

Nonprofit Hacks for Thriving in Tough Times.

Accelerating growth, performance and impact for nonprofits and social enterprises around the world.

ALTRUIST



Which frame defines you?

95% of organizations (of any tax status) live with malfunction and stagnation.



Nonprofit

Ambiguous measurement, underfunded programs, underpaid staff, information overload Flat/zero growth.

Less good for the world.



Social Impact Enterprise

Best practice organizational strategy & effective execution. Annual growth > 20%.

More good for the world.

Leadership

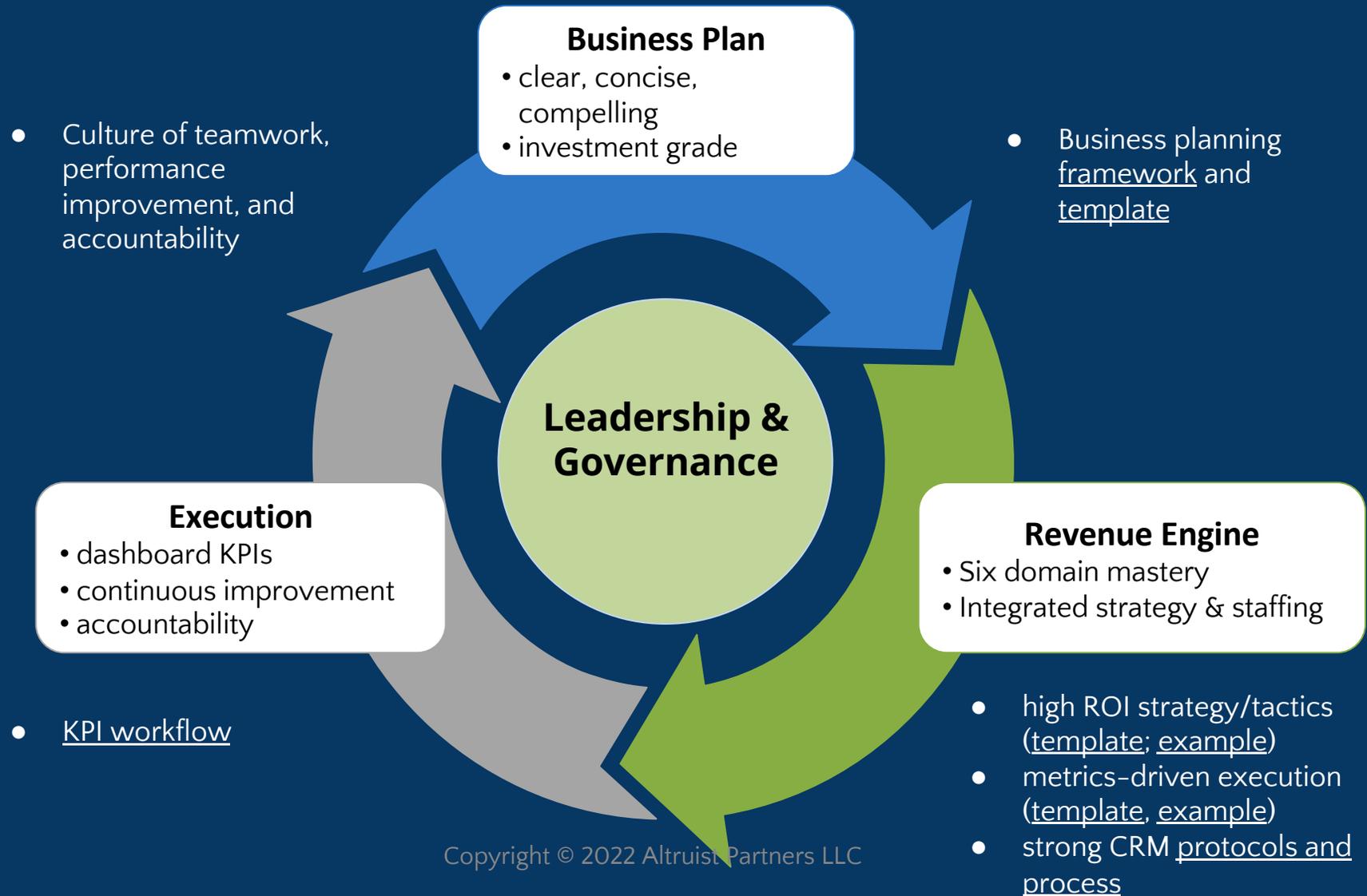
Failure Drivers

1. Scarcity mindset
2. Change aversion
3. Conflict avoidance
4. Proximity error
5. Analysis paralysis
6. Opinion = fact

Success Drivers

1. Optimism
2. Courage
3. Grit
4. Focus
5. Discipline
6. Urgency

Altruist Impact System: integrated planning, revenue, execution



Revenue Strategy

Acquire, engage, appeal, report and operate in all SIX revenue domains (program dependent)

Type	Segment	LOW ROI (survival)	HIGH ROI (success)
Individuals	Major, Annual, Planned	Event/mail solicitation	Targeted relationships
Foundations	Grants, PRIs	Prioritize grants	Outsource grant writing
Corporations	Grants, Sponsorships, Partnerships	Corporate grants	Corporate partnerships
Agencies	Local, State, Federal	Agency dependency	Government relationships
Earned Income	Memberships, Consulting, Licensing, Services, Other	Marginal earnings	Entrepreneurial
Impact Capital	Individual, Institutional	No due diligence prep	Investment grade

Revenue Strategy

Acquire, engage, appeal, report and operate in all SIX revenue domains (program dependent)

TYPE	SEGMENT	goal	prospects	acquire	engage	solicit	report	staff	ops	budget
Individuals	Major									
	Annual									
Foundations	Grants									
	PRIs									
Corporations	Grants									
	Sponsorships									
Agencies	Local									
	State									
	Federal									
Earned	Memberships									
	Consulting									
	Licensing									
	Services									
	Other									
Impact Capital	Individual									
	Institutional									

Revenue

First, define & measure

a. investor type & relationship stages

F: foundation C: corporation I: individual A: agency E: earned D: debt capital

