

PUTTING THE PIECES TOGETHER: FUNDRAISING, OUTREACH, AND STRATEGIC PLANNING

Sarah Oktay, PhD

Executive Director, Center for Coastal Studies

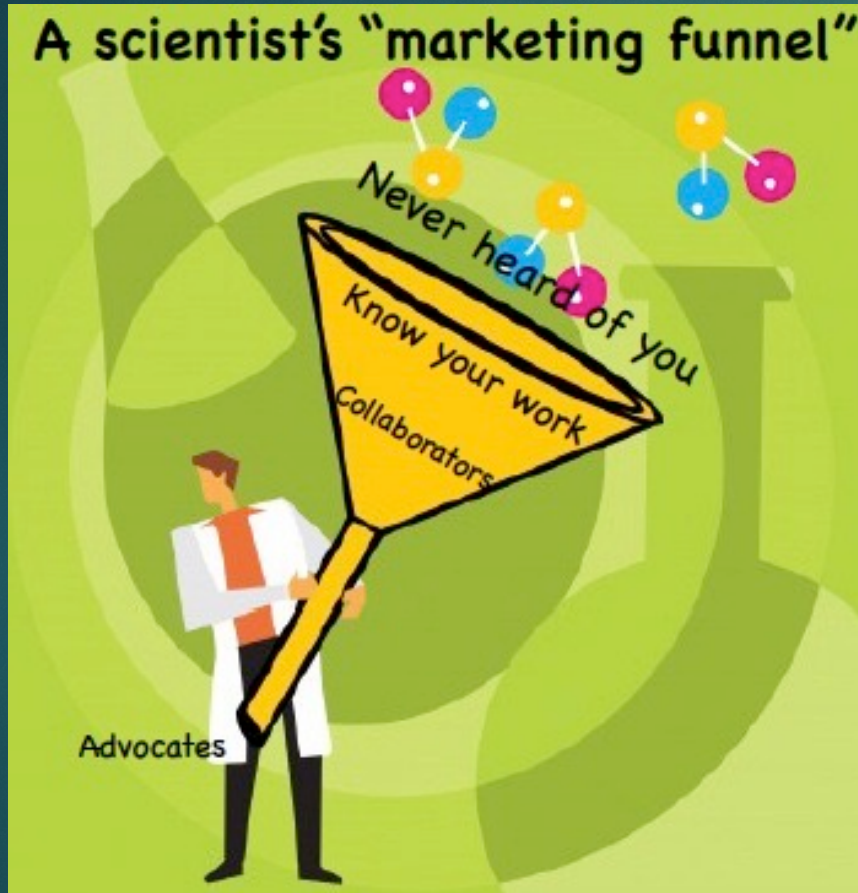




CONNECTIONS BETWEEN OUTREACH AND FUNDRAISING > STRATEGIC GOALS

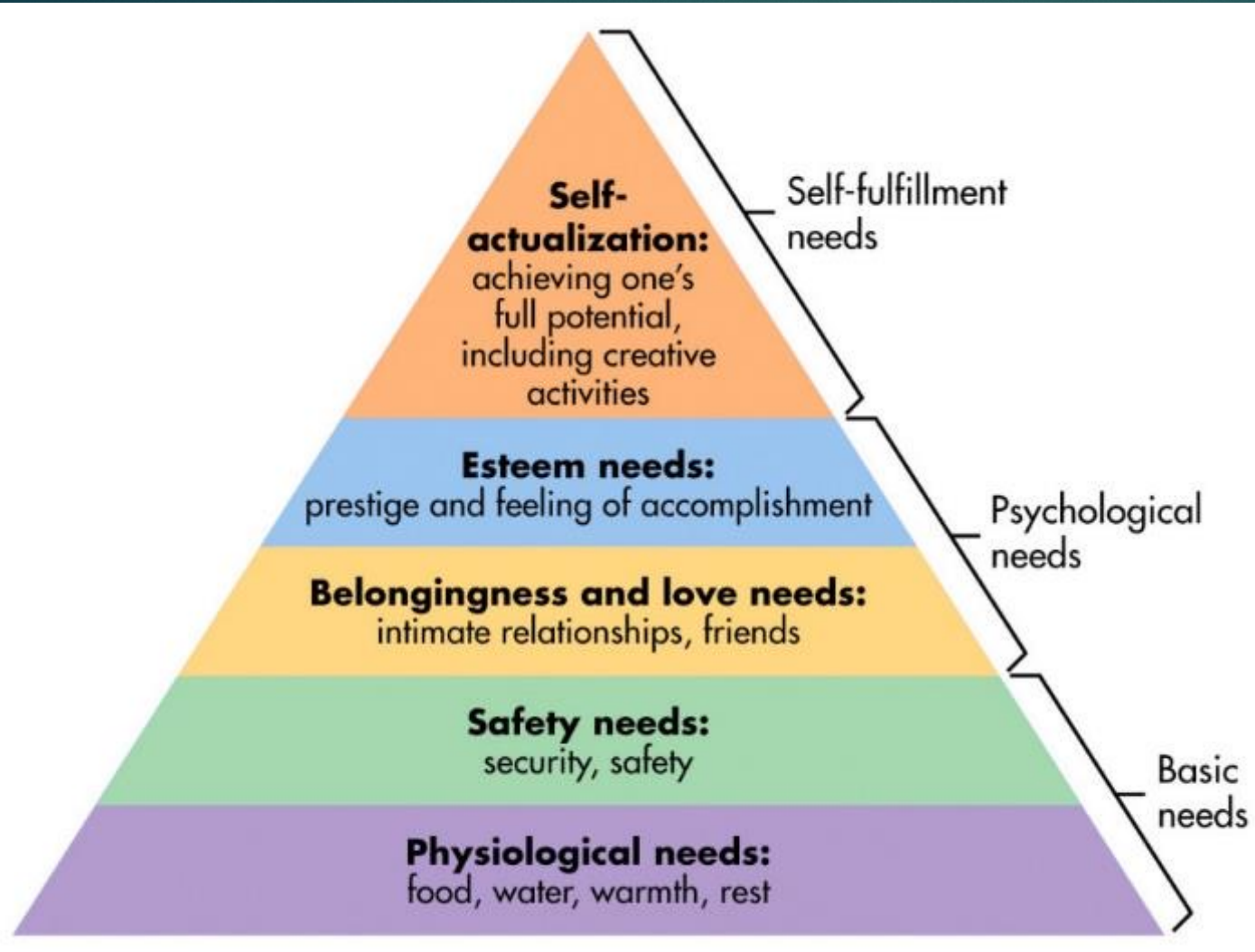
- Outreach and Communication: you must tell your story well to raise money and to communicate your strategic plans
- Along the way you need to establish “buy in”, the desire to see the mission of the organization succeed. This is true of all audiences (users, students, colleagues, governmental advocates, donors)
- Finally, you need to build a sense of belonging and family to ensure that the people working with and for you feel like part of a family

Why do we need to “Market” Science?



- ▶ Elicit support
- ▶ Help others
- ▶ Build interest/teach
- ▶ Fundraising
- ▶ Networking
- ▶ Public policy translation

Marketing for Scientists: how to Shine in Tough Times – Mars J. Kuchner, 2012 <https://www.amazon.com/Marketing-Scientists-Shine-Tough-Times/dp/1597269948>



Maslow's Hierarchy of Needs: Simple Psychology- but let's pretend Toolik is a person; because we often treat special places with that lens. Helps define motivation and meaning

Our strategy is to address our needs

Maslow's hierarchy of needs -

Part 2: Science is a luxury

- ▶ Air, water, food, shelter
- ▶ Safety and security of body, health, family, property
- ▶ Family, friendship, intimacy
