Engaging Foundations and Corporations as Major Donors with Dani Bethune

Andrew Olsen:                  This is Andrew Olsen with the Rainmaker Fundraising Podcast, coming to you today from beautiful Palm Springs California at the City Gate Network Conference. I'm here with two special guests. My guest co-host for the week is my good friend, Shawn Saunders, from Dickerson, Bakker & Associates. Shawn, good morning.

Shawn Saunders:              Good morning. Good to be here again.

Andrew Olsen:                  Awesome man. We're really excited. We have a special guest with us today. Dani Bethune, from Union Gospel Mission Dallas. Dani, we're so grateful that you're here.

Dani Bethune:                   Thank you for having me. I appreciate it.

Andrew Olsen:                  Super excited to talk to you today. We've got a great lineup of questions. Before we jump into that, give our listeners just a quick understanding of who you are, what you do, and who Union Gospel Mission Dallas is.

Dani Bethune:                   Oh yeah. Union Gospel Mission Dallas is a homeless shelter in Dallas, Texas. We serve homeless men, women, and children in two locations. We have our Calvert place, which serves homeless men and then we have the, Center of Hope, which serves homeless children, I mean, homeless women and then women with children. Last year alone, we served close to 4,000 homeless men, women and children in Dallas, Texas. A little about myself. I am 16 year veteran in fund development, have raised funds for numerous organizations and for numerous causes in the Dallas/Fort Worth area.

Andrew Olsen:                  Awesome. The first question I want to ask you, comes out of a conversation that we all had yesterday. See, you were sharing with us about some of, the successes that you've had engaging with foundations and corporate partners in the community. That's an area where a lot of rescue missions have interest in going, when not many of them have started yet, or they've not been able to really scale up a program like that. Talk to us a little, bit about how you approach those, kind of organizations and what you've seen to be the most successful way to engage them.

Dani Bethune:                   Yeah. I think number one, we have to realize that there's a Christian somewhere. In all these organizations, and foundations, and corporations that you work with, there is someone like you there. I think the next thing about it, is that you can't be shy, or shy away from it. At the end of the day, you're serving people. That's what the gist of your work is. That's what other foundations and corporations want to do. They want to get help people too.

Andrew Olsen:                  Okay. What I hear, which is I think different from the way a lot of people in the nonprofit sector at large think about this is, you've focused on the people, right?

Dani Bethune:                   Right.

Andrew Olsen:                  I think a lot of times I hear people saying, development officers saying things where the foundation or the corporation are seen as the big entity right?

Dani Bethune:                   Right.

Andrew Olsen:                  It's almost like an anonymous organization that they're trying to break into ...

Dani Bethune:                   Right.

Andrew Olsen:                  ... and treat it like this big monster, when really you're saying it's all about the people who inhabit the organization more than anything else. Is that right?

Dani Bethune:                   Definitely. I mean, somebody had to write the check. I mean, there has to be a person whose behind that screen, behind the Wizard of Oz screen, writing the check. Yeah, there is a person that definitely is going to answer the phone when you call. I've learned to call people late in the day.

Andrew Olsen:                  Okay.

Dani Bethune:                   That's when I get a lot of phone calls instead of early in the morning. I call around the 3:30, four o'clock time frame, because people are somewhat trying to leave work, but they don't know if it's an emergency phone call. They'll kind of pick up at that time. That's kind of been my way of getting into it. You can't be afraid. That's, I think the one thing about it, as Christians that do mission work. Why are we fearful? God doesn't call us to be fearful, so why [crosstalk 00:03:39] are exhibiting fearful ways in work that we know that's helping to God's kingdom? It's contradictory to what we're doing.

Andrew Olsen:                  Makes sense.

Dani Bethune:                   Yeah. We can't shy away from it.

Andrew Olsen:                  Do you feel like there's a difference in the way you build the relationship with an individual who's a corporate or foundation partner, versus an individual donor?

Dani Bethune:                   No.

Andrew Olsen:                  Okay.

Dani Bethune:                   No, not at all. Not at all. I just think about ... I recently went on a trip. I talked to a very large major donor. I also talked to foundation. I told both of them what I was going to be doing on the trip. I told them my own fear, as a part of the trip. Both of them then said, "We'll pray for you."

Andrew Olsen:                  Okay.

Dani Bethune:                   There was no different in my conversation with the foundation director and with this major donor, that I was talking to as well. I don't think there's a difference at all. I think we, again fear, makes us approach it as it's different, but it's not. It's people. I always think about it like this. We're building relationships every day.

Dani Bethune:                   I mean, you can build a relationship with somebody you see at the grocery store, somebody that's working with you in a building, one of your clients. It's happening every day. Why do we then try to use a different tactic, when it comes to relationship building, when it's all the same as getting to know people, getting to know their interests, getting them to know you, and what you like and then seeing where you find common ground.

Andrew Olsen:                  That's also different than, what I think a lot of folks assume the way to engage with a foundation is, which is, a lot of organizations just sort of unsolicited, send off a grant request, right, and hope that someone, somewhere in the ether will find it [crosstalk 00:05:13] and say, "Wow. This is amazing. I have to fund this."

Dani Bethune:                   Yeah.

