



# view from the **EDGE**

**JANUARY 2009**



Jim Shapiro



Shannon Barnes

## **Learning from the Past**

### **What last year's year-end giving statement tell you about 2009**

As we transition into a new year, this is a great time to evaluate your past fundraising efforts and plan new future tactics and strategies.

When reviewing historic data I like to analyze donor and giving trends from one year to the next. With this in mind, I'd suggest analyzing the number of active donors and total amount given in 2008 compared to 2007.

In addition to looking at historic trends, this time of year is perfect for securing new gifts and commitments for 2009. It is common practice for nonprofit organizations to send annual giving summary statements to their donors so they can have accurate records to prepare their taxes. These giving statements are a great platform for donor appreciation and new gift acquisition.

In place of your typical financial document, leverage this opportunity to draft a simple letter that reports positive mission driven outcomes from the past year to your donors. At the end of this letter ask your donors to make a 2009 financial commitment by increasing their 2008 giving by 10% or more. You can secure these gifts by encouraging your donors to pledge this amount throughout the year.

Make the most of the New Year. It's a fresh start for our donors, our mission, and our fundraising plans! JS

## **Learning for the Future**

The economy has dramatically changed the philanthropic and charitable landscape. Organizations that strategically and intentionally respond to these changes will survive and thrive in 2009. The EDGE Group has responded to these changes by crafting fundraising and leadership strategies for leaders of nonprofit, charitable, and church organizations. See the next page for a list of upcoming training opportunities.



## Survive and Thrive in 2009

### Free Webinars, Seminars, and "Ask EDGE" Discussion Groups

#### Seminar – Seattle, WA

Creating an Annual Fundraising Plan that Works!  
Wednesday, January 14, 9:30–11:30 a.m. (PST)  
Lake Union Windermere Training Center

#### Webinar – The Strategic EDGE: Impact Plans for Uncertain Times

Wednesday, January 14, 1:30–2:00 p.m. (PST)

#### Seminar – Seattle, WA

Moving Board Governance from Good to Great  
Wednesday, January 21, 9:30–11:30 a.m. (PST)  
Lake Union Windermere Training Center

#### "Ask EDGE" Teleconference for Nonprofit Leaders

Friday, January 23, 1:30–2:00 p.m. (PST)

#### Webinar – Creating an Annual Fundraising Plan that Works!

Wednesday, January 28, 1:30–2:00 p.m. (PST)

#### Seminar – Orange County, CA

Moving Board Governance from Good to Great  
Tuesday, February 3, 9:30–11:30 a.m. (PST)

Register for all of these events at [www.theEDGEgroup.org/thrive.htm](http://www.theEDGEgroup.org/thrive.htm).

## Ask EDGE

Here's our answer to a recent leadership question we received: *Suppose you are appointed Executive Director and asked to lead a staff of high-producing, type-A people who have been involved in the organization for a long time. Say you are tasked with taking this team to "next level results". Any advice on the best way of making a great first impression and taking charge? – Christopher*

Christopher,

I firmly believe in "plan with people, not for people." Since you are inheriting a team of competent, talented "high producers," I would bring the question of "next-level results" right to them.

Communicate your admiration for their past results, communicate your sense of the team's strength's based on past performance, and then communicate the challenge/directive you've been given. With a SWOT analysis (or something like it), you can begin a conversation that is team-driven, not top-down. The likelihood of a quick start and ultimate mission success is greatly increased. SDB

### EDGE Blog

You'll find lots of information and thoughts on numerous leadership, strategic and fundraising questions at <http://theedgegroup.blogspot.com>.

### Website information

Check it out at [www.theEDGEgroup.org](http://www.theEDGEgroup.org).

### Book Recommendation

*Nonprofit Stewardship: A Better Way to Lead Your Mission-Based Organization* by Peter C. Brinckerhoff. An excellent book from one of the most prominent and prolific nonprofit consultants and authors. Extensive and comprehensive organizational material, all focused on helping you "do more good."

### Contact Information

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## **The Time Is Now**

If you wait for the perfect moment when all is safe and assured, it may never arrive. Mountains will not be climbed, races won, or lasting happiness achieved.

Maurice Chevalier, French Singer and Screen Actor