- ▶ Self-esteem, confidence, achievement, respect
- ▶ Creativity, morality, learning, art, **science**

Because science is a luxury for people; you have to double down on your story telling abilities to make people care- the opposite of how we feel; the Sheldon Effect

Communication and the RULE of THREE

Omne Trium Perfectum “Sets of three are perfect and complete”
The *Rule of Three* capitalizes on the fact that our brains are hardwired to remember groupings of three.

Think through the 3 most important ideas for your audience to remember and build your content around those. After those 3 points, your hope of retention drastically declines.

When three parallel elements such as words or phrases come one after the other to communicate a message, they are called a tricolon. This type of Rule of Three is expressed in former US president Franklin D. Roosevelt's advice, “Be sincere, be brief, be seated.”

What makes a good science story?



- ▶ Novelty
- ▶ Passion
- ▶ Mystery
- ▶ Adventure
- ▶ Overturning Conventional Wisdom
- ▶ Conflict and Controversy
- ▶ Just Plain Cool

Herd of Muskox (Seth Beaudreault)

NONPROFIT MARKETING PLAN COMPONENTS

Overview of Organization

- Mission Statement
- Key Stakeholders
- Staff Structure
- Goals
- Priorities

Overview of Audience

- Current Audience
- Target Audience

Messaging and Communication

- Language and Tone
- Calls to Action
- Branding, Color, Logo, Font
- Tactics and Channels
- Marketing Calendar
- Reporting Methods

