in society, and these people have become indispensable to its well-being. Nonprofit personnel are clearly providing leadership in moving toward a common good. De Pree's statement underscores, once again, the vital significance of providing leadership in the procurement of funds for running nonprofit organizations—for carrying out the causes that make up the fabric of our society. He talks about leaving a legacy. The fundraiser may not be recognized for the legacy left at the institutions served, but nevertheless the role in their success is a legacy. More often than not, buildings wouldn't be built, programs wouldn't be run, people wouldn't find fulfillment of needs and solutions to problems if fundraisers didn't play a leadership role in funding all these efforts.

In the Epilogue of his book, De Pree describes the seemingly hopeless summer of 1941, as the German army approached Leningrad. The staff of the Hermitage Museum packed the enormous collection of treasures, from paintings and sculptures to antiquities and artifacts, and shipped them to the east. Empty frames and pedestals were left in their places as symbols that someday the Hermitage

<sup>10</sup> De Pree, Max. *Leading Without Power: Finding Hope in Serving Community*. San Francisco, CA: Jossey-Bass, Inc., 1997.



would be restored to its greatness. Though the caretakers lost their art, they refused to lose hope.

The German armies surrounded Leningrad for more than two years, and the Russians endured a long and horrendous time. Food was scarce and attacks were frequent. In order to make a superhuman effort to preserve the Hermitage itself, the staff and their families moved to the basement of the building. Russian soldiers and citizens came regularly to help clean up the damage done by the artillery. The staff was grateful for this physical and moral support, and as a way of saying thank you, they conducted tours of the museum for these people. Even though the art and artifacts were missing, the Hermitage curators conducted tours, with soldiers and citizens standing in front of empty picture frames and forlorn pedestals. The curators described from memory and in great detail the absent treasures, filling in the blank spaces in the wonderful museum with their own dedication, commitment and love.

This is the picture of vision, service, commitment and leadership. This is what it means to see what others may not see and move to the potential of the organization's and individual's fulfillment. This, then, is providing leadership without having the recognizable and identifiable power and status. This is leading from the middle, something which fundraisers have done well for decades, and which the astute and successful fundraiser will recognize as one of the elements which will lead to professionalism and success in the field because real leadership is not a matter of authority, but a collection of attributes that set you apart from others.

### **Highlights of this chapter:**

- 1) Fundraisers often must practice leadership if the process and the goals are achieved, yet they are frequently not the top person in power or leadership.
- 2) Today's perspectives on leadership make it possible for a fundraiser to develop skills, traits and practices that provide for leadership from any level.
- 3) Fundraisers can learn how to demonstrate leadership for the benefit of their own practice as well as the organization.
- 4) Suggestions are included on how to approach leadership, both in learning the skills and in developing an attitude of leadership.



## Tracing the History of Fundraising in the U.S.

Fundraising as a function can be traced back to biblical citations (e.g., the building of the tabernacle in the book of Exodus), to classical Greece and Rome, to accounts of the middle ages such as comments on almsgiving, and to charitable acts and activities of Elizabethan England. In a mostly European and Judeo-Christian context, America grew up with the spirit of philanthropy. Private gifts from the wealthy in countries of origin helped develop and sustain not just America's colonies but also early institutions. Government support was also highly influential, but private generosity built the foundations of a philanthropic tradition in the United States.

Some authorities consider the fundraising efforts for the establishment of Harvard College in 1641 as the foundation of professional fundraising; others also point to College of William and Mary in Virginia. Still others believe that Jane Addams and the establishment of Hull House in Chicago in 1889 signal the beginning of organized philanthropy that included fundraising.

In spite of philanthropy having played a significant role in the history of the United States, fundraising as an organized and organizational function only dates back to the early 1900s.

The early 20th century is usually identified as the starting point of the professionalization of fundraising. This was partly due to the growth of paid staff, thereby changing the philanthropic landscape from one directed by volunteers to one of professionals who then directed volunteers. Cutlip, who wrote the most definitive history of fundraising in the United States, said, "Organized philanthropy supported by systematic fundraising is a twentieth-century development in the United States. Philanthropy, in America's first three centuries, was carried along on a small scale, largely financed by the wealthy few in response to personal begging appeals."<sup>11</sup> World War I, according to Cutlip, actually provided the foundation for organized fundraising, while others believe that the YMCA movement which began in the early 1900s actually provides the roots for modern fundraising.

