

Axelson Review

INSPIRE. EDUCATE. CONNECT. WINTER 2007

Mapping Out the Future

In a word, *movement* best describes the activities of The Axelson Center since our last *Review*. We are moving toward solidifying plans for Symposium 2008 (see page 4), and have secured nearly \$40,000 in sponsorship thus far. These funds underwrite the expenses for the conference so that registration fees can



remain reasonable for our nonprofit partners.

Our one-day workshops are also well under way. We just finished the third of 22 workshops that will be running this season. Our facilitators have received 100% positive evaluations thus far. Although they say it is impossible to please everyone, these folks have found a way!

Participation in North Park's undergraduate nonprofit program has grown 100% over last year. The students have a long list of activities for the year with hopes of moving even more of their peers to consider a nonprofit career.

I would like to thank those who have served as my roadmap during my first 8 months. The many discussions, brainstorming meetings and networking sessions have helped me map out a relevant direction for the Center for 2008.

I hope you will begin to see The Axelson Center as an extension of your organization. We are a resource that can help you move forward. If you have ideas about how we can better serve you, please feel free to e-mail me at progers@northpark.edu.

I look forward to our continued journey.

Pier C. Rogers, Ph.D.
Director, The Axelson Center

THE AXELSON INTERVIEW

From the Foundation Officer's Chair



Phillip Thomas is a senior program officer in the community development area with The Chicago Community Trust, which awards more than \$81 million in grants each year to thousands of area not-for-profit organizations.

What is the biggest challenge facing nonprofits today?

The increasingly competitive nature of accessing resources. The government money that was available for nonprofits is shrinking. At the same time, there is increased need – especially with the changes in population and demographics.



The challenge for nonprofits is to distinguish themselves. They can do this by clearly articulating their missions and highlighting how they are effective. Outcome data is particularly important.

What is the biggest challenge in creating an effective partnership between foundations and nonprofits?

The most effective partnership is one that is not strictly based on the foundation providing resources. It is a richer, multifaceted relationship where both parties give and receive. Nonprofits have

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an advantage over foundations in that they are on the ground floor – they know what the community needs are. They are a great source of information for foundations. Many organizations don't take advantage of the fact that foundations need that sort of intelligence. Organizations should find a way to interact with foundation officers more regularly – and make sure that every communication is not an “ask.” This increases the nonprofit's access to foundation personnel and strengthens its ability to secure future funding.

What is the most common mistake nonprofits make when dealing with foundations?

Foundations are not a monolith. They are more like snowflakes – each is unique. A common mistake is that nonprofits don't do their homework to ascertain

**THE AXELSON CENTER
FOR NONPROFIT MANAGEMENT**

at North Park University in Chicago

how a foundation is unique and how the organization's mission fits within the foundation's mission. You shouldn't submit things that are too boilerplate. Your chances increase if you are able to craft something specifically for the funder that addresses their priorities.

What is the most common mistake foundations make when dealing with nonprofits?

I think foundations can be a little too risk adverse in their evaluation of nonprofits. The foundation processes are inherently conservative – they tend to stick with the tried and true. Foundations could improve in the area of innovation and look at groups that fall off their radar screens. For example, a nonprofit may not fit a preconceived notion of how a service should be delivered, but they are effective and doing good work. It also may require being a little more liberal in how capacity is judged.

What are your thoughts about general operating grants?

The general operating versus project specific support seems to run in cycles – the pendulum might be swinging back with a greater appreciation for general operating. There is definitely greater appreciation for how difficult it is for nonprofits to secure general support. It really is a matter of trust. If you are able to develop a relationship with a foundation so that they trust that you will stick to your mission, general operating support is a viable option.

How should a nonprofit decide whether to request project or general operating support?

General operating support is most appropriate when the mission and programs of a nonprofit organization are coterminous with the mission and objectives of the funder. When any part of the nonprofit could conflict with the funder's mission, project specific support needs to be considered. A foundation cannot expend money on projects that are explicable restricted in their guidelines.

What are the guidelines for writing a winning grant?

It is as much art as it is science – it is about developing a style that works for you. You need both a great project and great communications about that project. When you have one, you might be able to get funding. It's when you have both that you have a bull's-eye. Grant makers sell projects to their boards – we are the middle people. This is what a great grant can do – make our job of selling easier.

In the end, it comes down to what is in the foundation's budget, what is in the hopper, and how often the group has been funded. It also depends on what the board's priorities are for this cycle. Decisions are never made in a vacuum. It is hard to get out of foundations why a project didn't get funded, but sometimes it is about private deliberations of the board that can't be

divulged because it wouldn't necessarily make sense out of context.

The best method is to call the program officer before you submit the grant to find out the intangibles in any given cycle – otherwise, you are operating blind.

Looking down the road, do you see a change in the way that nonprofits and foundations interact?

