

# Do you HAVE to print this now?

Greetings, thanks for choosing this session!

I have a personal request for you.

Normally I don't provide my handouts before my session. I have done so because the PowerPoint screen isn't always easy to read. If you cannot see easily or if your learning style is to "follow along" then feel free to print the presentation.

I have modified it for easy printing.

To get the full impact though, please use this for reference *after* the session. ALL of my resources are in the other printable documents, not in the session.

Thanks for considering my request. See you at Fundraising Day 2009!

Sincerely,

**Paul Nazareth**

# Paul Nazareth

Manager, Planned Giving and Personal Gifts  
Catholic Archdiocese of Toronto

## **NETWORKING**

*Practical Benefits*

# The Basics: personal, professional & social Do's and Don'ts

## **10 Second Challenge**

Quantitative networking:

In your organization

For program progress, donors

Advisors & Peers

Secrets & Resources

# Your plan

- What are you trying to achieve:
  - Personal network/friendships
  - Professional achievement/employment
  - Donor/Client contact = gifts/business
  - Social interaction / value

**1. Ready**

**2. Shoot**

**3. Aim**

# Questions when making your plan

- Personal: Grooming, etiquette, comfort, social communication style
- Professional: Part of job, career, helping others, social/political goals
- Social: Optional, enjoy connecting, seeing others succeed

# Planting the Seed Vs. Picking Fruit

Reception Table

Prospect from list

Exciting stories

Peak curiosity

Promise something

Arrange meet

invite to event

Specific Gifts

Engage in planning

Follow up

# Do's

- Eat before
- Read news
- Research location
- Prepare promises
- Play host
- Tag team
- Connect others
- Brag about others

# Don'ts

- Scan the room while talking
- TOUCH your Blackberry
- Think about your reply
- Don't one-up stories
- Do you need the last word?
- STOP with the weather, sports, banter – make it meaningful, speak directly or move on

# **Planned Giving Power Program**

## **Quantitative networking:**



**Non - Move Moves**  
**Program Contact**  
**Personal Contact**  
**Follow up**  
**GIFT**

# In your organization

- You need to network – in house (must be nice)
- Teach your team, staff how to introduce you
  - Give them the why – let them figure the words
  - Do you have the confidence to empower? Get over ego.
  - Non fundraisers introduce you better. Get over ego.
  - Why are you the only one networking? Get over ego.
  - Put chatty Carl and Cathy to work!
  - **OTHERWISE** you'll get
    - You're a fundraiser, he's rich – you should talk!
    - Judy here is going to help you give us all your money when you die

# **Moves Management Vs. No Need Networking**

Rigid structure

Flexible

Tied to gifts

Tied to dream

Pressure

Natural

Interrogate

Curiosity

Agenda

Win-win

# Donor Work

- Events
- Annual contact
- Community

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- ✓ Registration – Plant the seed
  - ✓ Let it grow – Join for dinner
  - ✓ Make it happen – Promise something!
  - ✓ When the time comes – Ready to talk

# Cards Cards Cards

- For all reasons – blank, thank you, sympathy
- Company card?
- Keep your office stocked - always
- Survey results - download
- This is not 1981 – stop the “signature” card
- Before meetings – prepare to follow up
- Hand write addresses! Delegate if needed.
- Pictures – the ultimate insert

*SendOutCards.com VS. Vista Print.ca*

# Donor/Charity Advisors

- They are being engaged at a higher level by other charities for the first time in Canadian history
- Provide value, what's your edge – there are 100,000 other charities in Canada
- Respect their needs (client service), client relationship ( don't try to get around them ) & rules ( they can't refer you just as you can't refer them – directly )

# How to access peers

- **Associations!**
  - Association of Fundraising Professionals
  - Canadian Association of Gift Planners
  - Industry specific, Association of Healthcare Professionals
  - What if membership is free?
- **Attend education sessions**
  - Have your own plan for your annual PD priorities
  - Push yourself to stay ahead of trends
  - Cheapest PD / therapy is volunteerism
- **MAKE the calls**
  - Your favourite charity
  - Call peers ( bequests )
  - Do you share donors?

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# How to engage peers

- Have a list. Peer = gift / problem
- Share material / learning yourself
- Discussion/dialogue = greater learning
- Grow a list of advisors with specialties
- **Secret:** Fundraisers are donors...

# Diversity/ Culture

- Do you know
  - The culture of your sector?
  - The culture of your organization?
  - The cultures in your donor base?
  - The culture of your team?

# Diversity

## yesterday and today

- Yesterday
  - Diversity meant ethnicity or religion
  - We're still not "over" these issues
- Today
  - Diversity includes donor ageism
  - Silo protection!

# Secret 1:

## *Volunteering*

- Grow skills you can't cultivate at office
- Low risk – social / work environment
- Test ideas – you can't at work
- Management experience
- Peer to peer education – volunteering for CAGP/AFP
- Peer to peer counseling – fundraising is isolative
- Profile for job security – hiring and job hunting
- External and informal mentoring – other sectors
- *There's never been more spots open!*

***If you're an experienced fundraiser,  
consider mentoring as well.***

# Secret 2

## GP: Career / Hiring

	<u>Dating</u>	Vs.	<u>Job</u>
Daily:	18 hours		40 hours
Earning potential:	No impact		Direct impact
Moving in together?	Optional		Immediate
Weaknesses/Quirks	Cute		Ulcer

*Keep a list, grow prospects,  
let them win it if they want it!*

# Resources

- Books, books, books
- Comments on resources
- Online tools
- Tricks and tips document
- Results of survey

***Your greatest resources are peers!***

# The Shepa Brand

- Positive Networking®
- The science of human interaction
- Card use, design, distribution
- The words! Intro, get in, get out...
- The secrets of networking
- Format: Light, fables, nuggets, summary – if you have a life...
- Oh Canada!
- Being a professional woman

# **The Conference: NETWORKING OLYMPICS**

## **EVENT - MEAL - SOCIAL**

Prepare at home/office so you can focus.

Know your limits/style: **Be on your game.**

Have a plan, don't leave without gold.

**FOLLOW UP: Make the time!**

# Online

- Linked in profile
- Zoominfo profile
- Your own website?
- Your program links?
- **Go Google yourself!**

*Online networking is not applicable to a “specific” time sensitive plan.*

*Make sure it’s a good use of time.*

# What do they all have in common...

- Seek first to provide value
- Work backwards from your goal
- Cultivate awe, wonder, curiosity
- Know yourself, comfort zone  
& style before you start

**Goodbye, farewell..**

Networking is not a mysterious art,  
it's not a painful business necessity  
it's a wondrous way of life.

# Thank you for your time, call me any time.

Greetings, thanks for making the time and choosing my session. I have created a large network because I care about Canadian philanthropy and the fundraising profession specifically, gift planning. If you have questions, call me now – don't hesitate - too many people do. I was helped when I was starting out and am eager to repay the hours of kindness shown to me

I am in need of your help. I am a young man with a passion for this profession and a love of my young family. Can you help me be a better gift planner, a better parent ( I have no experience ), a better citizen of this country I love, this world I inhabit?

I appreciate any help you can provide.

**Paul C. Nazareth**

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