



The Glutton's Guide to Nourishing Your Not-for-profit Organisation

A month by month diet of governance,
management, marketing and fundraising
activities for community groups

**The Glutton's Guide to Nourishing Your Not-for-profit Organisation:
A Month by Month Diet of Governance, Management, Marketing and
Fundraising Activities for Community Groups**

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Foreword

This is not a diet book, except insofar as it subscribes to advice attributed to Oscar Wilde, Bart Simpson and Miss Piggy respectively:

- 1) Everything in moderation, including moderation.
- 2) You don't win friends with salad.
- 3) Never eat anything bigger than your head.

This book is designed to provide your organisation with an all-you-can-eat buffet of governance, management, marketing and fundraising activities.

For good health and longevity, we recommend a gluttonous approach. Go on, try a little innovation. Have another serve of partnerships. Anyone for thirds of strategy?

This is a book you can gorge yourself on. Bon appétit.

Denis Moriarty
Group Managing Director
Our Community

How to use this book

This book aims to help your organisation to plan its annual activities.

Some not-for-profit organisations structure their administration, financial reporting etc according to a standard financial year (July 1 to June 30).

Others use a calendar year (January 1 to December 31).

We've chosen to present this yearbook in calendar year order, because that seems intuitive to us, and because the book covers many "to do" items that are not regulatory requirements or related to finance.

Compliance requirements vary enormously depending on the legal structure of your organisation and the state in which you operate. For example, incorporated associations that are also charities registered with the Australian Charities and Not-for-profits Commission must (in most states and territories, but not all) report to their state regulator as well as to the ACNC. It's a dog's breakfast of regulation, enough to make any canine choke on its bowl of red tape.

Because of this complexity, it's impossible for us to tabulate every requirement for every not-for-profit in every state and territory. So we haven't. This book isn't a dull checklist of things you have to do to meet your bare minimum regulatory obligations.

Rather, think of it as a year's worth of ideas, tips and resources designed to help you get the most out of your meetings, your activities and your people.

Ultimately, they're all aimed at helping you to do one thing: to fulfil your mission.



January

It's very difficult in an Australian January to do anything that involves other people. Between school holidays, overseas trips and extended hangovers it's hard to get a quorum at your meetings and it's hard to catch anybody on their work number.

Looking ahead at the new year, at home or at work, you're facing some taxing decisions about what bits of your infrastructure you're going to fix up and which bits you're going to struggle on with for another 12 months. Are you going to paint the peeling windowsills before they rot? Are you going to replace that hook in the shed, the one that fell down in 1998? Are you going to fix the washer on that leaky tap in the bathroom?

Or are you going to write that risk management policy you've been promising? Are you going to upgrade your software? Are you going to bring in new blood for the board? What must you do immediately? What can you delay? What should you think more about before acting?

Your workload hasn't started to build up, and you can sit and think for a moment without having an urgent file dumped on your desk. Now is the time to review your operations and plan your repairs.

Review your mission and your plans. Review your governance and your constitution. Review your assets, your budget and your fundraising. Review your personnel and your donors. Review your diary and your media contacts.

Review your personal goals.

Wash the curtains. Change the pictures on the wall. Pretend you're starting a new job with a new firm.

Get up now and learn the cha cha.

It's a new, just-out-of-the-box year, and anything's possible if you commit yourself with enough passion.

JANUARY

FEBRUARY

MARCH

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AUGUST

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NOVEMBER

DECEMBER

Governance

SEVEN NEW YEAR'S RESOLUTIONS

1. Put first things first

"This year I'll put more time into what's important as opposed to what's urgent. I'll work on long-range strategic planning and building relationships with large donors – all the things that have the potential to make real improvements to our long-term prospects."

Managers do things right; leaders do the right thing.

2. Put first things first

"This year I'll take our goals seriously. I'll ask myself whether what we're doing fits with what we say we believe. I'll review our methods to see if we've dropped into doing things for their own sake, or because we've always done them, rather than because they help us reach our objectives. I'll establish a chain of short-term objectives leading to our larger goal."

Make sure that all your stakeholders and partners know where you're coming from. Agreed priorities give your proposals a force and decisiveness that cuts through a lot of the waffle. Write your vision on a large poster and stick it up in your boardroom. That's to remind you that you need to make decisions that are going to get you there.

3. Just do it

"I know what I have to do, so this year I'll just get on with it."

Value initiative. Take risks. Don't wait for direction from above. Make something happen. Plan, but don't procrastinate; consult, but don't delay. If others are holding things up, apply pressure. If they're still holding things up, find another way.

4. Give as you get

"This year I'll try to ensure that everybody goes away happy – that our relationships with donors, members, sponsors and partners are based on mutual benefit, and that we can articulate the potential gains to motivate cooperation."