How do you convince people to Fund your organization

- ▶ Communicate what your organization is doing and why that is important to the community and to them:
- ▶ When possible, link it back to humans and human health. “Our work protects your water”
- ▶ Remember you are a storyteller, and your story is that what your organization does matters and impacts people locally, regionally, and globally.
- ▶ Share personal stories of the pride and ownership you feel from working at TFS
- ▶ Make sure you communicate fiscal responsibility, vision for the organization, and the value of the donation. For instance, the Center for Coastal Studies gets >\$3 worth of science done for every dollar donated by leveraging that donation



who might want to support the cause

Identification: Looking for contacts to connect

- ▶ University/College donor databases and alumni contact information
- ▶ Friends and user base
- ▶ Collaborative organization memberships

Communication Tools vary with the target audience

- ▶ Age 50+: email, snail mail, web pages
- ▶ Age 35 to 50: text, web pages, email, social media
- ▶ Age 20 to 35: social media, text, video, web pages, email



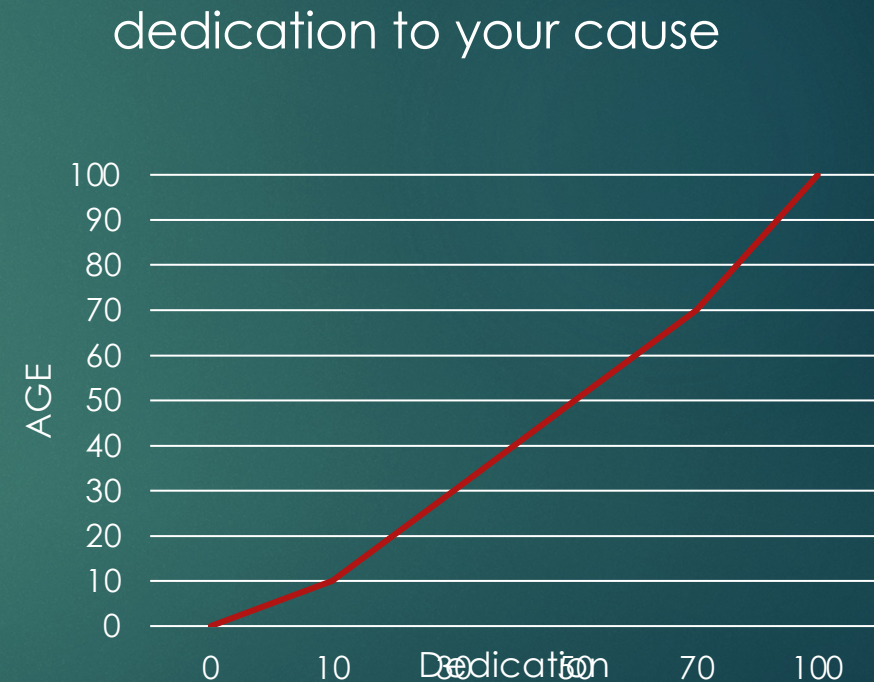


Fundraising tips

- ▶ Finding and using the right data management tool is important; some are cloud based and can give you real time info on the go.
- ▶ If you want money, ask for advice, if you want advice, ask for money
- ▶ Be as passionate as you can authentically be
- ▶ Consider setting membership levels (5 K, 10K) that let those members attend special events and have more access to scientists and the science (Bird banding, geology tours, lake water chemistry)
- ▶ **Friend-raise first, then fundraise:**
 - Branded merchandise and newsletters
 - Seminars and information sharing to grow knowledge
 - Special Events such as hiking tours, bird watching, canoe trips, etc.
 - Docent programs, family programs, provide value for their support.

There is a science to donor development!

- Keep a database of friends and donors. Include information on their backgrounds and interests, and their history of giving
- Have a plan to follow up, including a plan for showing recognition if they do give
- Look at long-term strategies: how to move them through the pipeline ->
- Most of us do not like to talk about money or ask for money. It feels icky. That is ok.
- Many people view their giving as a way to support something they cannot do
- Give your donors a reason to feel good about supporting your organization.



The human equation for both Fundraising and grant-writing (spoken and written communication)

1

Get to know what they are interested in funding; don't try to sell environmental causes to people who only fund hospitals and vice versa. Don't apply for a grant you are not qualified for!

2

Make sure you communicate fiscal responsibility, vision for the organization, and the value of the donation.

