EASTERN SHORE food COALITION

Harry R. Hughes CENTER FOR AGRO-ECOLOGY

Resource Development (Fundraising) for Nonprofits

Rob Levit, Licensed Consultant, Standards for Excellence® Institute
Contact: rlevit@comcast.net, 410-279-3809

Feeding Our Futures, Moving Forward Together

Eastern Shore Food Security Symposium

March 20, 2026

Chesapeake College

ROB LEVIT
LEADERSHIP DEVELOPMENT AND STRATEGY

NO KID HUNGRY®

Mid-Shore Community Foundation

Types of Resources (Capital) Organizational Audit – Rob Levit

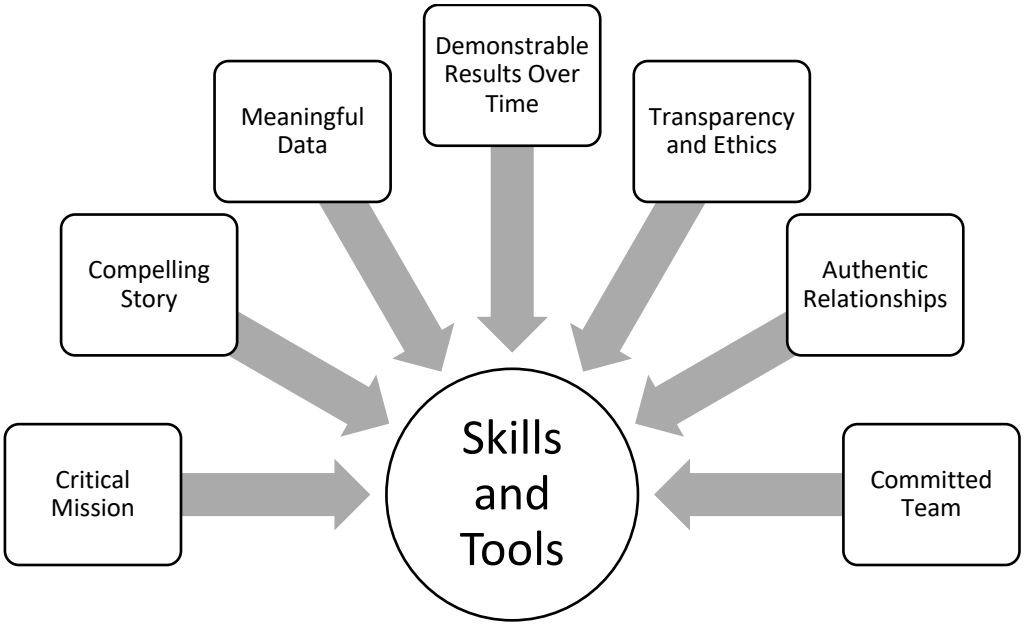
Financial	People	Talent
Creative	Knowledge	Network

Financial	The money an organization has available to operate, including funding from grants, donations, program revenue, earned revenue, and reserves. This covers both day-to-day operating costs and investment in growth and innovation.
People	The size and stability of the workforce, board, and volunteer base – having enough hands-on deck to deliver on the mission.
Talent	The specialized/unique skills, personalities, communication styles, diversity, expertise, and experience within your organization. From a skill perspective, talent includes things like program expertise, fundraising ability, leadership skills, and professional knowledge that make the organization effective.
Knowledge	What the organization collectively knows and has learned – methods, data, research, documented best practices, and lessons from past work – the intellectual property that makes programs effective *and* internally reproducible but externally difficult to reproduce.
Network	The relationships and partnerships the organization has built with other nonprofits, entrepreneurs, businesses, government, communities and community members. Strong networks open doors to resources, creativity, innovation, collaboration, and collective impact.
Platform	Your ability to reach, influence, and mobilize an audience. This includes social media platforms, linkage, and following, media connections, email list, brand recognition, and capacity to advocate for change and get people to listen and buy-in to the organization's mission.

