



ACHIEVING EXCELLENCE IN **FUNDRAISING**

FOURTH EDITION

EDITORS

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WILEY



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Eugene R. Tempel, Timothy L. Seiler,
and Dwight F. Burlingame,
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"Anyone interested in what Hank Rosso calls 'the joy of giving' will find value in this carefully edited book. Its comprehensive coverage and thought-provoking content provides numerous opportunities for reflection on what is required and what it means to be an effective and ethical fundraiser. In this fourth edition of a now classic text, the authors continue to advance the profession of fundraising. We are treated to updated information, findings from recent scholarship, and an instructor's guide to further enhance learning."

—**Mary Tschirhart**, Professor, The Ohio State University; co-author of *Managing Nonprofit Organizations*

"Achieving excellence in fundraising is an important goal for CASE members worldwide who have chosen a career in the field. There is much debate as to the extent to which fundraising is an art or a science. The reality is that to be excellent, it has to be a combination of both, delivered with commitment, passion and integrity. New ideas and innovation continue to develop in the rapidly changing world of community and connectivity. Valuable, therefore, to have this fourth edition of *Achieving Excellence in Fundraising* which not only reminds us of the essentials of fundraising principles, but also covers new ground. The chapter on the opportunities availed in the 21st century through fast evolving social media is timely. As is the chapter on the joys imbued in philanthropic support including evidence both of the contagiousness of giving and its life enhancing and extending qualities! For those coming fresh to a career in fundraising there is much to discover here. For those who have made a career in this life transforming profession, this book provides helpful reminders and considerable food for thought."

—**Sue Cunningham**, President, Council for Advancement and Support of Education

"Achieving excellence in fundraising is a major goal of the best nonprofit CEOs and development professionals. This fully updated and comprehensive volume covers everything from developing the right philosophical approach to fundraising to understanding how to establish and execute both old and new fundraising strategies, as well as how to create and manage a development office. This book will be invaluable to both emerging and seasoned fund development professionals."

—**Emmett D. Carson, Ph.D.**, Chief Executive Officer, Silicon Valley Community Foundation

"Philanthropy is uniquely invaluable to the well-being of culture and community, and *Achieving Excellence in Fundraising* remains uniquely invaluable to the advancement of philanthropy. The Fund Raising School has relied on all previous editions of this knowledge-filled book to deliver highly impactful training to fundraising professionals around the world. This 4th edition combines timeless wisdom with the latest research-based strategies that are essential for fundraising success in the 21st Century economy."

—**Bill Stanczykiewicz**, Director, The Fund Raising School and Senior Lecturer, Philanthropic Studies, Indiana University Lilly Family School of Philanthropy

"It is fitting that this fourth edition of *Achieving Excellence in Fundraising* marks the transition from what was once a center on philanthropy to now the Indiana University Lilly Family School of Philanthropy. Yet, more importantly, this edition reaffirms the principles of the former center's visionary, Henry A. 'Hank' Rosso, whose voice and ideas reverberate and are woven within each essay, particularly, Gene Tempel's introduction who further inscribes, etches and connects Rosso's legacy to the IU Lilly Family School's present and future."

—**Brian Johnson, Ph.D.**, President, Tuskegee University

"It's hard to imagine a more useful addition to the bookshelves of nonprofit professionals. But this book won't just sit on the shelf—fundraisers, board members and nonprofit executives will find it to be a handy and astute reference guide to building a comprehensive giving program. I've kept this book close at hand in every nonprofit job I've had. The new edition is based on many decades of research and professional experience from some of the top experts in the field, and is a useful reference guide for building stronger relationships between grantmakers and fundraisers."

—**Caroline Altman Smith**, Senior Program Officer, The Kresge Foundation

"This book is an indispensable resource for both the fundraising novice and the seasoned professional. It is a current and comprehensive collection of essays written by highly respected professionals and touches every dimension of philanthropy. I strongly recommend it for everyone working in the philanthropic sector."

—**Rodney P. Kirsch**, Senior Vice President for Development and Alumni Relations, The Pennsylvania State University

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Handbook of Practical Program Evaluation, 3rd edition, by Joseph S. Wholey, Harry P. Hatry, & Kathryn E. Newcomer (Eds.)

