

Let's Have Lunch Together

**A Learning Novel for Nonprofits by
MARSHALL HOWARD**

Directed by Arthur Bauer



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For information, please contact:

Marshall Howard & Associates

22148 Sherman Way, Suite 202

Canoga Park, CA 91303

Phone: 818-340-9202, Fax: 818-340-0353, E-mail:

mhoward@golfwst.com

or visit our website at www.marshallhoward.com



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Troubles Ahead

Finally, after eight years as Executive Director, Oscar now felt he had a real chance to move his organization to the next level. Without showing any emotions, he patiently awaited an important decision from a very influential major donor prospect. He had just finished a \$50,000 lead gift ask to one of the most successful business couples in town, Janice Worthington and her husband Ted. The future of his new family center was riding on that one word, "Yes." Without their financial commitment, it would be very difficult to raise the \$500,000 needed. They were his last and only hope!

Oscar could feel the tension build. Silence filled the Worthington's small, oak-paneled conference room. He was confident that they would say yes. After all, he had made an

excellent case for the family center.

The silence seemed to go on forever. There wasn't a single question from either one of them. It was nerve-wracking.

Perhaps this would be a good time to say a quick prayer, he thought to himself. The couple continued to examine the proposal, occasionally glancing up at Oscar.

How could they possibly turn down a golden opportunity like this? They could make a big impact. I've done everything by the book. We had a perfect introduction a few months ago through a long-time supporter. Our first meeting sparked their interest. They saw our mission in action, then asked me for specifics in writing. I wrote a very thorough proposal.

As the Worthingtons quietly discussed the project between themselves, Oscar began to feel increasingly optimistic. Had he noticed a couple of positive nods?

There they go again. Yup, that's definitely a nod, all right. There's another one.

He could hardly contain his excitement. He wanted to leap out of his chair and yell, "Yes! We've finally done it!"

Oscar couldn't take anymore of this drama. Thoughts raced through his mind about who would be the new program lead, where it would be housed, and how it would be introduced to the community.

Okay, folks, just say "yes" already!

He knew it would be impossible for Janice and Ted to turn down a project as important as this.

Oscar finally broke the silence. "What do you think?"

They slowly began to rise out of their chairs. Both had a smile on their face.

It was in the bag, he excitedly thought to himself.

"I can see you put a lot of work into this proposal, Oscar. The program is something that's definitely needed by many families in our city, but..."

Oh, no. This is definitely not the time for buts.

"...we'd like to think about it a little more," they continued.

He stood up and once again asked them, "Did the proposal give you a good overview? I hope it explains the urgent need for these services."

"You've done a great job," said Janice. "As I've said before, you've covered all the bases for us extremely well."

Oscar felt very proud.

"We just need a little more time to think about it."

There was a jolt of disappointment that shot through Oscar's body. "I understand," he said graciously, as they all walked toward the door. "Call me if there's anything else you need. I look forward to your support."

Although they didn't say yes, Oscar was still confident Janice and Ted would be the ones to take his organization to the next level. On his way out, he shook both their hands firmly as if to say, *I'm glad you are aboard.*

He pulled out of the parking lot, slipped his favorite CD into the player of his new Volvo, and gave out a long sigh

of relief. *Asking for \$50,000 is not something I'm accustomed to doing, nor is it one of the favorite parts of my job. I don't like to sell or be sold. But if I say so myself, I think it turned out darn good. All signs point to that wonderful three-letter word I like to hear: "Yes! Yes! Yes!"*

* * *

Plowing through morning traffic, he couldn't stop thinking about how the Worthingtons' contribution would be the one, bright, shining light in an otherwise lackluster fundraising year.

To continue that rare positive feeling, Oscar forced himself not to think about all of his organization's challenges: his ongoing, two-year struggle to build a more influential board; his perpetual battles to offset decreasing and more restrictive grants; and his never-ending uphill fight to increase annual campaign and special events revenue.

As Executive Director, he knew his fundraising world was changing, and changing very fast. *Perhaps with the help of folks like the Worthingtons, he thought, we'll now be able to establish an endowment and build our major gift and planned giving programs.* Oscar clearly understood that those were the yellow brick roads of fundraising—the hallmarks of a mature fund development program.

After running a few business errands, he returned to his office several hours later. He immediately noticed his

message light was rapidly blinking at him. *Maybe it's the Worthingtons?*

Without hesitation, he began to retrieve his calls. A voice said, "You have five new messages."

He listened to message one. It wasn't them. Then he scrolled through messages two and three. Again, not a word from the Worthingtons. Message four was his wife. She was calling to see if this would be one of those rare nights he'd be home in time for dinner.

As he began to listen to the last message, a troubled look came over his face. It was Bob Dailey, one of Oscar's great board catches. He listened intently as he heard Bob say, "Oscar, I'd like to meet with you as soon as possible. Is the day after tomorrow, Thursday, at your office, convenient for you?"

That was enough to break Oscar's major gift celebration party. Bob's tone of voice could only mean one thing: trouble with a capital T.

Bob was an influential banker and a community leader—someone most executive directors dreamed about having on their board. His commitment was vital to the organization's future. Problems with Bob could spell disaster for Oscar's long-term plans.

He immediately returned Bob's call and confirmed Thursday's meeting for 9:00 a.m. When Oscar tried to ask Bob why he wanted to meet, he would only say, "I've had some things on my mind and I want to talk to you about them."