I do see an increased emphasis on capacity building for nonprofits – particularly non-grant oriented assistance such as the provision of technical support through consultants. There is a desire from funders to help organizations through their organization's life cycle – especially nonprofits that are inline with the funder's priorities. Foundations are looking for ways to have a lasting impact. We are looking for ways to be strategic in our support. ■

IN THE COMMUNITY

Walking the Walk

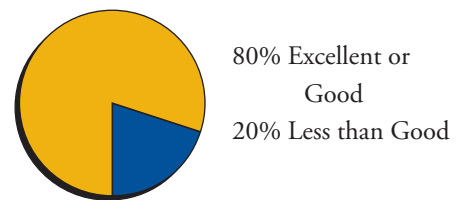
Gandhi once said, "I walk the walk." A powerful message for all leaders, it translates into an important lesson for nonprofit professionals: never stray from the mission. As competition for limited resources grows, it is crucial to continually demonstrate what steps we are taking to achieve our mission. In this spirit, The Axelson Center is proud to present a glimpse of its 2007 Annual Report.

AXELSON CENTER OVERVIEW
(JULY 1, 2006 – JUNE 30, 2007)

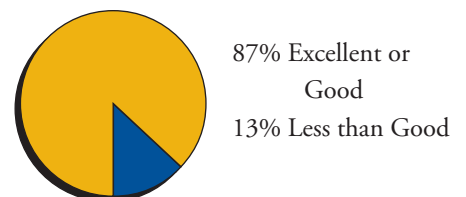
- Symposium Attendees: 382
- Alford-Axelson Awards (includes \$5,000 grant): 2
- New Executive Director BootCamp Attendees: 26
- Workshop Attendees: 227
- Number of Workshops: 16
- Greater Chicago Nonprofit Gateway Members: 665
- Students Enrolled in Nonprofit Graduate or Undergraduate Programs: 189

PROGRAM EVALUATION HIGHLIGHTS

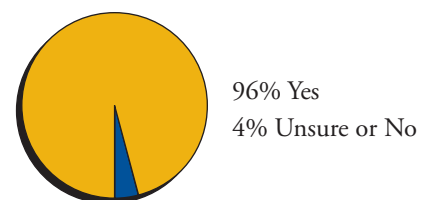
Symposium 2007 – Did We Meet Your Expectations?



BootCamp 2007 – Was the subject matter adequately covered?



2006/2007 Workshops – Were you glad you attended the workshop?



IN THE TOOLBOX

Your Case for Support: Useless Until It's Used



Doug Diefenbach, vice president of campaign planning and communications at Advocate Charitable Foundation, has over 30 years of experience in developing effective and provocative nonprofit communications.

You've heard that a well-crafted case statement is essential for any organization that raises funds. Many experts provide helpful "how-to's" on researching and writing these documents, which serve as seminal pieces for guiding communications and motivating volunteers. But even the most beautifully written case statement is useless until it's used. Research and writing are important, but it's the roll-out that's key.

That may seem intuitive at face value, but consider the implications. If it is to have value, your case statement cannot be corralled in the development office – it's about your organization as a whole, and must be adopted wholesale. That means it's vital that you help your organization's leaders translate this vision off the written page and put it into practice in a wide variety of organizational areas:

Volunteer training:

Ownership of the case message is vital. Begin at the top, involving board members in multiple in-depth discussions about the case and its implications for the future. In these discussions, your chief executive has a tricky role: his or her buy-in must be evident yet restrained. Remember, people support what

they help create; a proselytizing president can short-circuit the honest push-and-pull discussion that it takes to build ownership. Eventually, the case should become part of the orientation for all new employees and volunteers, ensuring that the message endures and percolates outward.

Fundraising and sponsorship: Messages connect when they are reinforced from multiple directions. Whether or not your case is to support an imminent campaign, think through all the communications your donors receive. How can your case perspective be appropriately incorporated into all of them? Might this new formulation of our message be attractive to previously unreachable donor prospects? One professional development organization I worked with in the past had minimal philanthropic history but, through a well developed case statement, was able to articulate a new, more socially relevant view of itself. It gained the confidence to win an unprecedented, multi-year grant from a major local foundation.

External relations: The impact of your case need not be limited to donors; ideally the positioning should inform external messages

to all audiences. That means involving your marketing and program colleagues in both developing and rolling out the case. Be creative and enterprising in considering the channels for your message. If you have a major public event, of course the case message should be woven into the emcee's remarks. But don't stop there: let all your speakers know about how this event fits into your organization's mission. Often, echoes of your message will find its way into their presentations.

Program and organizational

development: Generally, case statements are written in response to a new strategic vision for the organization. However, it can also work in the reverse. A compelling case can loosen calcified approaches and even influence structural change. Try this: at your board's next strategic planning retreat, ask leaders to explore how the organization could more fully implement the vision embodied in your new case statement. Give them free rein to imagine what it would take. New, energizing ideas are bound to arise. At a minimum, such an exercise forces leaders to think through – and own – all the implications of your case.

Remember the Three R's of Case

Statements: Research your case through conversations with lots of people – everyone from leadership to new constituents. Follow that up with inspired writing – let yourself go and capture your organization's vision in heroic, poetic fashion. But also carefully plan the all-important roll-out. Because a case statement is useless until it gets used.

