B ooks needn’t be voluminous to be good, as this crisply written, useful book affirms. Its foundation is that successful organizations operate at three levels: philosophical, strategic, and tactical. Grace demonstrates how these levels work together to drive an organization. She moves from the broader scope—philosophical—to the specific—tactical—but, as the title indicates, focuses on the strategic. An organization’s philosophy is reflected in its strategies and tactics, she points out. Without a philosophy, an organization founders, or, at best, jumps from project to project.

To Grace, “beyond fundraising” means development (building a constituency of support) and stewardship. She shows how to establish a stewardship plan, create a mission statement, and use both to pinpoint your organization’s values and guide your work.

Insightful as her message is, she could have strengthened it by choosing her terminology more carefully and clarifying her points more fully. For example, she overlooks an important distinction between values identification for donors and for the organization. She states that values identification comes after the first gift and inspires future gifts. What she doesn’t make clear is that, while this is true for the organization, it’s not true for the donor. In truth, values identification for donors comes before the first gift; that’s why they support the organization. Values identification comes after the first gift and inspires future gifts. What she doesn’t make clear is that, while this is true for the organization, it’s not true for the donor. In truth, values identification for donors comes before the first gift; that’s why they support the organization.

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By not exploring this distinction, Grace misses a key point, because if the organization fails to follow through, it may lose potential support. Moreover—and perhaps even more regrettable—it may deprive contributors of the most...
valuable thing it has to offer them—the opportunity to live their values.

Also troubling is Grace’s use of the term “donor-investor” throughout the book. While this moniker has the advantage of stressing the dynamic relationship between giver and nonprofit, it has unfortunate implications. The word “investor” has strong financial connotations and suggests an expected return to the investor. Donors sometimes receive a tangible return but not always, and they certainly shouldn’t expect financial dividends. A better word is “contributor,” which indicates participation in an organization without the expectation of monetary payback.

Despite these problems, the book delivers a powerful message to fundraisers, making clear the need to build relationships with contributors. Grace is cogent in describing how developing relationships intensifies connection and concern. The share of wealth contributors will give increases as their connection to the organization grows, she explains. The return they seek is the knowledge that the nonprofit will act upon their values. This premise has the potential to shatter the myths that keep nonprofits in a supplicant posture. Knowing what motivates donors goes a long way toward feeling comfortable about raising funds.

Grace outlines a 10-step process for donor development which includes creating plans, soliciting, follow-through, stewardship, and renewal. She emphasizes informing all employees, including volunteers, what development is, why it is beneficial to the organization, and how they can help.

To keep themselves on course while gathering support, organizations need pragmatism and passion. Leadership should reflect both. Inspiring and filled with helpful guidelines, this book provides the tools to do so.

Terrence Fernsler is associate director of development for the Mason General Hospital Foundation in Shelton, Washington, and president of the Development Training Institute (P.O. Box 15, 311 W. Martin, Elma, Washington 98541).
Q: Your team raised more than $23,000 in the 2017 GlobalGiving Year-End Campaign! Share your No. 1 tip for fellow year-end fundraisers. A: Figure out the primary message you want to pass on to your donors and readers.

Q: After your year-end campaign ended, how did you communicate with your new donors in order to ensure you could create new, long-lasting relationships? A: Immediate thank you letters in response to each donation, followed by regular reports and news, proves to be the most useful means of retention for our team. [Get nine simple tips for writing donor thank you communications.] Join Enjoyable Aging on GlobalGiving and get one-on-one crowdfunding training in the GlobalGiving Accelerator program! APPLY NOW.

Funding development requires more than just staff. It’s no different than an accountant without pencil, paper and calculator, or a doctor without a stethoscope. Ensuring adequate resources for development is an important step on the path towards a culture of philanthropy.

1. Board members and executive directors abdicating development responsibility. That applies to fundraising. Development directors are not magical, they cannot spin gold from straw. Board members and executive directors (probably the former more than the latter) must understand that it may take 18-24 months before a development director will be turning a profit. That is not to say you can’t hold them accountable, but choose metrics thoughtfully.