3

Communicate that this is an investment in tangible numbers (# of projects done, economic opportunities, grant funding leveraged, jobs created, students supported)

4

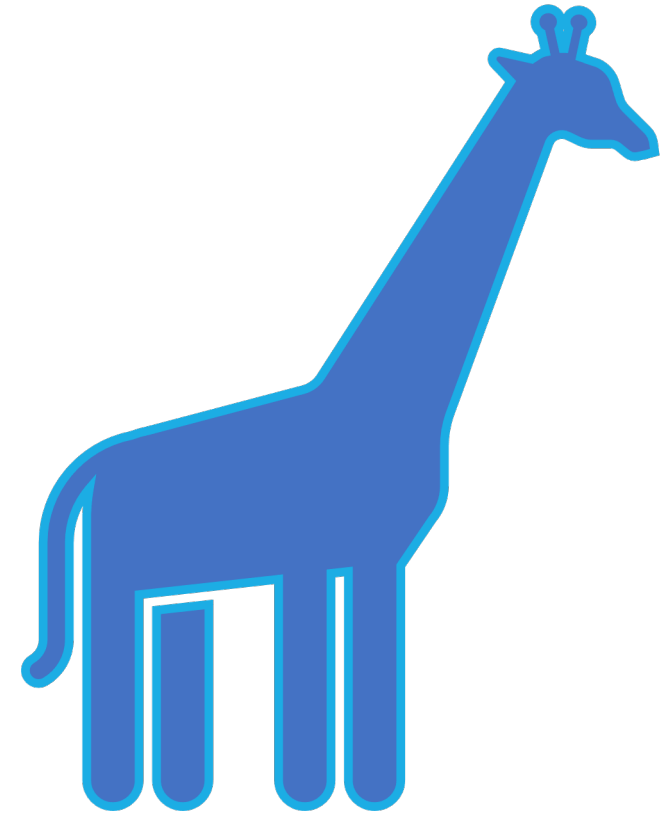
If you are not passionate and enthusiast, they will not be; get across your motivations for supporting the project, tell them why you are doing this (personalization).

5

Remember donors and grant funders are busy and have many competing requests for their time and money

the “ASK”

- ▶ Know what you are going to ask FOR
- ▶ Develop different projects for different interests
- ▶ **All Donors Welcome:** develop strategies to include donors of all means and all types of participation from crowdfunding to tradition large gifts to peer to peer giving
- ▶ Your ask must be sincere, or people will see through it.
- ▶ Who is going to do the ask? Are you the asker, or the talent? Either way remember, **people give to people.**
- ▶ Do not be afraid to show the need, warts and all. Sometimes people are willing to become donors, but they do not know there is a need because they only see the polished version of things.



FOCUS

There are five essential tasks of strategic management. They include:

1. developing a strategic vision and mission,
2. setting objectives,
3. crafting tactics to achieve those objectives,
4. implementing and executing the tactics, and
5. evaluating and measuring performance.

Monkshood Larkspur at Fog Lake 1 (Amanda Young)

It's true.... you can't avoid setting smart goals



Seven steps of strategic planning



From Performance.gov where the federal agencies post their plans

The cornerstones of TFS strategic plan



DEI commitment



Expanding Research
Capabilities &
Facilities



Financial Diversity &
Continued Stability



Educational Support
and Outreach

Fun fact: very similar to the Center for Coastal Studies Strategic Plan

Example: establishing stretch goals and feasibility- Center for Coastal Studies



ENDOWMENT
BUILDING
FEASIBILITY STUDY



GAP AND SWOT
ANALYSIS



SURVEYING SCIENTISTS ON THEIR 2-
5-10 YEAR GOALS FOR PERSONNEL,
EQUIPMENT, LAB SPACE,
INTERNS/VOLUNTEERS, AND
HOUSING



EXAMPLE FOR ME: NEW BUILDING
FOR EDUCATION AND OUTREACH
HOUSING FOR 40; GROWTH TO 60
EMPLOYEES- GROWTH FOR
EDUCATION AND WATER QUALITY
PROGRAMS

How do you make your story heard in a noisy world?

“Put it before them briefly so they will read it, clearly so they will appreciate it, picturesquely so they will remember it, and above all, accurately so they will be guided by its light.”

-Joseph Pulitzer

Sun reflecting off the
lake after a storm
(Amanda Young)



Resources

- ▶ Ten things to keep your Strategic Plan from Hitting the shelf
<https://onstrategyhq.com/resources/ten-things-to-keep-your-strategic-plan-from-hitting-the-shelf/>
- ▶ 7 steps for strategic planning: <https://www.performance.gov/blog/strategic-plan-7-steps/>
- ▶ Marketing for Scientists: how to Shine in Tough Times – Mars J. Kuchner, 2012
<https://www.amazon.com/Marketing-Scientists-Shine-Tough-Times/dp/1597269948>
- ▶ Rule of Three <https://ethos3.com/rule-three-presenting/>
- ▶ Five essential tasks of Strategic Management
<https://medium.com/@evanderburg/5-essential-tasks-of-strategic-management-57d7bc097cc7>