Type of Resource/Capital	**<u>Step 1</u>** Rate 1-5 5 = Optimal 1= Severely Underperforming	**<u>Step 2</u>** Reason for rating – Best practices, "trade secrets, "fundamentals, symptoms *and* root causes	**<u>Step 3</u>** Areas of opportunity, growth, and reinforcement and strategies
Financial			
People			
Talent			
Knowledge			
Network			
Platform			

Fundraising From Mission Model – Rob Levit

Inspired by the work of: Kim Klein, *Reliable Fundraising in Unreliable Times* and others



Basic Principles of Fundraising from Mission

1. The greatest fundraising asset a nonprofit has is its mission.
2. Fundraising efforts centered on the delivery, demonstration and communication of the mission provide the longest-term and most sustainable results.
3. There is an opportunity cost and a time value of money cost to choosing one form of fundraising over another or choosing too many forms of fundraising.
4. Skills and tools without a critical mission, compelling story, meaningful data, demonstrable results, transparency and ethics, authentic relationships and a committed team can be damaging to the nonprofit ecosystem.
5. Fundraising from mission requires patience, perspective and planning. Because fundraising from mission is a long-term process, it is not uncommon for nonprofits to get stuck in a cycle of endless short-term funding strategies that require an inordinate amount of time, energy and resources (think fad diets vs. healthy lifestyle changes).

- ✓ **Directive A:** Understand your donors perspective – why, when and how they give.
- ✓ **Directive B:** Segment and track your donors by size, frequency and longevity/lifespan and analyze the data for key insights. (Source: Kim Klein)
- ✓ **Directive C:** Create a simple fundraising plan with attainable yet challenging goals that includes a case statement, current and prospective sources of funding, a communications/outreach plan and a synchronized calendar of essential activities to achieving the goals. *Keep it simple!*
- ✓ **Directive D:** Make critical asks in-person and use additional channels like social media, websites, email, phone, mail, etc. in accordance with their effectiveness.
- ✓ **Directive E:** Thank your donors and send targeted, scheduled, personalized updates and information without always directly asking them for a donation.

Elements of the Case Statement (From Fundraising for Social Change - Kim Klein)

Mission Why your group exists	
Goals What it will do about why it exists	
Objectives How it will accomplish the goals	
History Credibility, showing which objectives have been accomplished already	
Structure Who is involved, aligning the personnel with the goals	
Fundraising Plan That the organization has a number of appropriate income streams that will enable it to fulfill the mission	
Budget Benefits, rent and other costs are consistent with the mission and that the group knows how much it will cost to do the job it has set out to do	

Nonprofit "Mad Lib" and Overcoming Objections

Sample Language	Responses
My name is . . .	
And I serve as (title) . . .	
For . . . (cause), an organization I care deeply about.	
We are raising critical funds for . . . (specific request)	
To help . . . (solve a problem)	
In . . . (location)	
This will ensure . . . (aspiration)	
I'd like to ask . . . (specific $$ amount or other specific ask)	

The Full Ask

Possible Objections?
Thank you for mentioning that. That's a great question. Here's how we are approaching that.
Thank you for understanding some of our concerns. May I address that for you?
That's an important point you make. May I share the latest information?

