





WILD WOMAN FUNDRAISING

Your Nonprofit Leadership Career Path

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You Rock- So How Do You Move On Up?

They say we have a nonprofit leadership shortage.

I say they're not grooming us for leadership.

They say the boomers have no one to hand their jobs off to.

I say they can't afford to retire.

They say that the sector is shedding talented workers, who are going to government and for profits.

This is actually true. *But it doesn't have to be this way.*

We can change our culture, one nonprofit at a time.

You are ready to move on up. Otherwise you wouldn't be here.

What can I say? **You Rock. And you know it.**

So, how can we convince the world that you rock?

Easy. Just follow the steps in this workbook.

Whether you're a first time nonprofit worker or a seasoned nonprofit fundraiser looking to move up to be executive director or chief development officer, you'll find something here to help you discover your next fabulous opportunity.

You see, it's a two way interview process, and the questions and practices inside this workbook will help you discover if this place is WORTHY OF YOUR INCREDIBLE TALENT, not just any shelter in a storm.

Ideally, you're looking for a job while you're still employed, but even if you're getting unemployment right now, there's still time. Use this time to volunteer, and do as many nonprofit events and informational interviews as you can. You'll read exactly how to do these interviews in this book.

I'm so proud of you for being brave enough to step up, step out and say YES I want to rise! Let's grow together and make our sector better.

Who am I, and why do I care about you?

I'm Mazarine Treyz. I've worked for over 10 years in the nonprofit sector, in fundraising, and now, as a trusted advisor to nonprofit leaders who want to grow.

- I moved on up from Development Intern to Development Assistant, to Development Associate, to Development Officer to Development Director. I know what it takes to move on up.
- I also organized two career fairs in 2008 and 2009, a nonprofit job club from 2010 to 2011, and three career conferences from 2015 to the present.
- I wrote a 5 star rated book called *Get the Job! Your Fundraising Career Empowerment Guide* in 2013.
- Over the last five years I've been overjoyed to see my hard work paying off, as over 1,000 people have come to my conference, hundreds have attended my workshops on resumes, cover letters, moving on up and salary negotiation, and hundreds of people have attended my webinars on careers, building trust, addressing workplace bullying, and more.

By now you should know that **you are my kind of people**. I want to watch you succeed. Because right now, we are the lowest paid sector in the US. Call me crazy, but I believe we shouldn't be punished for wanting to make the world a better place with low wages and precarious work.

I believe wholeheartedly in the work of the Ontario Nonprofit Network, to create Decent Work environments for our nonprofit staff, and make improving the world begin at home.

Thank you for joining me on this journey.

I am here for you. Just email me at info@wildwomanfundraising.com or

call 503-673-3863 for a chat.

I'd love to see you move on up.

Let's rise, together!



Mazarine Treyz

Author, *Get the Job! Your Fundraising Career Empowerment Guide*, Founder, The Fundraising Career Conference

How to use this workbook

First fundraising job?

1. Read the list of qualities that are required for different kinds of fundraising jobs
2. Fill in your previous jobs /volunteer experiences
3. Tie your previous jobs/ volunteer experiences to the qualities for the job you want.
4. Make a list of nonprofits you're curious about
5. Find the person who has the kind of job you're interested in at this nonprofit. See if you can attend their events and do some sleuthing. Then contact them to follow up.

Moving on up in nonprofit work?

1. Fill out your previous jobs
2. Make a list of nonprofit leadership jobs you're curious about.
3. Look at the titles people have before they hold the title you want.
4. Use the career pathing model from Phil Gerard of Gerard Consulting to figure out what skills/ experiences you need to get that next dream job.
5. Discover your strengths in nonprofit work.
6. Make a list of your values. Which nonprofits match those values?
7. Make a list of nonprofits you're curious about.
8. Find someone currently working at these nonprofits in a leadership role. If you don't already know someone in common, then sleuth their event, then contact the them to follow up.

Kinds of Fundraising and Leadership Jobs

Here are some general things you will be responsible for in specialized roles. Many roles these days combine all of these things into one job.

