



# Fundraiser Focus

*Wear fewer hats and raise more money!*



# Today's speakers



Jessica Rechten  
Executive Director,  
Development and  
Operations



Claire Johnson  
National Director,  
Development Services



# Today's agenda

1. How do you spend your time?
2. Internal Fundraiser Role
3. Case Study
4. Elements of a Successful Partnership
5. Key Learnings



## VISION

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*Empowering recovery and  
well-being for all.*

## MISSION

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Harnessing **science, love** and the **wisdom** of **lived experience**, we are a force of healing and hope for individuals, families and communities affected by substance use and mental health conditions.



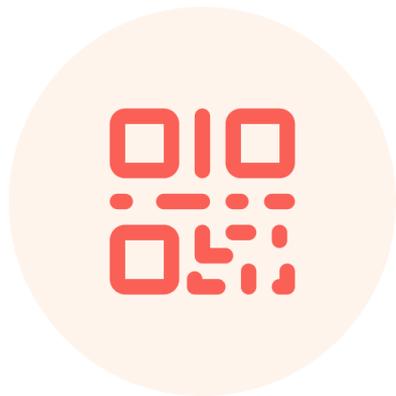
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What would you do if you had  
more time each week?



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#2111333**

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How many hours do you or a Gift Officer in your shop spend in meetings with donors or prospects each week?

ⓘ Start presenting to display the poll results on this slide.

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What do you do that keeps you from meeting with donors or prospects?

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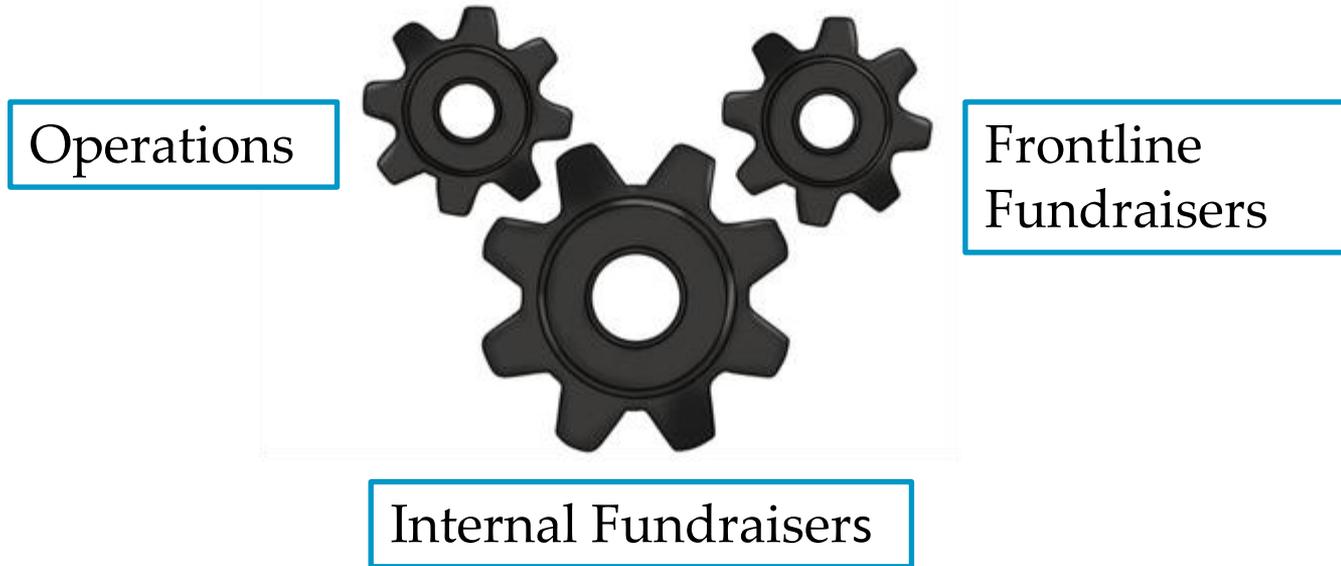
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How many hours per week do you spend on scheduling and logistics, gathering program information, creating deliverables, reviewing data, etc.?

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# Development Structure





# Fundraiser Attributes

## **External Fundraiser**

- Trends towards extroversion
- Active listening skills
- Talent for building relationships
- Connects the donor and org

## **Internal Fundraiser**

- Can balance many responsibilities
- Highly organized
- Metric focused
- Ability to prioritize and pivot
- Partner oriented
- Process expert



# Internal Fundraiser Role

- Acts as a strategy sounding board.
- Reviews and uses data and metrics to drive decision making and focus.
- Conducts daily huddles with frontline fundraisers and makes collaborative decisions regarding next actions.
- Interacts with other members of the Development team and external partners on behalf of the front line fundraiser.
- Serves as a knowledge expert for various programmatic pieces.



# Internal Fundraiser Role

- Manages the communications and deliverables needed for prospect and donor work. Ensures briefs, proposals ,and impact reports are strategic, personal and donor ready.
- Acts as an accountability partner and guides gift officers to stay aligned with the team's fundraising best practices and priorities.
- Coordinates and supports logistics for donor experiences, meetings with clinical staff, etc.
- Identifies trends and flags issues or challenges that are impacting the frontline team, and act as key driver for process improvement.