<sup>11</sup> Cutlip, Scott M. Fundraising in the United States: Its role in America's Philanthropy, New Brunswick, NJ: Transaction, 1990 (original work published in 1965), p. 3

Various opinions prevail on how the eras of the twentieth century fundraising history are divided. Some researchers identify four distinct eras, others give generational views. Most respected volumes in fundraising practice ignore the historical context altogether, while for some professionals the chronological view is best because the profession is delineated by both change and continuity. Much of what is considered to be standard practice actually began by the creation of innovative techniques to meet certain needs.

Prior to World War I, fundraising was still quite unorganized and haphazard. Philanthropy was usually the domain of the wealthiest. During this period, the need to reduce the requests to the few identifiable donors caused the federated fundraising agencies to emerge. Eventually fundraising began to involve increasing numbers of citizens, particularly in the area of social welfare where organizations and people (e.g., Black churches, women as volunteers) had already been active. At this time, fundraising was the function of nonspecialists, especially volunteers.

Among those who began to lay the groundwork for formalized fundraising were Lyman L. Pierce and Charles Sumner Ward who are credited with developing the campaign method for the Young Men's Christian Associations. Others active during this era were individuals who served as leaders of alumni associations, such as William Lawrence, volunteer president for Harvard's association. Included in this era should be evangelists, such as Dwight L. Moody and Frederick T. Gates. The latter was able to solicit John D. Rockefeller for a major gift to establish a major institution—the University of Chicago.

The first commercial firm was established by Frederick Courtenay Barber in 1913 but because he charged a commission, his place in historical annals is usually discounted. The progenitors of today's consulting firms were established in approximately 1919.

In spite of on-going activity prior to World War I, fundraising was mostly recognized as the function YMCAs engaged in. Only as Ward and Pierce began to tutor others did the understanding of fundraising as a function and service expand. Ward is quoted in Cutlip as having said, "I would leave this work immediately if I thought I were merely raising money. It is raising men that appeals to me."<sup>12</sup>

The American Red Cross War Council was created at the beginning of the war with the purpose of combining fundraising for relief efforts. Ward and Pierce, on loan from the YMCA, were hired and raised record amounts of money. Another significant figure emerged during this time, John Price Jones. Coming from a newspaper and public relations background, he was the first to combine this experience with fundraising.

The YMCA's form of fundraising, which focused on Christian values stewardship, and Jones' businesslike approach to fundraising now joined to provide a foundation for modern fundraising—a combination of vision and mission with commercial overtones.

After World War I, consultants became more predominant in fundraising. In September of 1919 the firm of Ward, Hill, Pierce and Wells was established. This included recognizable and famous names and therefore business was brisk. Others who had received their experience in either the YMCA or the Red Cross campaigns now became the first wave of fundraising counsel—the pioneers. A major occurrence of this time was the acceptance of the fixed fee, not the commission-based fundraising that had been practiced previously. Also, in spite of the name-recognition of many who established or worked for firms at this time, the idea that the consultant must remain in the background and the attention should be on the organization came into fashion.

About this time the literature in fundraising received a boost. Harold “Si” Seymour, who was to write one of the first definitive books on fundraising, worked for the John Price Jones company. While with the company, he codified a Standard Practices volume which became the first training manual in fundraising history.

This era of fundraising consultants slowed down with the Great Depression. The campaigns, which had taken an identifiable format, faded, although Americans still gave, particularly for relief programs. Philanthropy now ceased to be the domain of the wealthy and the average citizen joined with government to provide relief. Because these were desperate days, fundraising practices took on some questionable aspects. As a result, the American Association of Fundraising Counsel was established in 1935 to preserve the integrity and promote the dignity of fundraising. These pioneers of fundraising as an organized activity attempted to position fundraising as a philanthropic effort, an endeavor that saw a merging of the ideological and philosophical with sound business practices.

Fundraising matured greatly between the two world wars. At the beginning of World War II, the Red Cross began a blood donor program; this was the result of increasing government intervention in relief funding and the Red Cross’s traditional services were no longer required. Because the Red Cross adapted to change and raised great sums of money, Cutlip has called it the greatest fundraiser of modern times.