The Instructor's Guide for the fourth edition of *Achieving Excellence in Fundraising* includes syllabi and supporting materials for semester-long undergraduate and semester-long graduate versions of the course. The Instructor's Guide is available free online. If you would like to download and print a copy of the guide, please visit:

www.wiley.com/college/tempel



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INDIANA UNIVERSITY
Indianapolis

The Indiana University Lilly Family School of Philanthropy is the world's first school dedicated solely to education and research about philanthropy. Established in 2012, the school was inaugurated in 2013 and named for one of America's great philanthropic families in honor of their generations of generosity and leadership.

Indiana University has been at the vanguard of philanthropy education since the Center on Philanthropy at Indiana University was founded at Indiana University—Purdue University Indianapolis (IUPUI) in 1987. Led by the center, Indiana University (IU) established the field of philanthropic studies; established the nation's first bachelor's, master's, and Ph.D. degrees in the field; and created the nation's first endowed chair in philanthropy.

The Lilly Family School of Philanthropy prepares students, philanthropy professionals, donors and volunteers to be thoughtful innovators and leaders who create positive and lasting change. Alumni of its programs lead national nonprofits and foundations, serve international relief organizations, and lead hands-on neighborhood human services centers.

As the pioneer of the unique, liberal arts-based field of philanthropic studies, the school and its world-class faculty offer unparalleled academic degree programs and rigorous, objective research that sets the standard for the field and provides a crucial resource for philanthropy and nonprofits. Through global partnerships, teaching and learning experiences on six continents, and an international student body, the school increases understanding of philanthropy within and across cultures.

The Lilly Family School of Philanthropy integrates innovative academic, research, international and training programs with groundbreaking resources such as The Fund Raising School, the Women's Philanthropy Institute, and Lake Institute on Faith & Giving.

The Fund Raising School, which Hank Rosso moved to Indiana University in 1987 to form the centerpiece for the founding of the Center on Philanthropy, continues today as the premier international, university, and curriculum-based fundraising education program. For the more than 40 years since its founding in 1974, The Fund Raising School has taught successful, ethical, systematic, mission-focused fundraising, volunteer board leadership, and nonprofit management practices to more than 43,000 people in more than 40 countries. Experienced fundraising professionals comprise The Fund Raising School's faculty, offering multiple online and in-person sessions of 15 different regularly scheduled courses in Indianapolis and in cities around the nation as well as sponsored, customized courses in locations around the globe.

As a hub for philanthropic thought and research, the Lilly Family School of Philanthropy regularly convenes innovators, scholars, philanthropists, fundraisers, nonprofit and foundation professionals, and researchers to share their diverse perspectives, exchange ideas, and develop insights that anticipate trends, address pressing issues, and shape the future of philanthropy.

For more information, please visit: philanthropy.iupui.edu.

This book is dedicated to the Trustees of Indiana University, University and campus leadership, donors and funders, faculty and staff who believed in the potential of, and took the bold steps to create, the Indiana University Lilly Family School of Philanthropy.

FOREWORD

The mark of a vital institution is that it renews its traditions to stay in tune with the times. A mark of a great institution is that it spawns other institutions and traditions, celebrating their multiplicity as they thrive. Such is an institution that is being renewed in the 4th edition of *Achieving Excellence in Fundraising*.

The book contains new research and fresh voices that update and complement the lasting wisdom as formulated by Hank Rosso, the editor of the first edition. Hank's vision of an ethical, joy-inducing, and dignified profession has come to guide many who practice and study philanthropy. The Fund Raising School he brought to Indianapolis served as the seed of the Center on Philanthropy, now the Lilly Family School of Philanthropy at Indiana University. The four decades of instruction in the curriculum he crafted thrived on a creative tension between the research findings of academics and practical feedback from those in the field. This creative collaboration is in evidence in the current volume, which succeeds in that rare accomplishment – integrating the insights of professors and practitioners.

Just as the legacies of Hank Rosso, Robert Payton, Charles Johnson, and others of their time are seen in these pages, so is the institution building work of our current editors. Tim Seiler has been at the helm of The Fund Raising School for two decades and has inducted legions of passionate students into the ranks of the globally expanding fundraising profession. He extended the brand and impact of

The Fund Raising School with a dogged focus on integrity and attention to what is actually known, and known to work.