Oscar slumped back in his chair. Although he was sometimes frustrated with his board, he just couldn't figure out why, all of a sudden, Bob wanted to meet with him. *Have I gone too far, he thought, trying to get board members more engaged in our fundraising efforts?*

There wasn't much he could do now about Bob's meeting except wait and worry until Thursday.

* * *

His anxiety-filled week wasn't quite over yet. There was more trouble ahead. He spent the rest of his day working on issues for next year's budget. The new family center was a big piece of it.

As the end of the day approached, there was a light knock on his door. It was Madeline Aguilar, his Director of Development.

"Hi, Oscar. Do you have a minute? There's something I want to talk to you about."

"Absolutely. Have a seat. I've been meaning to call you," he said. "I want to tell you all about the great meeting this morning with the Worthingtons. They thought it was an excellent proposal."

For over two-and-a-half years, Oscar could always depend on Madeline. They seemed to have the same workstyle.

Although we haven't had the best of fundraising years,

thought Oscar, *nobody works or tries harder than she does. She understands teamwork and the importance of follow-through. She's a very valuable member of our staff.*

From the moment they sat down, however, Oscar sensed there was something different about her today. She seemed troubled.

After Oscar finished highlighting the meeting with Janice and Ted Worthington, Madeline immediately chimed in. "It sounds like it was very productive, Oscar. I'm curious, what other organizations are they involved with? Do they have any kids? How old are they? Are they originally from here?"

"I'm not sure those were appropriate questions to ask them," he responded. "But I do know they liked the proposal. I'm confident we'll get their \$50,000 lead gift for the family center."

Madeline had an amazed look on her face. Instantly, Oscar had just confirmed why she needed to talk to him.

"What did you want to see me about?" Oscar asked tentatively.

Madeline began to shift in her chair and move some papers over to one side of the table. All of a sudden, he felt she was going to tell him something he did not want to hear. "This is not easy to discuss with you, Oscar..."

Instantly, that familiar knot in his stomach began to form. *Please don't say what I think you're going to say.*

"I believe 100% in our mission and the work we're

doing here, but I'm not sure Director of Development is the job for me. I'm not sure I'm cut out to be a fundraiser for a nonprofit. I've thought about going back to banking. I came in here to talk to you about resigning."

After what seemed to be hours of silence, Oscar leaned over, placed his elbows on the table, and said to Madeline in a calming tone, "Talk to me more about what's troubling you about your job."

"It's not that I don't think our work is important. It is. We're making a big difference," Madeline continued, "It's just that I feel very frustrated much of the time."

"How so?"

"I feel as if I'm continuously taking two steps forward and then three steps backwards. Each year, we run from event to event always struggling to find new supporters to make them a bit more profitable. There's got to be a better way to raise money."

Oscar was surprised Madeline was being so direct. He continued to listen.

"Oscar, I think things would improve if somehow we could get to know our donors better. I feel that most of them barely know us, nor we them. That makes it so much harder for us to increase our funding."

Oscar was upset. *We've always had good relationships with our supporters. Nothing has ever led me to believe otherwise,* he thought to himself. *Besides, our donor relationships are Madeline's responsibilities. She's the Director of Development.*

That's her job.

"Oscar, the Worthingtons are a good example of what I'm talking about. It seems to me we still don't know much about them, and they probably don't know enough about us. How can we realistically expect \$50,000 from people with whom we don't have a very strong relationship? That's a lot of money from almost strangers."

Oscar felt as if he had just been kicked in the stomach. "Believe me, Madeline, as Executive Director, I understand the importance of having strong donor relationships," he said emphatically. "It's something I'm continuously trying to build and improve upon."

Although he respected and liked Madeline, his patience was wearing thin. "If you've felt that there was a problem with our donor relationships, why, over all these years, haven't you done something about it?"

"I've tried. Every time we talk about our fundraising, you and the development committee just come up with yet another event or new idea of the year. We've never once discussed ways to grow stronger relationships with our donors. In the long run, that's what will help us raise even more money."

"I fully agree. Why don't you build those relationships on your own, like I try to do?"

"Oscar, I wish I had more time and the flexibility to do exactly that. I'm so busy writing proposals, handling community relations, and managing all of our fundraisers, I

barely have time for my own family. You've made it perfectly clear those are my priorities and responsibilities."

Although Oscar was irritated, he definitely wanted her to stay. "Madeline, look at all the great things you're doing here. Your work is helping so many families. Do you remember when Anita and her children came over to say thanks for the help?"

"How could I possibly forget? I had tears in my eyes."

"Those are the results we're accomplishing every day."

"But Oscar, don't you see, we could accomplish so much more if we somehow could focus on building stronger relationships. Each year, we keep looking for a panacea or a quick new fix. That's wearing me out."

He knew Madeline was right about relationships. It was *how* to build those relationships and *how* to turn them into great things that he could never quite figure out.

"I'm not trying to change your feelings about your work," Oscar continued, "nor am I trying to change your mind about leaving."

"I understand perfectly," said Madeline.

"Then do me a favor," he asked. "Do you think you could hold off on making a final decision for at least forty-five days?"

Before talking to Oscar, she already had made up her mind to leave. On the other hand, she also felt she owed him the extra time.

“Oscar, I told you the way I see it because I believe in the organization and our work. As Executive Director, I thought you needed to hear it. I’ll stay for another forty-five days, but I don’t think things will change.”

Oscar stood up and walked her to the door. “Relationships are critical to our success. I appreciate you telling me how you feel. Thanks for giving it another month or so.”

Oscar knew he had just dodged a bullet, barely. What he didn’t know was exactly what more he could possibly do to build those stronger donor relationships.

*“People say yes
To those they know best.”*