After World War II, the example of the Red Cross caused many other institutions to begin raising money and for the first time in-house staff began to be hired. This was particularly true for colleges and universities who saw the need for more funds and increased goals, as well as the need for professionalism to accomplish this. During the post World War II period the need for fundraising campaigns soared; organizations began to seriously compete for charitable dollars. Much happened in fundraising, perhaps too much and too fast. There was little understanding of professional fundraising among the public. America’s ongoing discrepancy of opinion and feeling—sympathy for causes but antipathy for fundraisers—may have had its roots at this point. Lack of standards caused an understandable mistrust of fundraisers, although the public generally exercised its charitable impulses.

The 1950s saw an increase in federal funding programs. The government poured out funds in greater amounts than philanthropy had contributed, yet when the funding programs closed down private donors who had become accustomed to government programs weren't ready to close the gap. The nation didn't recover from this effect until the late 1970s.

In 1960 an influential and significant organization was established to serve the growing number of practitioners—the National Society of Fundraisers, renamed National Society of Fundraising Executives in 1978 and again Association of Fundraising Professionals in 2001. With this was ushered in the era of staff fundraisers, which continues until today. Nonprofit organizations set up development departments and conducted annual and capital campaigns, many of them multimillion dollar ones. The practice of placing resident consultants from fundraising firms at institutions began to fade with this influx of permanent staff and consultants became campaign advisors instead. More associations were also founded during this era, with the most recognizable being the Association for Healthcare Philanthropy, established in 1967. One final landmark of the sixties was the Tax Reform Act of 1969, which subjected charitable organization to new regulations.

The 1970s saw an expansion of fundraising strategies, such as telethons and door-to-door methods. The Council for the Advancement and Support of Education was formed in 1974 and in that same year Hank Rosso, Joe Mixer and Lyle Cook established The Fund Raising School. This was probably the first formalized training available for fundraising practitioners. Also in the seventies there was an increase in government oversight. These highlights of fundraising history show that the knowledge about philanthropy and the organizations which employ fundraisers increased considerably.

The 1980s brought an influx of fundraisers into the nonprofit arena. Much of this was due to government funding cutbacks. Also at this time public educational institutions began to seek support from private funds, something which many initially resisted. The race to compete became fierce. The fundraising function was internalized by this time, with consultants serving an advisory role. A significant organization formed in 1980, INDEPENDENT SECTOR, has been successful in representing donors and askers, and has served in an advocacy role ever since. This marks one of the points in history when donors and fundraising professionals began to work together in the arena of philanthropy.

The decade of the nineties was the era of many changes in fundraising. Some of these are:

- Increased professionalism in fundraising and proliferation of courses and training programs.
- A body of research and literature which provides a theoretical and practical base for the profession.
- An increasing demand for accountability by nonprofits.
- Consistent increases in philanthropic giving (although never higher than 2% of the GDP).

- Increased number of nonprofit organizations.
- Growing public interest and visibility in philanthropy and understanding of the nonprofit sector.
- Growing scrutiny of the sector and its organizations, and therefore increased criticism.
- A vast jump in the publications related to the sector, philanthropy and fundraising.
- A balance in how individuals enter the profession; i.e., no longer does everyone drift into fundraising, as many over fifty years of age did, but now there are formal ways to enter the profession.
- Challenges of increasing use of technology in fundraising, particularly the Internet
- Changing characteristics and behaviors of donors.

The professionalization of fundraising began to receive serious attention in the nineties. Considerable headway has been made in the fundraising field to bolster the argument that it is a profession. Various roles are appropriate for various organizations, and a person's strengths can be utilized in more than one way.

### **Highlights of this chapter:**

- 1) Fundraising is not new – there are historical records of people giving to each other or to good causes among ancient populations such as the Greeks and Romans. Accounts are abundant in the Bible and in the religious books of many faiths. All parts of the world are engaged in some form of giving and asking.
- 2) Fundraising as a formalized practice is relatively new. The United States was in the lead in organizing fundraising as a serious process and in developing the steps for fundraising as a profession today.
- 3) It is valuable for a fundraiser to understand the development of the profession as it guides today's practice, both to provide perspectives and to understand the “why” of what we do today.
- 4) Tracing the history of fundraising provides a professional with a sense of where he or she belongs in philanthropy and fundraising.





## Avoiding the No-Win Job

Fundraising is a noble – and mobile – profession. Although the average tenure of a fundraising professional has lengthened considerably since the 1980s, when it was estimated that the norm was about eighteen months, mobility is still a reality.<sup>13</sup>

Mobility is caused by several factors—salary, opportunities for advancement, desire for better working conditions or improved human relations, or termination. A major reason for leaving a job, however, is still because it's a no-winner. The job seems to be affected by the Murphy's Law syndrome – anything that can go wrong has! What the fundraiser thought the hiring organization said and expected from the organization turns out to be different or skewed. What the employer expected from the fundraiser was unclear or too optimistic. Expectations didn't match, and often fundraising professionals aren't definitive about what they can or can't do for the organization, therefore causing disillusionment from both sides.