Grants AKA Foundation and government fundraising

When you tell someone that you're a fundraiser, this is often what they think of first. "Oh, you get grants?" they say. Sometimes when people first discover fundraising, they think they need to be grantwriting consultants. And they don't know that getting grants often depends more on the relationships you've built up with the grantmakers than your writing skills. And that if you're working for a new nonprofit, you are almost certain to fail in getting any grants for them in the first year. It takes a long time to build up a relationship with funders.

You need to have these skills:

- *Research:* You need to know where to look for grants, and how to sniff out opportunities for corporate grants and government contracting.
- *Ability to interview* program staff and ask good questions to gain a deep understanding of the programs
- *Good storytelling ability and writing ability:* Grantors are people too, and they love to read a good story. A friend of mine worked at a foundation where every 6 months, the entire staff would gather to read the grant report from one of their grantees, because it was so riveting.
- *Ability to build and sustain relationships* with grantmakers by consistently communicating your results. This means reporting, calling, and acknowledging their gift in your e-newsletter communications too.
- *A high level of attention to detail:* Because grant applications can be extremely complex and they will disqualify you for getting even one thing wrong, you need to triple-check your application before you send it.

Direct marketing/individual giving

This can also be known as annual giving, face-to-face, door-to-door, telemarketing, online and direct mail, or appeal mailings,

To be successful at direct mail, you need to recruit, acquire, retain and develop donors from one-off givers to monthly or major donors through a variety of tactics. Writing appeal

letters, for example, takes these skills:

- *Survey skills:* Knowing what motivates your target audience of donors will allow you to write directly to their concerns. Using the phone to ask good questions will help your appeals be even more compelling. It will also help you anticipate and answer objections that might arise in the reader's mind as you ask them for gifts.
- *Data-literacy:* Once you have data about your donors, you need to make sense of it. What is important to your donors, and what will your letter be about? Will you create two different letters to speak to different audience segments?
- *Storytelling:* An appeal letter writer needs to learn how to tell a good story. This means easy on the stats, long on the visceral experience of the protagonist. The letter should make the reader feel like this problem is simple, solvable, and they have the chance to change someone's life. For good examples of storytelling in an appeal letter, check out <http://sofii.org>.
- *Graphic design:* You don't have to be a genius graphic designer but you do need to know what makes an effective, readable letter.
- *Mailing Logistics:* This means printing the letters and envelopes, stuffing, stamping, and sorting them, and taking them to the post office, weighing the letters, boxing, putting them in a cardboard sleeve, strapping them and paying. Often small shop fundraisers give this task to a mailhouse because the sheer amount of time this process takes.

Corporate fundraising

This used to be just about getting sponsorships for yearly events, but now it's about creating cause marketing partnerships, employee volunteering opportunities, and long-term thematic branding platforms.

Corporate fundraising can include;

- *Payroll giving*, a.k.a. when employees donate a portion of their paycheck to your nonprofit every month
- *Employee volunteering*, where employees are paid for the time they volunteer for you, and you are paid for them volunteering with you as well, and
- *Sponsorship*, getting sponsorships from corporations for your nonprofit events. For good advice about getting sponsorships, check out <http://www.sponsorship.com>.

What skills are helpful with Corporate fundraising?

- *Research:* To find out who your potential sponsors and vendors are
- *Relationship building skills:* Getting people to start to care about your cause, building your case for sponsorship, cause marketing, and longer term partnerships with corporations
- *Entrepreneurial business development skills:* Imagining new ways to make money with events and cause marketing ideas

Events fundraising

I remember doing The Walk for Hunger for Project Bread in Boston, with thousands of other people, when I was 12 years old. This is often our first exposure to fundraising, when we do a walk or run event with our church or other social group.