One of the nice things about not-for-profit work is that you can produce win-win outcomes. If someone gives to your cause, you're both better off. If a company sponsors your event, you all gain. Keep this in the forefront of your mind. Review who helped you last year and write them a personal letter welcoming them back for the new year. Remind them what their help enabled you to achieve and where you're headed.

5. Understand and be understood

"This year I'll reach out to more people – prospects, stakeholders, agents of influence, clients, grantmakers – and I'll ask their advice, and I'll listen to what they tell me."

Giving the standard fundraising spiel to so many people so often erodes the habit of listening. An efficient organisation needs feedback, and an effective fundraiser needs empathy.

6. Double up

"This year I'll seek out alliances and partnerships to get more out of our projects – both within the organisation and across the field. We'll support each other to move into new areas."

When the whole is greater than the sum of its parts, that's synergy; and creatively managing the differences between partners is where the art of social entrepreneurship comes in.

7. Sharpen the saw

"This year I'm not going to get run-down, worn through, or burnt out. I'm going to recharge the batteries when I have to."

There's no good governance without self-care. Take time out to learn, read, or just sit and think. Get the work-home balance right. Don't get caught having to deal with the unexpected when you're dog-tired and under par. Self-sacrifice is absurdly inefficient.

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Fundraising

SEVEN BASIC FUNDRAISING DOS AND DON'TS

1. You've got to be in it to win it

Do ask. You have to ask in order to raise money. Studies reveal that the top reason people fail to contribute is that no-one has asked them to give.

Don't be reluctant in soliciting gifts. If you're not asking everyone for gifts, you're getting far less than you could be.

2. Fundraising, like charity, begins at home

Do demonstrate that all of your organisation's board members, officers and fundraisers make significant gifts to your campaigns. "Gifts" don't necessarily take the form of cash. Gifts of time, ties and talents are also valuable.

Don't have board members who do not give. Every board member should be asked to make a contribution in accordance with their ability to give.

3. All politics is local, and all fundraising is personal

Do choose fundraisers carefully. Donors, as a rule, don't so much give money to organisations as they give money to people – to people they know, trust and respect – which means that the person doing the asking is at least as important as the cause.

Don't have board members who are board members in name only. All board members must contribute to the fundraising process, whether it is by opening doors, asking for gifts, or identifying potential donors.

4. Know your donor

Do know your organisation and study its donors. People give for different reasons, at different levels, and in response to different needs and opportunities.

Don't be afraid to give donors different levels of recognition, depending on their gift.

5. Spot the talent

Do concentrate on individuals. Corporations and foundations control substantial resources, but individuals are by far the largest source of funding – more than 80 per cent – for not-for-profit organisations. *Don't forget to do your homework.* Many organisations fail to adequately research their potential donors' income levels, giving history and personal interests.

6. Spread the load

Do spread your efforts. Just as your personal savings are safer if you diversify your investments, your organisation is safer if you raise funds from several different sources, including individuals, corporations and foundations. Never depend on a single angel. *Don't put all your eggs in the one basket.*

7. Organisations cannot live by gifts alone

Do charge those who can afford to pay. In America, for example, earned income – fees for service, sale of products, royalties, etc. – provides the average not-for-profit organisation with about half its income. *Don't forget that when you charge like a business you're going to be expected to operate in a businesslike fashion.*

SEE ALSO:

You'll find help sheets and expert guidance on fundraising strategy (fundingcentre.com.au/help/fundraising-strategy) and funding sources (fundingcentre.com.au/help/fundraising-pillars) at the Funding Centre, an initiative of Our Community.

Marketing

SEVEN STEPS TO A PERFECT WORLD

Every one of your fundraising stories needs to cover these points.

1. Who's hurting?

Who or what will you put forward as one particular poster child from the bad imperfect world?

2. Define the need

What's wrong with that world? How is your child hurting?

3. Describe the dream

What's your perfect world?

4. Show how you're going to fix it

How are you going to build your perfect world?

5. Say what you need to fix it

What resources does your group need to build the perfect world?

6. Show people how their money can make it happen

Which little bit of the perfect world can they pay for?

7. Who's happy now?

How much happier is your poster child in this perfect world?

Management

Before Christmas you were working like a slave at a rapidly increasing tempo to get through the usual jobs, to organise your Christmas festivities, and to get far enough ahead with your duties to be able to contemplate a couple of weeks off to loll on the beach this month.

Afterwards – quite some time afterwards – you come in to work, throw away the shrivelled-up pot plants, remove last year's milk from the fridge, take note of the 700 emails in your inbox, pile the mail into a too-tall stack, look at the files you left in the too-hard basket on December 23rd, sit down at your desk, sigh deeply, and wonder why you ever thought you were suited for this business.