<i>code</i>	<i>stage</i>	<i>description</i>
1	acquire	confirmed capacity, affinity, contact info
2	engage	we're talking
3	appeal	proposal submitted--written or verbal
4	yes	proposal approved, no funds given
5	no	proposal declined
6	report	cash in hand or pledge/contract documented

Revenue

b. weighted investment goals for each prospect

- a. Start with 2x – 10x of past gifts based on affinity level or best estimate of investment capacity.
- b. Avoid analysis paralysis and extensive research. Continuously seek new knowledge from the prospect.
- c. Update \$ goal, % likelihood, and close date as relationship matures.

5%: use this conservative rating for all Stage 1 prospects.

25%: use this higher weight if conversations in Stage 2 go well.

50%: advance to this weight if prospect is in stage 3 and proposal looks likely; if a proposal is active but less certain, keep at 25%. (50% is the typically the right rating for prospects with history of affinity and investment.)

75%: for Stage 4 prospects (never forecast absolute certainty)

Revenue

c. establish direct responsibility for each prospect

The Relationship Manager (RM) is the individual directly responsible for the quality, number and consistency of all contacts and the overall maturation of the investor relationship. The RM provides solid “air traffic control,” coordinating all communication and contacts; the RM ensures all measures are entered quickly and accurately.

Revenue

d. define & record your contacts

Define: A “contact” is a substantive, personal, one-on-one conversation between a board or staff member and a prospect or investor that deepens the prospect or investor’s understanding of the organization and how it aligns with the prospect or investor’s own goals and ideals.

Record Contacts:

1. Within 24 hours of occurrence
2. Only substantive interactions: face-to-face is best, phone is next, email is rare
3. Succinctly:
 - a. what was discussed
 - b. why it was significant to the relationship
 - c. how it affects the proposal under consideration
 - d. next step and date
 - e. any change in investor stage
4. Each Investor must receive at least three Stage 6 Contacts.