Event fundraising can include;

- Team athletic events (like walks, runs, or other a-thons)
- Galas
- Lectures and dinners
- Auctions
- House parties
- Annual meetings
- Career fairs
- Fashion shows
- Conferences

Here are some essential skills for event fundraising:

- *High level of attention to logistics:* Logistics for events means that each detail, like the date, venue, licenses, pipe and drape, banner, postcards, ticketing, online registration, etc. has to be hammered out weeks or even months before the event to make sure everything goes well on the day of the event.
- *Research:* To make significant amounts of money with an event, you need to be able to find sponsors, partners, and cause marketing collaborations that make sense.
- *Relationship building:* Ability to create and build relationships with sponsors and vendors, as well as key volunteers and attendees.
- *PR and Marketing:* You need to be able to get the word out about your event not just to your supporters, but to your larger community, to get them excited and interested in your event. This requires a lot of planning, budgeting, graphic design

and mailing logistics, as well as relationships with local media.

Major donor fundraising

This is also known as major gifts or principal gifts. Usually executive directors or chief development officers perform these duties or supervise board members in these responsibilities.

You need to know how to do prospect research, which means searching through your own database as well as others, to find people who are capable of giving a significant or leadership gift for your charity, and who might have an interest in your cause. Once you've identified your prospects, you need to find a connection, a person you know who knows them, then figure out how to approach them. Although there are complicated software packages you can buy for this purpose, to start with, a chart on the wall works just as well to track your prospects from the identification phase to the donation phase. This is known as moves management.

Skills you'll need for major gifts:

- *Enthusiasm for your cause:* If you're a major gifts fundraiser, you need to love your cause, and have a personal connection to it. If you work for a faith-based nonprofit, that faith needs to be part of your value system. If you work for a university, they tend to hire their alumni to convince major donors to give based on their shared experiences at the school. This is known as experience marketing. For more information on how universities do this, check out the book *The Experience Economy*, by Pine and Gilmore.
- *Research skills:* Your research skills will come in handy as you research your prospects, and help your major gift solicitors get up to speed on what the donor cares about, and how to connect this to giving to your cause.
- *Strong relationship-building skills:* This includes emotional IQ, or E.Q., being able to read faces quickly, asking lots of good questions, being able shift from an emotional conversation to one about values, the past, the future, and back again.

Legacy fundraising

This is also known as Planned Giving or Estate Planning. This is when a fundraiser builds a relationship with a donor to help them leave “the most thoughtful gift,” a gift to a charity in their will. How do you get them to leave a bequest gift in their will?

You have to get to know the donor, as well as their lawyers, will executors, their family, probate offices and co-beneficiaries. Legacy fundraising generally doesn't pay off until about 10 or 20 years after you solicit the gift. Since most fundraising professionals stay at their jobs 12-18 months, they are not encouraged to think this long term. However, if you

decide to make this kind of fundraising your specialty, I encourage you to get involved with a larger nonprofit, like a university or a hospital, to get a clear understanding of how this process works. If you have a background in financial services or a law degree, this would be a good career to look into. A background working with an estate lawyer can also be helpful.

You need these skills:

- *Listening and Patience:* An excellent book called “How to Say It to Seniors” talks about how to listen to older people and ask the right questions in order to build relationships.
- *Fluency with bequest structures:* You need to know and track the laws in your region. What does the law dictate? For more information, check out Christina Attard's blog, <http://christinaattard.com>. She knows a lot about gift planning.
- *Marketing:* To get people to leave you a gift in their will, you need to market the opportunity to leave you a gift. It can be through your website, a mailing, brochure, postcard, as an insert or advertisement in another publication.

(Excerpted from *Get the Job! Your Fundraising Career Empowerment Guide*)
<http://wildwomanfundraising.com/shop>

Executive Director

Chief Development Officer

See job descriptions on Simone Joyaux's resource website

Fundraising & Leadership Job Titles

General (for smaller nonprofits)

- Development Director
- Development Officer
- Development Manager
- Development Associate
- Development Assistant
- CEO
- Executive Director

More Specialized (for larger nonprofits)

- Grants Manager
- Foundation Giving Manager
- Corporate Giving Officer
- Major Gift Officer
- Prospect Researcher
- Planned Giving Manager
- Database Coordinator
- Event Coordinator
- Annual Giving Manager
- Individual Giving Coordinator
- Donor Relationship Manager
- Communications/Online giving Manager
- Chief Development Officer
- Chief Executive Officer
- Senior Director of Fundraising
- Vice President of Development