The symptoms and dilemmas of a no-win job can be the following.

- Fundraising may be a low priority.
- Support staff is nonexistent.
- The development officer is not in the information stream.
- The prospect base is weak or absent.
- There is imbalance between cash donations and budgeted income.
- Board members make promises but don't follow through--they won't raise funds.
- Records are in a mess or missing.
- Marketing is not congruent with mission.

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<sup>13</sup> Member surveys by the Association of Fundraising Professionals indicate that length of stay in one position differs according to number of years in the profession. Those with less experience have, perhaps predictably, a shorter stay at one job. The overall average ranges from four to five and a half years.



- The board is micro-managing and will not adopt a policy role.
- The fundraising professional is expected to perform miracles – and do it alone!
- When goals aren't reached, blame often falls on the unfortunate yet most obvious culprit, the development professional.

If we're going to maintain a successful career path, promote excellence in fundraising, maintain our sanity and self-respect, and serve a cause we care about, we need to be smart as well as wise in assessing a new job possibility and setting mutual expectations that are realistic and achievable, yet meet organizational goals.

Here are seven points to ponder if we're going to achieve a mutually beneficial and workable situation, one that is satisfactory and appropriate for both the organization and the fundraiser – keeping in mind that there are no perfect jobs.

1. *Visit the site.* What is the mood of the corporate culture? Are people busy yet seemingly content? Is there indication of meaningful activity? It's usually apparent when employees are happy in their work. Place yourself in those surroundings and see if you "fit." Does the CEO introduce you to potential co-workers or ignore them? Does the board leadership welcome you or avoid you (assuming you're in a senior position)? If employees talk with you or have a chance to interview you, how guarded are they? Are they asking you meaningful questions and sharing relevant information? What is their excitement level? Is enthusiasm present?
2. *Discuss fundraising goals.* For starters, ask to see an annual fund gift range chart. Find out how much has been raised for the past five years, for example, and how the goal is determined. What is the cost to raise a dollar for each fundraising program component? Is the goal based on records, past achievement and logical expectations, or is it a seat-of-the-pants, crisis mentality effort?
3. *Ask to meet with board members, if possible, or at least learn about them.* Do they give? Do they raise funds? Is there a development committee? Will you have access to board members and other volunteers. If there is reluctance in sharing this information, that may be indicative of a problem. If board members are overly enthusiastic about your coming, it may be they see you as the answer to their fund raising reluctance. If board members insist on your making a certain number of calls a week, they are engaged in micro-management. If they say too many nice things about you, watch out. Do they engage actively in fund raising, or just provide lip-service? Board policies regarding giving and asking are of little use unless there's evidence they've been put into practice. If you're a senior development officer, meeting with the board's executive committee on a one-on-one basis is imperative.
4. *Ask to see a list of prospects and donors.* What you want to know is: who are the prospects? The donors? How much have they given? Have feasibility studies been done? Who's working with these

prospects? Is there a team mentality or will you be the main contact for donors and prospects? Is there a program in place to cultivate new prospects? How about records? Are they in place and being kept up to date?

5. *Ask about expectations for your job, **then ask again.*** Be honest with yourself. Can you really, truly meet the expressed expectations? Of course you want to “stretch” yourself. That’s why you’re looking at a different job. Of course you want a challenge. That’s why you’re a bit bored with your present work. But are the expectations congruent with what the organization has done, both in fund raising and in general program delivery? Beware of being seen as the answer to all prayers just because you come with a good track record and stellar reputation; your reputation could be seriously damaged if mutual expectations don’t match and are unrealistic, from either party.
6. *Check on the terms of your employment.* Are they contingent on certain goals being reached? Is a grant running out and you’re expected to meet the shortfall? Is the job contract or letter (and you should request such a document) clear on whether the position is temporary or term? How about job evaluation and review? How much and when can you expect increases in salary? What are the termination policies?
7. *Ask to meet and talk with support staff and colleagues who have been assigned to work with you.* Do they seem interested in what you will do at the organization, or do they seem puzzled about your role? Will you possibly work with staff who wanted your position? If so, what have they been told about their future roles? Are staff being nurtured and mentored? If you’re in charge, will you be allowed to terminate staff? What restrictions are there in creating your own team if the “chemistry” isn’t right or employees don’t want to change with new leadership and new policies as well as practices? You need staff loyalty in order to succeed. If there isn’t adequate support staff, say so now. Later it will be impossible to get clerical or even collegial help. Competent as you are, you might inadvertently give the impression or hint that you can “do it all.” You’d be better off taking on a job as a toll-booth collector or UPS delivery person if you have the slightest hint that you’ll be in this alone, or close to alone. Office procedures are also important. How does the phone get answered and by whom? Is there adequate computer, fax, voice mail and other technical support? Remember, your success is highly dependent on how the organization represents itself to the rest of the world. If phone calls are treated haphazardly, then you’ll have trouble communicating with the very people from whom you will seek donations. Are people willing to orient you, show you where relevant files and documents are, tell you about the quirks of the computer network, and where the restrooms are?