Gene Tempel was involved in the founding of the Center, and after a quarter century of nurturing Indiana's role at the epicenter of serious philanthropic deliberations, he achieved the launch of the world's first School of Philanthropy and served as its founding Dean. A "pracademic" (a word I learned from him), in the sense of successfully straddling the divide between research and practice, Gene has stewarded this book over the years as a reflection of the work being done in Indiana.

Dwight Burlingame is the academic soul of the book and of the School that has risen in tandem with it. He has written key works on philanthropy, mentored current leaders in the field, edited seminal series of publications, and established venues for researchers to explore questions about the once much more mysterious practices of giving and asking.

Together Tim, Gene, and Dwight have constituted a singularly important node for multiple networks of practitioners, institution builders, and academics in the philanthropic sector worldwide. Ask anyone you respect in the world of philanthropy, be they donors, fundraisers, or academics, and ask them to examine the tapestry of their professional relationships. It won't take too long for them to identify the threads that lead back to our editors and the work they have pioneered in Indiana.

If you do not yet have your own thread to connect you to Indiana, you are about to have one.

As with the original edition, this volume "has integrity as a holistic work." However, there are different pathways you can take through the volume. It can be used as a textbook or a reference source when particular issues arise, or even as an aid when some inspiration is needed in the midst of an operational or moral conundrum.

Novices will find essential concepts explained clearly and located within a context that gives them meaning and relevance. The experienced professional can delve into contemporary research such as work on empathy that informs the joy of giving, while also brushing up on fundamentals of relationship building that have withstood the test of time. Those who lead organizations will find descriptions of proven operational structures and guidelines for managing the variety of processes that make up a comprehensive fundraising effort. Trustees and volunteers can understand how they can be most useful to their organization, and how they can allow themselves to be most usefully managed by staff leadership. All of us will benefit from wrestling with the difficult issues when we need be sure that we stand on solid ethical ground. In addition, readers from inside and outside

professional philanthropy will be keen to read about the changing professional identities and career paths of fundraisers.

Finally, the book is a collaborative effort of faculty and practitioners who have poured their knowledge and dedication to philanthropy into its pages. By reading *Achieving Excellence in Fundraising* you join an institution that flourishes by enabling others to succeed in their passion to improve the world.

Amir Pasic

Dean

Indiana University Lilly Family School of Philanthropy

May 2015

PREFACE

The fourth edition of *Achieving Excellence in Fundraising* has its foundation in the lifetime of work by Henry A. “Hank” Rosso. He had a dream that colleges and universities would provide research education and training to help build the foundation for professionalizing fundraising. He published *Achieving Excellence in Fund Raising* in 1991, bringing scholars and practitioners together to help fundraisers better understand and do their work. In the foreword to the first edition, Bob Payton projected that the book would become a classic. The fourth edition being published 15 years later is evidence that it has. It is also a reflection of how farsighted Hank was in his work. Many of the principles that he espoused have been confirmed or modified by research. The longevity of The Fund Raising School, the continuing validity of many of the principles taught originally in The Fund Raising School, and the modification of others through time are further evidence.

The first three editions of *Achieving Excellence in Fund Raising* were supported by the Indiana University Center on Philanthropy that housed The Fund Raising School founded by Hank in 1974. In 2012 the programs and the institutes of the Center, including The Fund Raising School, became part of the Indiana University Lilly Family School of Philanthropy. The publication of the fourth edition marks the transition from the Center on Philanthropy to the Lilly Family School of

Philanthropy. One of the milestones in that transition is the School's continued commitment to do research and offer education and training related to Hank's work in the founding of The Fund Raising School.

The first challenge of a nonprofit organization is to survive its founder. The Fund Raising School has survived its founder. The Fund Raising School has now existed as an integral part of the Lilly Family School of Philanthropy longer than it existed as a separate independent organization. Hank and his wife Dottie founded The School in 1974 and it celebrated its 40th anniversary in 2014. It became part of the Center on Philanthropy in 1987. Hank served as an advisor and mentor to all of us until his death in 1999. Tim Seiler has been the Director of The Fund Raising School for 20 years, from 1996 to 2015. The current Director, Bill Stanczykiewicz, began serving as Director on June 29, 2015.