Rob's Big 25 +1 "Fundraising from Mission" Principles

1. Be able to answer clearly, concisely and convincingly "Why should donors and organizations give to our nonprofit?"
2. Accomplishing nonprofit mission and running incredible programs are the greatest long-term fundraising strategy with the greatest return. They are visible and indisputable.
3. Make it easy for donors to give. A frustrated donor is one likely not to return but a happy donor most likely will.
4. Desperate appeals are not a long-term strategy. Nothing worse than a sinking ship (year after year) to make the crew abandon ship. Don't become a self-fulfilling prophecy. If your organization is struggling, it's probably not money that's the issue.
5. Dig new wells instead of complaining that the well has run dry or there are too many people at the same well. No one, especially donors, like a complainer.
6. Expend money on fancy fundraising tools and publications at your own risk.
7. There is a difference between "No" and a "Forever No." All "rejections" are opportunities for reflection and growth.
8. Chasing dollars from sources that aren't a good fit is . . . exhausting.
9. Behind all good data is a good story. Behind all good stories is good data. Have both.
10. Demonstrate donor and funder appreciation in a variety of ways and over a period of time.
11. Overreliance on one type of funding source or single funder is a recipe for disaster.
12. Asking for money is a noble cause and should be pursued with gusto . . . if your cause is worthy.
13. Don't make newsletters, letters and emails that - - - -! Who is your audience and how will the correspondence deepen your donors' and supporters' knowledge of your nonprofit?
14. Don't forget the "average" donor.
15. Understand and cultivate the best/most appropriate income streams to meet the needs and challenges of your organization.
16. An unethical dollar raised is a dollar your organization will regret accepting.
17. Raise what is needed today, tomorrow and for rainy days – not a dollar more, not a dollar less.
18. Ask donors, "Why do you give to our nonprofit organization?" and ask follow-up questions.
19. Do not lie on your 990 about overhead costs and do not lie to your donors either. Be radically transparent with your critical donors and funders to deepen relationships.
20. Segment your donors through – size, longevity, and frequency. (Kim Klein)
21. Anticipate funding "storms" on the horizon – changes in policy, demographics, personnel, boards, etc.
22. Beware of events (galas, 'thons, raffles, etc.) and examine the time, energy and resources needed for the target ROI. Are they "energy vampires" or "tank fillers?"
23. If you can't ask directly and confidently, you don't believe. "Feel the fear and do it anyway."
24. Some years donors and funders give, some years they don't. Accept it, don't resent it.
25. Simple gestures can create big results – being authentic and a thank you are still underrated!
26. Have fun, don't take fundraising too seriously – it's a process and a journey so be patient, cultivate, demonstrate value and play the "long game."

BBB Wise Giving Alliance | GuideStar | Charity Navigator

THE OVERHEAD MYTH

To the Donors of America:

We write to correct a misconception about what matters when deciding which charity to support.

The percent of charity expenses that go to administrative and fundraising costs—commonly referred to as "overhead"—is a poor measure of a charity's performance.

We ask you to pay attention to other factors of nonprofit performance: transparency, governance, leadership, and results. For years, each of our organizations has been working to increase the depth and breadth of the information we provide to donors in these areas so as to provide a much fuller picture of a charity's performance.

That is not to say that overhead has no role in ensuring charity accountability. At the extremes the overhead ratio can offer insight: it can be a valid data point for rooting out fraud and poor financial management. In most cases, however, focusing on overhead without considering other critical dimensions of a charity's financial and organizational performance does more damage than good.

In fact, many charities should spend more on overhead. Overhead costs include important investments charities make to improve their work: investments in training, planning, evaluation, and internal systems—as well as their efforts to raise money so they can operate their programs. These expenses allow a charity to sustain itself (the way a family has to pay the electric bill) or to improve itself (the way a family might invest in college tuition).

When we focus solely or predominantly on overhead, we can create what the *Stanford Social Innovation Review* has called "The Nonprofit Starvation Cycle." We starve charities of the freedom they need to best serve the people and communities they are trying to serve.

If you don't believe us—America's three leading sources of information about charities, each used by millions of donors every year—see the back of this letter for research from other experts including Indiana University, the Urban Institute, the Bridgespan Group, and others that proves the point.

So when you are making your charitable giving decisions, please consider the whole picture. The people and communities served by charities don't need low overhead, they need high performance.

Thank you,

Art Taylor
President & CEO,
BBB Wise Giving Alliance
overheadmyth.give.org

Jacob Harold
President & CEO,
GuideStar
overheadmyth.guidestar.org

Ken Berger
President & CEO,
Charity Navigator
www.charitynavigator.org/thebestandworstwaytopickacharity

Research shows that the overhead ratio is imprecise and inaccurate:

37%

37 percent of nonprofit organizations with private contributions of $50,000 or more reported no fundraising or special event costs on their 2000 Internal Revenue Service (IRS) Form 990

13%

Nearly 13 percent of operating public charities reported spending nothing for management and general expenses.