Most persons in a career and professional dilemma admit they should have taken more time to make the right inquiries. A good job might be passed up by such a logical and reasonable delay, but more likely, the good job will wait until the professional has asked the right questions, set up realistic expectations, determined the feasibility of teamwork, and defined just what is possible to accomplish.

Times are getting tougher for fundraisers, and organizations want more. Job expectations seem to increase as the funding pool decreases. No one is served well, least of the profession, when the fundraiser tries to fit in a No-Win job.

## **Highlights of this chapter**

- 1) Fundraisers tend to be optimistic, can-do people who see possibilities.
- 2) Therefore fundraisers may approach a job with a positive attitude and disregard realities and warning signs of a possibly negative position or experience.
- 3) A number of warning signs are listed, any number of which might derail a fundraising professional in a job.



## The Globalization of Fundraising

The practice of fundraising has grown dramatically around the globe. Beginning in the 1990s the role of governments was measurably reduced because of the emergence of new democratic cultures, technological advances in communications, and the inability of many governments to keep up with even basic services to its populations. Therefore there has been a rapid development of nongovernmental organizations (NGOs)<sup>14</sup> that can be service providers while also acting as advocates for reform. The final decades of the twentieth century saw a great shift in the social and political geography of the world which created both an opportunity and a need for citizens to become increasingly involved in the political and social lives of their communities, countries, and the world. Civil society provides a powerful means for mobilizing such citizen participation. As a consequence, national boundaries are not as important as international cooperation and collaboration, as well as cross-national understanding and collegiality.

The significance of NGOs, philanthropy, and voluntarism in other nations is growing. A Johns Hopkins University research team twice studied international NGOs in twenty-two countries in Central and Eastern Europe, Latin America, Western Europe, Oceania and North America as part of its Comparative Nonprofit Sector Project. They found a surprisingly large scale of nonprofit activity in almost every place that was researched. The reports confirmed that NGOs everywhere are seeing astonishing growth, employing increasing numbers of people, collecting and spending more money than at any previous time. The reports conclude that NGOs and Civil Society Organizations (CSOs) are a far more significant economic force than has generally been recognized, while the surge of voluntary activity has come amid a crisis of confidence in the ability of governments to deal with social problems. As a result, NGOs are having difficulty meeting growing needs while governments are cutting back on direct aid to citizens.

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<sup>14</sup> Nongovernmental organization (NGO) is the international, generally accepted term for nonprofit or not-for-profit organizations. Another term that is sometimes used is civil society organization (CSO).

However, international philanthropy is complex because even in established democracies, charitable organizations are different from those in the U.S. This is even more true in the fragile, emerging civil societies. Therefore cultural differences as well as foreign legal and political environments must be considered when the U.S. model of fundraising is applied. International charities are looking to American experts in large part because the United States has a long-established tradition of raising money from private sources. However, tactics that work for U.S. fundraisers at home may not necessarily always translate abroad. There is concern that countries which are experimenting with civil society and democracy may be overwhelmed by expectations, perceptions and the imposition of the U.S. model.

Philanthropy is present in every culture around the globe and every country has developed structures for organized fund raising. Often what those who contact U.S. resources seek is the structure for integrating fund raising into the administrative structure of nonprofit organizations and for building a total development program that includes major gifts, use of volunteers, and personal solicitation.