The fourth edition reflects a commitment to the original principles and philosophy that are the hallmark of achieving excellence. It also reflects the changing environment for philanthropy and fundraising, new developments in the way fundraising work is done, and the increasing understanding and knowledge about philanthropy and fundraising developed by the Lilly Family School of Philanthropy, other colleges and universities, and research organizations across the United States and around the world.

The editors of this volume knew Hank Rosso personally. They interacted with Hank, served on panels with Hank at conferences and symposia, and they understood Hank's philosophy. The fourth edition is transitional in another sense. If *Achieving Excellence in Fundraising* is to continue to be the classic that Bob Payton predicted, it must not only reflect the growing body of knowledge about fundraising and philanthropy but it must also be embraced by a new generation of scholars and practitioners. The fourth edition is a step in that direction. All the authors in the fourth edition are philanthropic studies faculty members at the Lilly Family School of Philanthropy, alumni of the School, or current faculty members of The Fund Raising School. Most of them did not know Hank.

The first edition was promoted primarily as a way to help provide knowledge for a rapidly growing fundraising corps. The number of members of the Association of Fundraising Professionals (then NSFRE) grew significantly from 1980 to 1990. The third edition is being used as a textbook by faculty members teaching fundraising, philanthropy, and nonprofit management courses in colleges and universities today, so the fourth edition was written and edited with its being used as a textbook in mind.

The work of philanthropy is about the work of public purposes and causes – the public good. Philanthropy rests on the power of the case for support. It also reflects the interest and desires of donors to accomplish something beyond themselves. The work of fundraising is about substituting pride for apology. The fourth

edition focuses on respect for the process of fundraising, respect for the donor, and respect for the individuals being served by the nonprofit organizations that fundraisers represent. It focuses on the importance of language in conveying that respect. We do not “get” gifts. Hank taught us that fundraising is the work of teaching people the joy of giving. Sara Konrath’s research, as she writes in Chapter 2, substantiates this concept. Fundraisers do not make “the ask,” which implies a confrontational situation between volunteers and fundraisers and the donors from whom they seek gifts. They solicit gifts by inviting donors to join them in supporting worthy causes. Although demographics and psychodemographics are important in understanding donors and engaging them with organizations based on their own interests, fundraisers do not “target” donors, and they do not “move” them toward desired ends. It is important for us to understand these concepts today with the sophistication of donors, with the interest of donors following up on their gifts at smaller levels, and with the new generation of philanthropists committed to making things happen today.

Organization of the Fourth Edition

The fourth edition of *Achieving Excellence in Fundraising* has been reorganized to bring more chapters more closely together around key fundraising execution. Some chapters from the third edition have been combined. Chapters have been updated and edited. New chapters have been added to reflect important new areas of knowledge and changing dynamics in philanthropy.

The fourth edition has been developed as a textbook for academic courses in fundraising, philanthropy, and nonprofit management. An instructor’s guide is available from the publisher at www.wiley.com/college/tempel. It can also be used by practitioners as a reference in their own work and to help them prepare for the CFRE exam.

The 37 chapters of the fourth edition are grouped into eight parts. Part One consists of five chapters that form the essential context for understanding and engaging in philanthropic fundraising.

Part Two consists of eleven chapters that prepare fundraisers to understand philanthropy from various perspectives of donors, not only individual donors but also foundations and corporations as donors.

Part Three includes four chapters that focus on the structural aspects of a total development program. The total development program ranges from the annual fund program to the planned giving program. This section helps fundraisers understand how the various programs support one another and how they interconnect.

Part Four consists of five chapters dedicated to the management of the total development program. This includes organizational readiness for fundraising and using consultants for special purposes.

Part Five includes five chapters that discuss the different ways fundraisers and their organizations can engage donors and invite them to make gifts at different levels. It outlines how different approaches are appropriate for different levels of gifts and gifts for different purposes.

The three chapters in Part Six focus on the external nature of fundraising and philanthropy and include the current call for greater transparency and accountability by an organization's various constituents.

The two chapters of Part Seven deal with the ethical and legal framework for fundraising.

Finally, Part Eight is about professionalism, with one chapter on building a career and the other on the resources available to assist in that development.