Most specialized (generally for universities, hospitals and large nonprofits)

- Development Specialist, Gift and Estate Planning
- Executive Director, Corporate and Foundation Relations

- Senior Development Researcher, Research Services
- Associate Vice President for Development and Campaign Director
- Development Specialist, Constituent and Volunteer Relations
- Executive Director, Endowment Services and Compliance
- Associate Director of Development, Principal Gifts
- Acknowledgment Coordinator, Constituent and Volunteer Relations
- Analytics Fundraising Scientist, Development Information Services
- Director of Development, Strategic Projects
- Biographical Senior Systems Analyst, Development Technology Resources
- University President
- Vice President of Donor Relations

I am interested in:

For first time fundraisers:

How do you show them that they should take a chance on you?

Example Meaningful Results for Fundraising Positions (From the for-profit world)

1. Successfully built relationships with buyers resulting in...(everything from introductions to large sales to referrals)
2. Increased the company's visibility with speaking engagements, interviews, participating in professional meetings, TV, Newspaper, Radio, etc
3. Set up business plans where you've achieved goals or gone over goals
4. Created systems for every aspect of marketing and sales
5. Help improve the customer retention rate (ideally you have percentages)
6. Trained volunteers/staff/board to market or sell or build relationships
7. Created and Delivered publications on time and under budget
8. Streamlined a process resulting in money saved.
9. Gone over sales/marketing goal

Add your own!

1. _____
2. _____
3. _____
4. _____

My Previous Jobs/Volunteer Experiences

1. _____ Job title

Duties

Results?

2. _____ Job title

Duties

Results?

3. _____ Job title

Duties

Results?

4. _____ Job title

Duties

Results?

Combining Trends, Needs, Skills

Fundraising Industry Trends → Nonprofit's Needs → Your Skills/Interests

Now think, how can I combine what I have done with

1. What the nonprofit industry trends are:

Leadership Trends

- Lack of leadership at high levels
- Lack of fundraiser management
- A lack of clarity between leadership and management
- Boards not being trained to govern, misunderstanding their roles
- Perceived lack of resources to pay for training or offer a higher wage
- Lack of understanding in how constant fundraiser turnover hurts us
- Lack of understanding around how to best utilize each person and their areas of strength.

Fundraising Trends

- Greater competition for donor funds
- Donor compassion fatigue (from too many bad appeals)
- Smaller gifts from smaller group of people
- Unsure of how to engage younger generation in giving
- Unsure of how to use the internet to raise money

Look up trends in the Chronicle of Philanthropy, Nonprofit Quarterly, The Agitator, etc.

2. What a specific nonprofit's potential needs are

- Has money from the yearly event gone down?
- Has grant money gone down?
- Has there been a lot of turnover at the top?
- Have their overall fundraising numbers gone down?
- Were they in the red last year?

How to find this information? Look up their most recent 990s at GuideStar.org or their financials at Canadian Revenue Agency.

3. How you can solve those needs with your current skills or interests

- Have you cut costs?
- Have you turned things around somewhere else?
- Have you raised money? How much? How did it compare to the previous year?
- Are you customer-centric? Can you turn this into donor-centric communications?
- Have you managed a team? How many people were on the team? How did you deal with different skill levels and varying levels of enthusiasm for the tasks?
- Are you a good speaker? How could you be the face of this nonprofit in the community? Would you be able to train a speakers bureau to go out and help others learn about your work face to face?
- What are your best skills and how would you use them in this job?
- Do you have stories illustrating your skills or values and the results when you're allowed to shine?

Discover your Nonprofit Leadership Strengths

Step one: You definitely want to take a look at the Strengthsfinder test online. Taking this test is a small investment that will pay off as you discover your strengths.

Step two: Once you have your 5 strengths, based on 30 years of research of millions of people, then you are equipped to discover more about how to apply them in nonprofit work and leadership. An excellent book on applying your strengths is *Go Put Your Strengths to Work* by Marcus Buckingham. If you would like more personalized career assistance around discovering your strengths, tailoring your resume and cover letter, and getting through the interview and salary negotiation process, [go here](#).