Revenue

e. define activity levels

Contacts per Investment

Identification contacts	2
Cultivation contacts	10
Solicitation contacts	3
Stewardship contacts	3
Total	18

Activity expectations

Board	1 per month
Advisory	1 per month
CEO	5 per week
Director	5 per week
Officer	15 per week

An organization with

- 10 board members
- 16 advisory board members
- 1 CEO
- 1 Dir. of Investments & Partnerships
- 2 I&P Officers

has the annual capacity to make 2325 contacts. At 18 contacts/per investment, that's 129 annual investments. If 50% are successful, that's 64 annual investments.

At an average of \$50k per investment, **that's \$3.21m in annual revenue.**

Revenue

3. Configure the database with these fields

investor	type	stage	proposal	weight	RM	close	contact	next step
Dan Smith	I	1	\$50,000	5%	Jeff	10/15	[text]	event 6/2
Fran Hart	C	2	\$75,000	25%	Sue	12/1	[text]	meeting 6/7
Jin Lee	C	2	\$25,000	50%	Sue	9/1	[text]	proposal 6/9
Jo Vasquez	A	3	\$100,000	75%	Hank	10/1	[text]	call 6/25

Scorecard

Compelling scorecard,
cadence of accountability

Prospects by Type and Relationship Stage (Investment & Partnership Pipeline)

	1	2	3	4	5	6	<i>totals:</i>
Individuals	55	15	10	5	2	10	97
Foundations	2	3	1	0	0	2	8
Corporations	1	4	0	2	1	3	11
Agencies	0	0	0	0	0	0	0
Earned Income	0	0	0	0	0	0	0
June 15 TOTAL	58	22	11	7	3	15	116
(30-May)	43	20	9	8	7	15	102
(15-May)	23	15	6	2	6	10	62
(1-May)	10	11	2	1	2	3	29
Dollars by stage:	\$10,950,000	\$5,475,000	\$1,200,000	\$750,000	\$250,000	\$1,450,275	

Simple KPIs (start right now):

revenue vs. goal: 25%
 # contacts this period: 47
 # potential contacts: 90

Advanced KPIs (min 12 months of data):

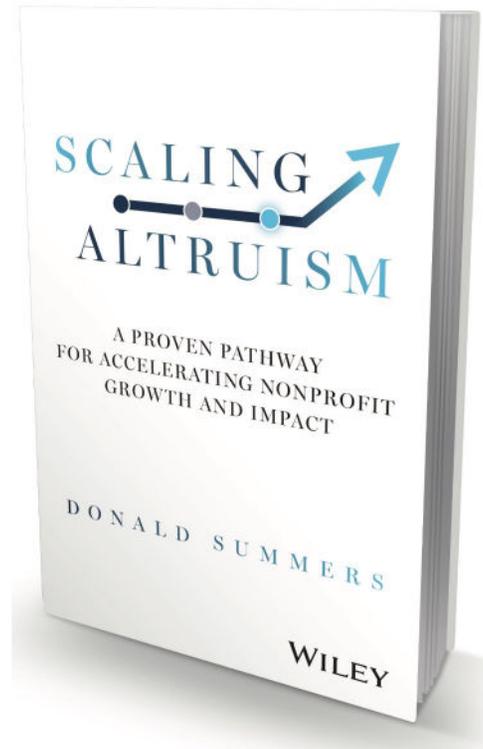
- conversion rate by stage
- conversion rate by relationship officer
- investment size distribution
- annual loyalty



The roadmap to accelerated growth and impact

Need help?

info@altruistpartners.com





Altruist Impact Accelerator

altruistaccelerator.org

About AIA

The first nonprofit accelerator for all mission types

Self-paced, community supported, expert guidance

Altruist Impact Accelerator

Access a proven, comprehensive methodology to catalyze nonprofit growth and revenue.

IS THIS RIGHT FOR MY ORGANIZATION?