(The Nonprofit Overhead Cost Study)

75-85%

Further scrutiny found that 75 percent to 85 percent of these organizations were incorrectly reporting the costs associated with grants.

But still, Americans over-emphasize the number and prioritize it over demonstrated success:

62%

62% of all Americans believe the typical charity spends more than it should on overhead.

(Giving Evidence)

A 2001 survey found that OVER HALF OF ADULT AMERICANS FELT THAT NONPROFIT ORGANIZATIONS SHOULD HAVE OVERHEAD RATES OF 20 PERCENT OR LESS; NEARLY FOUR IN FIVE FELT THAT OVERHEAD SHOULD BE HELD AT LESS THAN 30 PERCENT. In fact, those surveyed ranked overhead ratio and financial transparency to be more important attributes in determining their willingness to give to an organization than the demonstrated success of the organization's programs. *(BBB Wise Giving Alliance)*

The "Overhead Myth" persists despite evidence that investments in overhead facilitate better nonprofit performance:

"ORGANIZATIONS THAT BUILD

robust infrastructure—which includes sturdy information technology systems, financial systems, skills training, fundraising processes, and other essential overhead—are more likely to succeed than those that do not."

(The Nonprofit Starvation Cycle)

2,000

2006 CompassPoint Nonprofit Services study of nearly 2,000 nonprofit executives in eight metropolitan areas reveals that receiving general operating support played a major role in reducing burnout and stress among executive directors.

(Daring to Lead 2006: A National Study of Nonprofit Executive Leadership)

11.5% VS 10.8%

In 2011, the charities which GiveWell reviewed and recommended had higher overhead than the charities they review and didn't recommend, 11.5 percent versus 10.8 percent.

(Giving Evidence)

Underinvesting in overhead creates a range of negative outcomes which undermine quality and sustainability:

Description of Underinvestment	Consequences
• Limited/no staff for administrative roles (e.g. finance, development, operations)	• Limited ability for organization to manage/monitor finance, development, etc.
• Limited investment in staff training and development	• Increased turnover among staff, particularly those looking for ongoing professional development • Limited ability to continually enhance skills of employees • Difficulty building senior team from within
• Inexperienced staff for administrative roles	• High turnover • Poor work quality
• Poor IT infrastructure	• System crashes, downtime • Loss of data/information, limited information sharing
• Poor donation management systems	• Inability to track donors and fundraising progress • Limited ability to target fundraising
• Poor performance management systems	• Limited ability to track beneficiary outcomes, particularly across sites • Limited ability to easily generate reports for grantmakers

Source: Mark A. Hager, Thomas Pollak, Kennard Wing, and Patrick M. Rooney, "Getting What We Pay For: Low Overhead Limits Nonprofit Effectiveness," Nonprofit Overhead Cost Project of the Center on Nonprofits and Philanthropy at the Urban Institute and the Center on Philanthropy at Indiana University, August 2004; case study interviews.

Primary Sources:

The Nonprofit Starvation Cycle
Stanford Social Innovation Review, Fall 2009

Getting What We Pay For: Low Overhead Limits Nonprofit Effectiveness
Center on Nonprofits and Philanthropy, Urban institute Center on Philanthropy, Indiana University

What We Know About Overhead Costs in the Nonprofit Sector
Center on Nonprofits and Philanthropy, Urban institute Center on Philanthropy, Indiana University

Nonprofit Overhead Costs: Breaking the Vicious Cycle of Misleading Reporting, Unrealistic Expectations, and Pressure to Conform
The Bridgespan Group, April 2008

Where'd My Money Go?
Americans Perceptions of the Financial Efficiency of Nonprofit Organizations
GreyMatter Research, 2008

Good Charities Spend More on Administration than Less Good Charities Spend
Giving Evidence, May 2013

Management and General Expenses: The Other Half of Overhead
The Nonprofit Quarterly, Spring 2003

The Worst Way to Judge a Charity
Los Angeles Times, April 2012

Ratio Discrimination in Charity Fundraising: The Inappropriate Use of Cost Ratios Has Harmful Side-Effects**
Voluntary Sector Review, March 2010 **Behind pay wall

The ten most important things you can know about fundraising

BY KIM KLEIN

Many times at the end of a training or a speech about fundraising techniques and principles, I am asked, "What are the most important things to remember?" Usually the person asking is either a volunteer with little time to help with fundraising, a person new to fundraising and overwhelmed by the number of details she or he has to keep in mind, or a staff person who is not responsible for fundraising but wants to help.