For tips about how to write a compelling case statement, visit the Greater Chicago Nonprofit Gateway at <http://gateway.northpark.edu/>. ■

ASK THE EXPERT

Giving Goes Where the Relationship Flows

*In this interview, **Marshall Howard**, author of the critically acclaimed learning novel “Let’s Have Lunch Together” and 24-year relationship fundraising coach, shows how the power of relationships can double event income and turn your board into a team of fundraising champions.*



How do you define a relationship?

I believe a relationship is an emotional connection between two people that creates trust and makes people feel safe. It is not about friendship, it’s about partnership.

Creating a trust-building experience with someone is not magic, luck or accidental. Being a great relationship-builder is a learned skill, like swimming or riding a bicycle – it’s a repeatable, measurable process that produces dramatic results.

What is relationship-fundraising?

Moving important people to your mission up the relationship ladder...not chasing their money. It’s harnessing the key development ingredient – emotionally connecting with people, building trust and creating a safe zone.

Try this...before and shortly after your next event, meet one-on-one with sponsors

and key participants. Don’t wait. Get to know them as a person first. Share some things about yourself beyond your job...the ages of your kids, where you grew up, favorite hobbies, etc. This opens the door to great conversations now and in the future. Do NOT make an “ask.”

meet for coffee, breakfast, lunch, or even afternoon tea. Have a relaxing conversation that will connect you.

Do I need to be outgoing to use relationship-fundraising?

Not at all. Some of the shyest people I know are great relationship-builders. It’s a science and an art. Nonprofits can learn how to better execute the relationship-building fundamentals – that’s the science. Individuals can learn how to connect with others in their own special way – that’s the art.

What is the single most important relationship-building ingredient?

I wish I could say there’s just one – for me it’s about liking people and being curious about whom they are. That naturally leads me to ask them questions and share things about myself. I also add a good dose of vulnerability.

For others I have identified six additional ingredients that anyone can comfortably fit into their work style and life to build long lasting relationships and productive partnerships.

I will send you the list. Call me at (818) 340-9202 or email mhoward@marshallhoward.com. ■

How well does relationship-fundraising work?

Over the last 24 years, I have received thousands of examples from staff and board members of their successes. Recently, a development director told me that she increased her golf event by over \$125,000 in 11 months simply by applying our model. A grant seeker in Seattle called me to share his excitement about how a relationship-building visit to a Portland foundation increased their grant from \$25,000 to over \$165,000.

How much time does it take to get these results?

Start by simply investing 20 minutes a day into your relationship-building time bank. At the end of one week, you’ll have invested 100 minutes to spend delivering high impact touches with people critical to your mission. Make phone calls to catch up,

YOUR FEEDBACK

The Axelson Review is published quarterly by The Axelson Center for Nonprofit Management at North Park University, which serves the educational needs of nonprofit professionals through graduate degrees and certificate programs, on-site trainings, and an annual symposium series that addresses the contemporary issues and challenges confronting nonprofit organizations. For comments or feedback regarding the content of The Axelson Review, please email cbeall@northpark.edu.

THE NINTH ANNUAL AXELSON CENTER SYMPOSIUM
FOR NONPROFIT PROFESSIONALS ~ MAY 13-14, 2008



THE POWER OF CONNECTIONS

Creating Links That Count for Nonprofit Organizations

Link by link, we each represent a key connection in the intricate network that we call community. Understanding and harnessing the power of this interconnectivity is vital to building strong, resilient organizations. Symposium 2008 will focus on the art of developing powerful connections – the high-value and personal links that strengthen individuals, organizations and the collective community.

Keynote Speaker – Andrea Nierenberg

Join the master of relationship building and author of three innovative books including the top-selling *Nonstop Networking: How To Improve Your Life, Luck and Career*.

Register by April 2, 2008, for the early bird rate and save \$50! Visit www.northpark.edu/axelson or call (773) 244-5799 for more information.

THE AXELSON CENTER
FOR NONPROFIT MANAGEMENT

2008 SPONSORS



The Axelson Center 2007/2008 Workshops

January 10	Why and How to Communicate Effectively Online
January 24	The Call to Stewardship: Financial Management for Churches
January 30	So You Want to become a “Nonprofiteer”
February 7	Building and Leveraging Your Brand
February 13	Miracle Major Gifts
February 21	Human Resource Issues for Small Nonprofits
February 26	Succession Planning: What You Need to Know to Plan for Transition
March 6	Moving Beyond Tokenism: Making Board Diversity a Positive and Productive Experience
March 12	Effectively Manage Risk: A Guide for Nonprofit Leaders
March 19	Planning and Managing Organizational Change
March 26	How to Spend Fundraising Dollars Wisely: Budgeting and Allocating Resources
April 3	Servant Leadership
April 8	Influencing Political Change
April 16	Start Your Own Consulting Business

Registration information, instructor bios and further details can be found at www.northpark.edu/axelson.

Spring semester of graduate courses in nonprofit management begins January 14.

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