Many philanthropic fundraising principles are universally adaptable while at the same time they must be culturally and situationally appropriate. Within universality of principles and generalizations about fundraising, differences and similarities between the U.S. and international fundraising must be noted. It is useful for the fundraising practitioner to know which concepts and principles of fundraising can be universally applied and are adaptable. Some of these are:

The need and art of making a strong, compelling case for funding, and expressing this case in differing ways to different markets are concepts understood everywhere.

Donor motivations, when discussed as part of both training and practice, are surprisingly universal. Some differences do exist, but the desire to help others is often a motivation that can be aroused or tapped.

International fund raisers also understand the need to research and know the potential markets, the application of the exchange relationship in determining why a donor might give, and diversity in funding sources.

On the other hand, there are differences in principles and practice that international colleagues must deal with and U.S. professionals will respect.

The matter of professional compensation, such as working for a commission, is certainly without ethical challenge in many cultures.

Prospect research becomes difficult in some places because of lack of research resources as well as prevailing attitudes toward privacy. Consider as examples, the still-lingering hostility among

Germans for those who build dossiers on prospects and the impact of nearly fifty years of KGB activity in the former Soviet Union.

Board responsibility is uneven in many countries and the idea of board members seeking funds is often an unacceptable or at least unwelcome concept.

Tax deductibility and the concept of planned gifts do not exist in many nations.

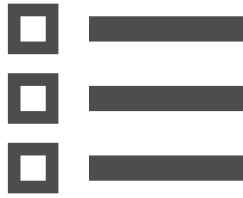
Fundraising as a profession is enriched by its proliferation and adaptation across nations and cultures, awareness of cultural issues, sensitivity toward differences, and the expression of a genuine appreciation of our international fundraising professionals' efforts and achievements.

Understanding international NGOs and fundraising aids comprehension of what is happening in the culturally diverse world inside our own borders. Understanding diversity on a global scale helps create an understanding of what is happening in local communities. In addition, philanthropy and the securing of funds to benefit others is an ancient practice and America represents only a portion of this rich history. Although professionals in the United States have perfected many fundraising techniques and have much to offer in terms of sharing expertise, there is also much to learn. International understanding enriches the global community of fundraising practitioners.

### **Highlights of this chapter:**

- 1) Reasons why fundraising as a professional endeavor has spread throughout the globe are presented.
- 2) The U.S. practices serve best as a model for other countries and their organizations to emulate. Differences in implementation are noted.
- 3) Perhaps the most exciting aspect of the globalization of fundraising is that fundraisers are part of an international movement with a vast impact on the services provided in all parts of the world.





## Additional Resources

For mentoring advice and opportunities to be mentors and be mentored, see [www.philanthropicservice.com](http://www.philanthropicservice.com).

For understanding the best fit between the fundraising profession and your personality, see STYLEWISE for effective philanthropy. Tour [www.StyleWise.info](http://www.StyleWise.info) for an overview. Contact Bob Fogal ([Bob@FogalAssociates.com](mailto:Bob@FogalAssociates.com) or 610-945-4955) to explore how STYLEWISE can significantly enhance your performance.

For fundraising books (and many related topics such as philanthropy and nonprofit management), see [www.philanthropicservice.com](http://www.philanthropicservice.com) under Resources.

For internship opportunities, see [www.philanthropicservice.com](http://www.philanthropicservice.com) under Programs, Career Opportunities.



Fundraising doesn't take place in a vacuum. It is an essential function in the entire scope of the nonprofit sector, which is supported by philanthropy. And philanthropy is a highly significant part of the fabric of American society, providing opportunities for fulfillment, meeting needs, addressing crises and disasters, and building sustainability for the future. A fundraising professional is the manager of a process that brings together a sense of caring with needs that must be met.

Whether you're a professional fundraiser, you're considering a career in fundraising, or you're beginning your first fundraising project, this book provides information that can help you meet your goals. Read this book to learn about:

- An Overview of an Ongoing Fundraising Program or Department
- Skills and Qualities of the Aspiring Professional and Fundraising Positions to Match
- Embarking on a Fundraising Career
- Fundraising Professional Development Pipeline
- Are We There Yet? Tracking the Path of Professionalism in Fundraising
- Leading from Any Level—the Fundraiser's Challenge and Opportunity
- Tracing the Development of Fundraising in the U.S.
- Avoiding the No-Win Job
- The Globalization of Fundraising

If you are considering engaging in fundraising for your church, school, or a non-profit organization, this book provides an overview of the wide range of possibilities for philanthropic action.



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