Over the years, I have thought about what I consider the ten most important things to know about fundraising. The items are not presented in order of importance, although #1 is probably the most important; nor are they in order of difficulty. If there is any order, it is the order in which I understood these things and integrated them into my own fundraising work. Undoubtedly, other skilled fundraisers would have slightly different lists, but this list has served me well for many years. I hope you find it useful.

1. IF YOU WANT MONEY, YOU HAVE TO ASK FOR IT

While there are some people (may their kind increase) who will simply send an organization money or offer money without being asked, there are not enough of them to build a donor base around. Most people will not think to give you money unless you make your needs known. This is not because they are cheap or self-centered; it is because most people have no idea how much it costs to run a nonprofit, or how nonprofits get money. If you don't ask them, they will simply assume you are getting the money somewhere. They have no reason to think your group needs money unless you tell them, the same way they have no reason to know if you are hungry, or unhappy, or needing advice.

Millard Fuller, who founded Habitat for Humanity, says, "I have tried raising money by asking for it, and by not asking for it. I always got more by asking for it."

2. THANK BEFORE YOU BANK

Once you receive money, you must thank the person who gave it to you. I have found that disciplining myself not to deposit checks until I have written the thank-you notes has forced me to make thank-you notes a priority. I am not rigid about this rule because if I get behind in my thank-you notes, and then don't deposit the checks for a while, the donors may wonder whether we really needed the money.

Thank-you notes do not need to be fancy and should not be long. If at all possible, they should include a personal note, even if it is from someone who doesn't know the donor. You can add something as simple as, "Hope to meet you sometime," or "Check out our website," or "Happy holidays," or even, "Thanks again — your gift really helps."

Many organizations have created note cards for staff and volunteers to use when writing thank yous. The front of the card has the logo of the group, on the top half of the inside is a relevant meaningful quote from a famous person, and the bottom half of the inside is used for the thank-you message. It is a small space, so you really can't say much.

Many databases will print out a thank-you note after you enter the information about the donor — saving valuable time. These are best if accompanied by a personal note at the bottom.

Late thank yous are better than no thank you at all, but photocopied form thank yous are almost the same as no thank you.

The long and the short of thank yous is: if you don't have time to thank donors, you don't have time to have donors.

3. DONORS ARE NOT ATMS

A survey of donors who gave away more than $5,000 a year asked, "What is your relationship with your favorite group?" Several gave similar answers, even though they did not know each other and did not give to the same

group. All the answers were on this theme: "I would love to be considered a friend, but I am more of an ATM. They come to me when they need money, they tell me how much, I give it to them, and the next time I hear from them is when they need more."

This is a terrible indictment of much of what passes as fundraising. When I have described this common situation in trainings, people have often asked, "How can we make sure our donors don't feel this way?" The answer is very simple, "Make sure you don't feel that way about your donors."

All groups have a few "high maintenance" donors, and may be forgiven for wishing them to go on a long trip to a place without phones or e-mail. But the majority of donors require practically no attention. They have the resilience of cacti — the slightest care makes them bloom. Thank-you notes, easy-to-understand newsletters, and occasional respectful requests for extra gifts will keep people giving year in and year out.

Think of your donors as ambassadors for your group. Design your materials so that donors will be proud to give your newsletter to a friend or recommend your group when their service club or professional association is looking for an interesting speaker, or forward your e-mails to several of their colleagues.

By treating your donors as whole people who have a number of gifts to offer your group, including their financial support, you will have more financial support from existing donors, more fun fundraising, more donors, and the peace of mind of knowing that you are not treating anyone as an object.