My 5 Strengths Are:

How I feel these translate to fundraising work and nonprofit leadership:

Fundraising tasks I can't wait to learn more about and do

3 fundraising achievements I've had

Fundraising tasks I absolutely can't stand

Leadership achievements I've had

Leadership or Management tasks I cannot stand

My Values

Remember, a virtue is a value in action. In order for you to discover how you best apply yourself at work, you need to look at your values, and figure out which ones are the most important to you.

Here's a Values checklist.

Which ones are the most important to you?

Which ones do you see other people acting out?

- Authenticity
- Balance
- Commitment
- Compassion
- Concern for others
- Courage
- Creativity
- Empathy
- Excellence
- Fairness
- Faith
- Family
- Freedom
- Friendship
- Generosity
- Genuineness
- Happiness
- Harmony
- Health
- Honesty
- Humor

- Integrity
- Kindness
- Knowledge
- Loyalty
- Openness
- Perseverance
- Respect for others
- Responsibility
- Security
- Serenity
- Service to others

My Top 10 Values (based on my actions)

- 1.) _____
- 2.) _____
- 3.) _____
- 4.) _____
- 5.) _____
- 6.) _____
- 7.) _____
- 8.) _____
- 9.) _____
- 10.) _____

Now from this list, **pick your top 3.**

How do my values play out in my work?

Value 1: _____

I show this value when I

Value 2: _____

I show this value when I

Value 3: _____

I show this value when I

Does this give you a better idea of which nonprofits you'd like to work for, or which jobs you'd be best suited for? I hope so! If not, let's keep going and see what arises for you.

Career Pathing Model

By Phil Gerard, Fundraising Recruiter

Sample Path

Development Associate

Education:

- Associate or Bachelor of Arts
- Diploma
- Fundraising Essentials Course

Experience:

- Some work and volunteer experience in fundraising
- Administrative experience

to Development Coordinator

Education: Fundraising Essentials course

Experience:

- Previous fundraising experience
- Events experience
- coordination experience
- Writing experience

to Development Officer

Education:

- Add fundraising certificate program
- Join AFP

- Continue professional development through seminars, conferences and specific workshops

Experience:

- Ask for opportunities to solicit face-to-face gifts, even in a supporting role
- Find a mentor (i.e. to go on calls with)

to **Development Manager**

Education:

- Continue professional development through seminars, conferences and specific workshops
- Focus on management training

Experience:

- Gain hands-on experience on all aspects of major gifts
- Build your face-to-face experience and track-record in soliciting gifts
- Ask for opportunities to mentor, supervise

to **Development Director**

Education:

- Continue professional development through seminars, conferences and specific workshops
- Add formal management training

Experience:

- Get hand-on experience supervising a growing team
- Continue to increase your experience in all aspects of major gifts
- Increase the gift level gradually from 5 to 6 to 7-figures

For people currently in the field

My Nonprofit Career Path

Job 1: _____

Timeline from _____ to _____

What do I need to do?

Skills

Experience

Job 2: _____

Timeline from _____ to _____

What do I need to do?

Skills

Experience

Job 3: _____

Timeline from _____ to _____

What do I need to do?

Skills

Experience

Ask Yourself

How many years will it take?

What skills do I need to add?

What experience am I lacking?

How to position myself well?

Who to talk to/connect with?

Volunteer opportunities (boards)

How to position yourself: Accomplishment Examples

What have you accomplished in previous positions?

- Successfully built relationships with donors resulting in...(everything from introductions to foundation grants to planned gifts to major gifts to monthly donations)
- Increased the nonprofit's visibility with speaking engagements, interviews, participating in professional meetings, TV, Newspaper, Radio, etc
- Set up fundraising plans where you've achieved goals or gone over goals
- Created fundraising systems for every aspect of fundraising
- Researched donorcentricity to help improve the donor retention rate (ideally you have percentages)
- Trained volunteers/staff/board to fundraise
- Created and Delivered annual report on time and under budget
- Streamlined the grants application process or gone over fundraising goal with grants
- Streamlined the annual appeal process
- Gone over fundraising goal with appeals-raised more than ever before-\$15K-\$30K (for example)

Add your own!