You need jumper leads to get you going again.

SEVEN STEPS TO GETTING STARTED AFTER THE BREAK

Before you close in December, document your work in progress. Leave your files with notes of what's to be done next, and put copies of those file notes in your next year's diary. Check whether there are any suitable grants with closing dates over the break, and arrange someone to deal with them.

Then, when you get back:

1. Update your timetable

Find out what's overdue, what's urgent, and what's still on track so long as you don't get thrown off course. Work out how long you have to meet your goals for the year. Trace the timelines back from your events. Put advance warning markers in the diary to give you time to get your head around things. Check the Easy Grants database (fundingcentre.com.au/easygrants) for the due dates of grants you're interested in applying for.

2. Build momentum

When Ernest Hemingway was writing a novel he always made sure he was in the middle of a sentence when he stopped work for the day; it made it easier to pick up the pace again the next day. Look over the projects in hand and identify the next step. Pick out a grantmaker that you've approached before. Start off with a swing.

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3. Bring the budget up to date

How are your finances going? Are you on track? If not, are you going to have to gear your fundraising up a notch? Are you going to have to make any cuts? Do you have to chase any promised donations? Have any of your assumptions and expectations changed? Organise a meeting with your fundraising committee to go through your fundraising strategy line by line and set new goals for the coming year.

4. Work the media

January's a slow news month (bushfires aside), so you should be able to get a story in. Send out a media release on how well you did last year, what your focus is and what is needed in the coming year to make your community a better place. Put in a plug for donations if you can.

Use the opportunity to check through your media contact book. It's a good time for setting the agenda – and if you can do that in January, there's a fair chance you'll still be setting it in December.

5. Review your plans

It's not easy to maintain an overall vision of where you're going, and it's worth taking a moment to reorient yourself. Get out your three-year plan and compare it with now where you are. Review your long-term funding trends and ask yourself whether you need to change your approach. Is your emphasis right? Are your methods stale? What's hot?

6. Motivation

Shake up the team. Start the year off with a meeting focussing on long-term goals (based on your long-term plan). Give a presentation on the good work you did last year (if you can't sell it to the staff, you'll have a hard time selling it to the public) and get feedback on how well you're proceeding towards your goals. Ask for ideas whose time has now come. Ask for ideas on beefing up the fundraising take.

7. Know why you're there

Review your personal goals. Think through your commitment to the organisation. Pick up on the enthusiasm that should by now be coming from the team. Renew your attachment to the cause you serve. Make sure you're ready to explain all that to someone in a lift. Use that renewed commitment to justify asking more people for larger donations, more often.

Life

SEVEN RESOLUTIONS FOR THE 21ST CENTURY

1. Focus on niche marketing, not mass branding

Play to your strengths. Take opportunities to target prospective givers personally rather than direct mailing to the whole world. The more personally you ask for money, the more success you'll have.

2. Present big, audacious projects

It can take as much time, energy and money to conduct a \$5000 fundraising campaign as it does to conduct a \$500,000 campaign. Big gifts flow to a big vision. Givers respond to big, audacious goals (although you do need to demonstrate that the money being raised will make a real difference to the lives of real people).

3. Become a social business

New social businesses are evolving and ready to meet the fresh challenges that rapidly changing circumstances dictate. Greater leisure time, longer life expectancies and higher disposable incomes have led to more people becoming more actively involved in the causes in which they believe. Higher standards of accountability and management skill are being demanded of not-for-profit organisations. Weak institutional planning and poor fundraising will not be tolerated.

4. Create stakeholders, not just consumers

Our social businesses must be geared not only to the creation of satisfied consumers: we also need stakeholders – people who get involved in a not-for-profit by giving their time, work and money. More often than not, the funds an organisation needs come from its closest supporters rather than from distant benefactors. Powerful fundraising organisations build relationships directly with people. Take a moment to reflect on who else might share your dreams.

5. Go beyond social media

Social media creates a multitude of weak bonds. Your organisation has to be able to take that fingerhold on the individual and use it to coax them into a stronger relationship where you can ask them for the kind of real commitment that will pay off for you and for them.

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6. Cultivate volunteer relationships

Renew your bonds with the community. Volunteers contribute many millions of hours to not-for-profit organisations. These volunteer workers and givers will only be enlisted and engaged through real relationship management. Rather than just talking about the latest marketing buzzwords, build your fundraising projects around an understanding of the specific interests and involvements of your supporters. (Take a look at the volunteering help sheets at givenow.com.au/otherways/givetimehelpsheets for more on this.)

7. Use big data

A meaningful relationship-fundraising plan relies on smart database managers and the right information management systems for the particular fundraising campaign you want to launch. Information management is giver-focused, not management focused, and will allow you to extract actionable 'knowledge' from the information you hold.