Reflections on the Fourth Edition

As mentioned in the Acknowledgments, we have transitioned from administrative roles to faculty positions and look forward to how the fourth edition is embraced by university faculty as well as by fundraising practitioners. In dispatching our contribution to the academic study and the practice of fundraising, we look forward to the fourth edition adding to and enriching the discourse surrounding philanthropic studies and philanthropic fundraising.

We note that our work was previously supported by the Indiana University Center on Philanthropy. We are grateful to have the continued support of the Indiana University Lilly Family School of Philanthropy.

We fervently hope that the addition of more research-based chapters, others supported by research, along with the chapters that reprise time-tested, nearly universal principles of effective fundraising practice, if successful, will serve not only as an overview of current philanthropic fundraising but will also prepare the upcoming generation of scholars and practitioners to produce in its time the fifth edition of *Achieving Excellence in Fundraising*.

ACKNOWLEDGEMENTS

The fourth edition of *Achieving Excellence in Fundraising* would not have been possible without the first three volumes. We are again acknowledging Hank Rosso who founded The Fund Raising School in 1974, and in 1991 accepted the challenge to share his knowledge and experience with a larger audience by editing the first edition of this book. We also acknowledge The Fund Raising School which has grown and developed from the day when Hank Rosso transferred it to Indiana University to help establish the Center of Philanthropy in 1987 to its current status as a key part of the Lilly Family School of Philanthropy. This book also owes deep gratitude to the Lilly Family School of Philanthropy for its sponsorship and for the role it has played in the development of Philanthropic Studies as a field, for its research dedicated to philanthropy and fundraising through the years, and for the contributions it has made to the development of The Fund Raising School, the Women's Philanthropy Institute, the Lake Institute on Faith and Giving, the development of baccalaureate-, master's-, and doctoral-level programs at Indiana University. These assets all help shape the fourth edition of *Achieving Excellence in Fundraising*.

A word of thanks to Hank's wife, Dottie Rosso, one of the founders of The Fund Raising School. Her encouragement for the continuation of Hank's legacy and her affirmation that the programs of The Fund Raising School and the Lilly

Family School of Philanthropy fulfill Hank's vision for the study of philanthropy and fundraising have been a source of support.

Thanks to all the authors who contributed to the first three editions of *Achieving Excellence in Fund Raising*. Special thanks to all the authors and contributors to the fourth edition of *Achieving Excellence of Fundraising* as well. They include Philanthropic Studies faculty members, faculty of The Fund Raising School, staff of the Lilly Family School of Philanthropy, and alumni. All have contributed to the ongoing development of knowledge for this book and for the field. We are grateful for the research developed through the Lilly Family School of Philanthropy by the Indiana University Philanthropic Studies faculty and faculty and researchers around the globe who have contributed to the development of knowledge these past 25 years.

Thanks to Lilly Endowment for support of the fourth edition of *Achieving Excellence in Fundraising* as part of a transition Grant to the Lilly Family School of Philanthropy. The editors themselves have gone through transitions. Each has stepped down from long-term time service in administrative and leadership roles in building philanthropic studies and The Fund Raising School to become members of the Philanthropic Studies faculty at the Lilly Family School of Philanthropy, for the version of this book marks their transition as well.

The Lilly Family School of Philanthropy and Wiley have initiated many projects together. This is as true now as it was when the first three editions were published. We owe gratitude to Wiley for continuing to publish books that help strengthen the nonprofit sector especially fundraising and philanthropy. And special thanks to our editor at Wiley, Matthew Davis, who encouraged the development of this fourth edition.

Each of us has a special word of thanks to our staff and colleagues who supported our involvement in this project and covered for us in other ways from time to time. To our families we send heartfelt thanks for their unending support and sacrifice throughout our administrative careers and during the development of this book.

Thanks to Elisabeth Lesem, the Hartsook Fellow at the IU Lilly Family School of Philanthropy and Gene Tempel's graduate assistant. She did heavy lifting on this project. Not only did she help coordinate the solicitation of chapters and the application of unified standards with all the offers, but she also contributed research and co-authored several chapters as well. We all owe Elisabeth a debt of gratitude for her work on this edition until she graduated with an MA in Philanthropic Studies and became the Foundation Officer at the Indiana Repertory Theatre. We hope her work on this volume serves her well in her career.

Special thanks also to Sarah Nathan, a Lilly Family School of Philanthropy alum and faculty member at Bay Path University, who managed the production