4. MOST MONEY COMES FROM PEOPLE, AND MOST OF THOSE PEOPLE ARE NOT RICH

There are three sources of funding for all the nonprofits in the United States: earned income (such as products and fees for service), government (public sector), and the private sector, which includes foundations, corporations and individuals. For the nearly 60 years that records about who gives money away have been kept, at least 80% of this money has been shown to be given by individuals.

In 2002, total giving by the private sector was almost $241 billion, and 84.2 percent of that ($202 billion) was given away by individuals! These people are *all* people — there is no significant difference in giving patterns by age, race, or gender. Income is not nearly the variable that one would think: middle-class, working-class and poor people are generous givers and account for a high percentage of the money given away. In fact, a study by Arthur Blocks of the Maxwell School of Citizenship and Public Affairs at Syracuse University showed that 19% of families living on welfare give away an average of $72 a year!

Too often, people think they can't raise money because they don't know any wealthy philanthropists. It is a great comfort to find that the people we know, whoever they are, are adequate to the task. Seven out of ten adults give away money. Focus your work on these givers, and help teach young people to become givers.

5. PEOPLE HAVE THE RIGHT TO SAY NO

One of the biggest mistakes I made early on as a fundraising trainer was not balancing my emphasis on the need to ask for money with the reality that people are going to say no. No one is obligated to support your group — no matter what you have done for them, no matter how wealthy they are, no matter how much they give to other groups, how close a friend they are of the director, or any other circumstance that makes it seem they would be a likely giver.

While it is possible to guilt-trip, trick, or manipulate someone into giving once, that will not work as a repeat strategy. People avoid people who make them feel bad, and they are attracted to people who make them feel good. When you can make someone feel all right about saying no, you keep the door open to a future yes, or to that person referring someone else to your group.

People say no for all kinds of reasons: they don't have extra money right now; they just gave to another group; the don't give at the door, over the phone, by mail; a serious crisis in their family is consuming all their emotional energy; they are in a bad mood. Rarely does their refusal have anything to do with you or your group. Sometimes people say no because they have other priorities, or they don't understand what your group does. Sometimes we hear no when the person is just saying, "I need more time to decide," or "I need more information," or "I have misunderstood something you said."

So, first be clear that the person is saying no, and not something else like, "Not now," or "I don't like special events." Once you are certain that the person has said no, accept it. Go on to your next prospect. If appropriate, write the person a letter and thank them for the attention they gave to your request. Then let it go. If you don't hear no several times a week, you are not asking enough people.

6. TO BE GOOD AT FUNDRAISING, CULTIVATE THREE TRAITS

A good fundraiser requires three character traits as much as any set of skills. These traits are first, a belief in the cause for which you are raising money and the ability to maintain that belief during defeats, tedious tasks, and financial insecurity; second, the ability to have high hopes and low expectations, allowing you to be often pleased but rarely disappointed; and third, faith in the basic goodness of people.

While fundraising is certainly a profession, people who will raise money for any kind of group are rarely effective. Fundraising is a means to an end, a way to promote a cause, a very necessary skill in achieving goals and fulfilling missions.

7. FUNDRAISING SHOULD NOT BE CONFUSED WITH FUND CHASING, FUND SQUEEZING, OR FUND HOARDING

Too often, organizations get confused about what fundraising is and is not.

If you hear that a foundation is now funding XYZ idea, and your organization has never done work in that area nor have you ever wished to do work in that area, the fact that you are well qualified to do such work is immaterial. To apply for a grant just because the money is available and not because the work will promote your mission is called fund chasing. Many groups chase money all over and, in doing so, move very far away from their mission.

Similarly, if your organization seems to be running into a deficit situation, cutting items out of the budget may be necessary but should not be confused with fundraising. When deficits loom, the fund squeezing question is, "How can we cut back on spending?"; the fundraising question is "Where can we get even more money?"

Finally, putting money aside for a rainy day, or taking money people have given you for annual operating and program work and being able to put some of it into a savings account is a good idea. Where savings becomes hoarding, however, is when no occasion seems important enough to warrant using the savings.