1. _____

2. _____

3. _____

You are the secret sleuth

Before you decide that you want a specific kind of nonprofit job, or to work at a specific place, you need to ask yourself, 1. Are they good enough for me?

And 2. Where am I going?

3. What will this role lead me to?

Have you researched how others have risen from these roles into other roles?

Then 4. Who do you want to interview?

If it's a nonprofit leader, is there a way for you to meet them at a networking event before calling them for an informational interview?

Maybe you, like Columbo, could ask lots of questions, and get answers.

Are you aware of the nonprofit events going on in your town? Is one of your nonprofits having an event coming up soon? When is it? Where is it? Is it something you can manage to get to in the next month or two? What if you could go to that event and be a secret shopper? What would you discover?

When you're there, can you look at everything closely? Can you look at the staff, and talk with them, and ask them what they think of the mission or their jobs? Can you see how well the event is put together? What would you do differently?

Why would you do this? To simply see who works there, how well they like their work, what the culture looks like, and if you would fit in there. Could you see these people being your work friends? Is the event autographed with excellence, or is it something you cannot stand? Pay attention to how you feel. This will tell you if this nonprofit is worth your time or not.

Nonprofit Detective Time!

1. _____

Website: _____

Nonprofit Event _____

When _____ Where _____

Person I'd like to ask for advice that works there

Their phone number or email

2. _____

Website: _____

Nonprofit Event _____

Person I'd like to ask for advice that works there

Their phone number or email

3. _____

Website: _____

Nonprofit Event _____

Person I'd like to ask for advice that works there

Their phone number or email

4. _____

Website: _____

Nonprofit Event _____

Person I'd like to ask for advice that works there

Their phone number or email

5. _____

Website: _____

Nonprofit Event _____

Person I'd like to ask for advice that works there

Their phone number or email

NOTES

Things to ask in your research interview

1. What nonprofits do you predict will do well or poorly over the next five years?
2. How do you see your nonprofit as a place to work?
3. How did you get started?
4. What type of background is typical of a successful leader (or fundraiser) in your nonprofit?
5. What are the four most important skills that someone in this position should have?
6. Would my background be appropriate?
7. Will this type of work be in demand in the future?
8. Where do these jobs typically lead?
9. What are two or three biggest issues that you'll be facing in the next year?
10. What type of skills will it take to address these issues?
11. What is the best approach to be considered as a serious candidate for fundraising positions?
12. How do you find talent when you're looking for it?
13. Which nonprofits have the highest likelihood of needing someone with my background?

Creating a job from the informational interview (for your favorite nonprofits)

1. What are the two biggest time sinks for you in the next couple of months?

It sounds like you have your hands full with that. (Wait for them to respond)

2. I've dealt with something similar, tell me about what you've done so far.

3. Share a story about what you did.

4. Would you like me to get together some ideas for how you could meet these deadlines?

Conversation Notes

Ideas: Ask them about previous fundraising roles and how they got into this role. Ask for their advice about getting into the field.

Meeting with: _____

Meeting with: _____

Conversation Notes

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Meeting with: _____

Meeting with: _____

Conversation Notes

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Meeting with: _____

Meeting with: _____

Resources

Need to find jobs?

Check out <http://charityvillage.com> for Canada

<http://simplyhired.com> for the US

Need to talk with a recruiter?

Phil Gerard, based in Vancouver, BC

<http://philscareers.com>

Need to step into leadership?

Check out the online [Fundraising Career Conference](#) in April and [The Nonprofit Leadership Summit](#) in September.

Need help learning hands-on how-to aspects of fundraising?

Look at <http://wildwomanfundraising.com/shop>

Need more fundraising career support?

Check out *Get the Job! Your Fundraising Career Empowerment Guide*.

<http://wildwomanfundraising.com/shop>

Need hands on advice to take it to the next level?

If you would like more personalized assistance around discovering your strengths, tailoring your resume and cover letter, and getting through the interview and salary negotiation process, [go here](#).