# Meet Kristian Nguyen, Development Services Officer

## **Primary Job Focus:**

Process expert

Improving momentum

Metric measurement



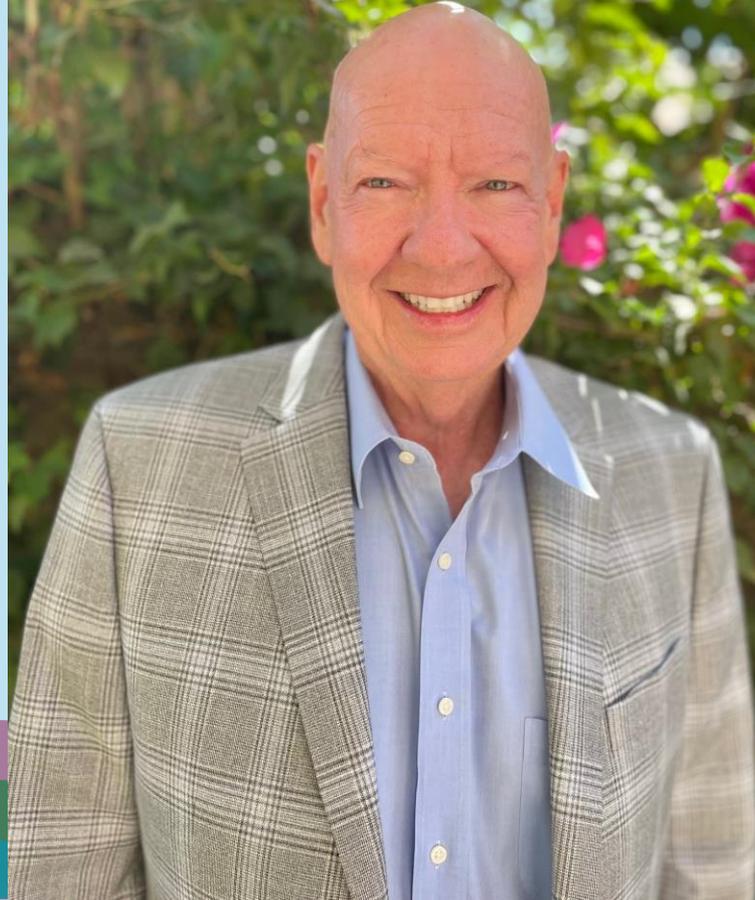
# Meet Greg Fisher, Principal Gift Officer

## **Primary Job Focus:**

Building relationships

Connecting passion to  
mission

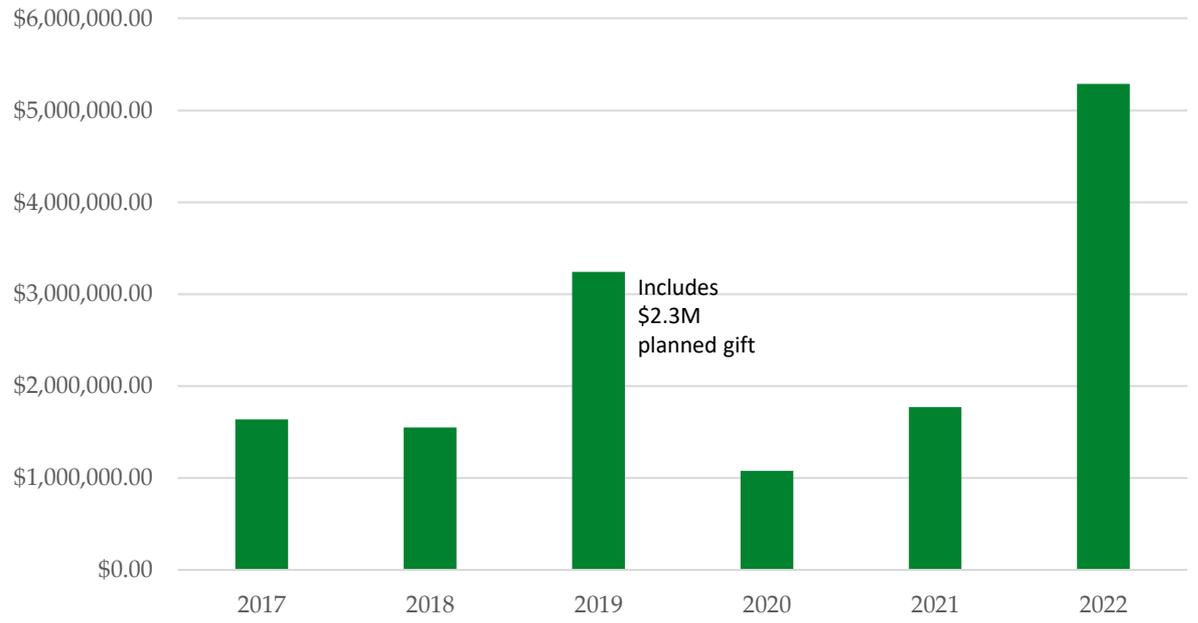
Strategy driver





# Greg's Annual Production

Total Raised by Year





# Essential Elements for Success

<b>TACTICAL</b>	<b>INTANGIBLE</b>
Shared Metrics	Trust
Timely Contact Reports	Communication
Daily Huddles	Synergy
Process Focus	Radical Candor



Continuous improvement is not about the things you do well-that's work. Continuous improvement is about removing the things that get in the way of your work. The headaches, the things that slow you down, that's what continuous improvement is all about." – Bruce Hamilton





# Key Learnings

- It is difficult for some fundraisers to let go
- Internal relationship building and developing trust takes time
- Not every partnership is the right fit
- Shared accountability is key
- Internal fundraisers have the best insights on identifying high level trends and areas for process improvement

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