I know a number of groups that have cut whole staff positions and program areas rather than let money sitting in their savings be used to keep them going until more money could be raised. I know groups that overstate what they pay people, what price they pay for equipment, what they spend on rent, all to get bigger grants from foundations or larger gifts from individuals, and then put that extra into savings — savings that they have no plan for.

A group that saves money needs to have a rationale: Why are you saving this money? Under what circumstances would you spend it? Without some plan in mind, the group simply hoards money.

Fund chasing, fund squeezing, and fund hoarding need to be replaced with an ethic that directs the group to seek the money it needs, spend it wisely, and set some aside for cash-flow emergencies or future work.

8. FUNDRAISING IS AN EXCHANGE — PEOPLE PAY YOU TO DO WORK THEY CANNOT DO ALONE

Hank Rosso, founder of the Fund Raising School and my mentor for many years, spoke often about the need to eliminate the idea that fundraising was like begging. Begging is when you ask for something you do not deserve. If you are doing good work, then you deserve to raise the money to do it. What you must do is figure out how to articulate what you are doing so that the person hearing it, if they share your values, will want to exchange their money for your work. They will pay you to do work they cannot do alone.

9. PEOPLE'S ANXIETIES ABOUT FUNDRAISING STEM FROM THEIR ANXIETIES ABOUT MONEY

Anxiety about money is learned, and it can be unlearned. If you are ever around children, you know that they have no trouble asking for anything, especially money. In fact, if you say no to a child's request for money, they will simply ask again, or rephrase their request ("I'll only spend it on books"), or offer an alternative ("How about if I do the dishes, then will you give me the money?").

Everything we think and feel about money we have been taught. None of it is natural; none of it is genetic. In fact, in many countries around the world, people talk easily about money. They discuss what they earn, how much they paid for things, and it is not considered rude to ask others about salaries and costs.

We have been taught not to talk about money or to ask for it, except under very limited circumstances. Many of us are taught that money is a private affair. Having too little or too much can be a source of shame and embarrassment, yet money is also a source of status and power. Most people would like to have more money, yet most will also admit that money doesn't buy happiness.

As adults, we have the right — in fact, the obligation — to examine the ideas we were taught as children to ensure that they are accurate and that they promote values we want to live by as adults. Most of us have changed our thinking about sex and sexuality, about race, about age, illness and disability, about religion, about marriage, about how children should be raised, what foods are healthy, and much more. We have done this as we have learned more, as we have experienced more, or, as we have thought about what we value and what we do not. We need to take the time to do the same work with our attitudes toward money. We can choose attitudes that make sense and that promote our health and well-being.

Our attitudes toward fundraising are a subset of our larger attitudes toward money. The most important change we can make in our attitudes toward fundraising is to remember that success in fundraising is defined by how many people you ask rather than how much money you raise. This is because some people are going to say no, which has got to be all right with you. The more people you ask, the more yes answers you will eventually get.

Finally, if you are anxious about asking for money or would rather not ask, this is normal. But ask yourself if what you believe in is bigger than what you are anxious about. Keep focused on your commitment to the cause and that will propel you past your doubts, fears, and anxieties.

10. THERE ARE FOUR STEPS TO FUNDRAISING — PLAN, PLAN, PLAN, AND WORK YOUR PLAN

Though humorous, this formula that I learned from a community organizer underscores the fact that fundraising is three parts planning for one part doing. I learned this later in my career, after having gone off half-cocked into many fundraising campaigns and programs. I meant to plan, I planned to make a plan, I just never got around to planning.

I have learned (usually the hard way) that an hour of planning can save five hours of work, leaving much more time both to plan and to work. Planning also avoids that awful feeling of "How can I ever get everything done," and that sense of impending doom. It moves us out of crisis mentality and means that we are going to be a lot easier for our co-workers to get along with.

There are a lot of articles and books on planning — I recommend reading some of them. However, the easiest way I have found to plan something is to start by defining the end result you want and when you want it to happen, then work backwards from that point to the present. For example, if you want your organization to have 100 new members by the end of next year and you are going to use house parties as your primary acquisition strategy, you will need to schedule five to seven house parties that will recruit 10 to 15 members per party.

To set up one house party will require asking three people to host it (only one will accept), which will require identifying 15 or 20 possible hosts to carry out the number of house parties you want to have. The hosts will want to see materials and know what help they will have from you.

The materials will have to be ready before the first phone call is made to the first potential host, and the first phone call needs to occur at least two months before the first party. So, the materials need to be produced in the next two weeks, hosts identified in a similar timeframe, calls made over a period of two or three months, and so on.

When you are tempted to skip planning, or to postpone planning until you "have some time," or to fly by the seat of your pants, just remember the Buddhist saying, "We have so little time, we must proceed very slowly." GFJ

KIM KLEIN IS PUBLISHER OF THE *GRASSROOTS FUNDRAISING JOURNAL*.

About Rob Levit

Rob Levit is a gifted facilitator and consultant who has worked extensively with educational, corporate and nonprofit clients on strategic planning, team development and leadership skills. He is known for his inclusive, engaging and interactive style that fosters learning, collaboration and clarity for participants. Rob has provided keynotes, trainings and facilitations for a wide array of organizations including the Colorado Oil and Gas Conservation Commission, Exelon, Governor's Office for Children, Maryland Nonprofits, Anne Arundel County Public Schools, American Nurses Association, ASHRM, Talbot County Public Schools, Anne Arundel Medical Center, The World Bank, Maryland Fund for Excellence, Heim Lantz, The New Jersey Hospital Association, Leadership Development Institute, Northwestern Mutual, the TEACH Institute and Hospice of the Chesapeake among many others. Rob is a multi-award-winning nonprofit leader including the 2011 Martin Luther King Peacemaker Award, 2012 Mentor of the Year Award and a 2013 Innovator of the Year Award from The Maryland Daily Record as well as two Community Trustee awards from Leadership Anne Arundel. Rob is also a Licensed Consultant from Maryland Nonprofits' Standards for Excellence Institute®, a Certified Trainer in Workplace Conflict Resolution from the Mediation Institute at Eckerd College and holds an Executive Leadership Certificate from Cornell University.

Dr. Ursula McClymont, Vice President of Medical Affairs, Baltimore Medical System:

I have participated in many leadership seminars (i.e. Center for Creative Leadership, American College of Physicians, Partners in Leadership) over the past few years and found the training sessions facilitated by Mr. Levit to be more practical, informative and challenging. He challenges participants to evaluate themselves in an honest and transparent way. I was able to apply the concepts easily, in a manner that allowed me to measure my successes and failures. His style of teaching keeps you engaged. After four hours, there is no desire to leave because you are captivated. His sessions are thought provoking and challenges participants to be innovative.

Patricia Cully, Director, Parrot Labs Cyber Mission, KeyW Corporation:

It is my pleasure to recommend Rob Levit as a trainer and facilitator for your organization. Mr. Levit delivered a three day train-the-trainer course to a group of our instructors and kept the group focused and on track using engaging and interactive techniques that allowed for maximum collaboration and increased learning. The group consisted mostly of individuals with from technical fields and Rob was able to effectively teach them to use adult learning principles, Bloom's taxonomy, and presentation best practices to in practical and immediately applicable ways to improve training outcomes. The evaluations I received from the students indicated that Rob did an outstanding job and employees at my company have requested him for future trainings.

Jamie Heinmiller, Wellbeing Specialist, Anne Arundel Medical Center:

Rob Levit is an outstanding speaker. I've had the chance to be a part of two different presentations at our Health System. One session was for a leadership training group and the other session was for employee week. Both times, Rob engaged with the diverse teams by using practical examples to get the groups motivated, laughing, and primed with positive energy. Rob himself approaches the audience with energy, making them laugh out loud. The time flies by and never seems like it is long enough. Somehow, he finds a way to connect with everyone in the room. When I think of speakers that made an impact in my work, I think of Rob.