Andrew Olsen:                  I don't believe that's the way it happens. I think you have a perspective on that.

Dani Bethune:                   Yeah, I do, definitely. Yeah. I don't believe in blind solicitations. It's a waste of time. You have so much limited time in nonprofit, because you're doing so many, different things as maybe the only person in your department, and only two people in your department. You can't turn around and say, "I'm just going to send out 10, 15 applications," and hopefully, fingers crossed, something would happen. No. I believe that you should always contact the foundation, contact the corporation, email, get somebody to respond back to you, before you then submit the application. It serves you better.

Dani Bethune:                   Number one, they're going to give you advice about what you should write and submit. That way you're not wasting time trying to figure out, "What should I write or submit?" Number two, they now are expecting your application. There was a funder in Dallas that I reached out to. I let her know about my trip I was going on.

Dani Bethune:                   When I got back I'm like, "I'm back." She was like, "Okay. Awesome." When she wrote an email to me, she said, "Dani, I sent this to you before we released it to the general public." I got the information before the general public, even received information about the grant process. She's looking for us to make a submission. You do. You need to call them, reach out, contact them in some way, before you submit an application.

Andrew Olsen:                  That's awesome. Okay. One of the other things that we talked about, that I think would be interesting for our listeners is, your approach to major gift work. This is another area where a lot of organizations in the homeless service base, whether rescue missions or other types of organizations, they tend to struggle. To be candid, direct mail has allowed a lot of organizations to exist ...

Dani Bethune:                   Yeah.

Andrew Olsen:                  ... You know, have [crosstalk 00:07:05].

Dani Bethune:                   Yeah. They get to hide behind closed doors. Yeah, yeah. Definitely.

Andrew Olsen:                  Not a lot of organizations in your space have really developed what I would consider and what Shawn would probably call a best practice, major gift program. You seem to have figured that out. I'd love to hear ... One of the big questions that we hear from rescue mission is, or statements is, "Our donors aren't major donors, right? Rescue mission donors don't give big gifts. They give $2.29 for a meal. We don't have those people a university or a hospital might have." Is that a mentality that you had to fight against when you came to the mission? Did they already embrace, kind of the approach that you have?

Dani Bethune:                   No, it's a mentally right, that people ... We're so used to people giving them food sometimes in the mission space. We had this $2.69 mentality about what a donor will do. I think something that Shawn and his group are doing, I think, which is good is that you got to know the capacity of your donors. Let's not assume that the person whose been giving a $2.69 gift every month, can only do that. We need to really look at our data, and look at our donors to say, "What can they give?" There are a lot of hidden gems laying in databases, and exo-spreadsheets of our mission donors.

Andrew Olsen:                  Yeah.

Dani Bethune:                   Yeah.

Andrew Olsen:                  Can you give us any examples of sort of those hidden gems that you've found in the last couple years, while you've been at the mission?

Dani Bethune:                   Yeah. I would say some hidden gems are my board members.

Andrew Olsen:                  Say more about that.

Dani Bethune:                   Yeah, yeah. Literally, that's your first major donors right there, your board members. Those are your major donors. You should be working them first, building the relationship with them. As they get more engaged in the organization, guess what they'll do? They'll bring their friends. That's what we've learned, kind of at Union Gospel Mission Dallas is that we engaged our board members more. From that, they have really been helping us with our major gives. They've been bringing their friends over.

Andrew Olsen:                  Okay.

Dani Bethune:                   We've been conducting tours with their friends. When the friends come over, they know that we're asking for money. There is no qualms about it, we know. We also created a program called, UGM Family Partners.

Andrew Olsen:                  Okay.

Dani Bethune:                   Through that program, we're asking donors to engage their family in our fundraising and in our organization. We ask them to make a three year commitment. We're getting them to make these pledges, so we can get multi-year funding. And then, we ask them to volunteer ...

Andrew Olsen:                  Okay.

Dani Bethune:                   ... as a family during, the course of the year. We also ask them to come back and give us a perspective on what they think about homelessness and then we present to them, some issues we're battling, and getting their advice on how we can manage that. A lot of these donors are successful business people too. They have some great advice that can be used in the nonprofit sector.

Andrew Olsen:                  What's the public reception of that kind of program and approach been for you?

Dani Bethune:                   Oh yeah, it's been great. As a matter of fact, because of the UGM Family Partners, we were provided a million dollar challenge grant. We had a donor who told us he would give us $25,000 over a three year period.

Andrew Olsen:                  Okay.

Dani Bethune:                   If we met the million dollar challenge grant as a part of this program, then we would get another $25,000. We'd get another $75,000. In the end, that donor would have made a 1.15 million donation to [crosstalk 00:10:26] the organization, just because of us starting this UGM Family Partners program.

Andrew Olsen:                  That sounds like pretty good return.

Dani Bethune:                   I think it is fabulous return. That has helped to engage our board members in wanting to see us hit that mark.

Andrew Olsen:                  Okay.

Shawn Saunders:              Yeah.

Andrew Olsen:                  That's really cool.

Dani Bethune:                   Yeah.

Shawn Saunders:              Dani, if I can ask you this question. In terms of doing rescue mission work ... It sounds like you've worked at other nonprofits, besides just rescue missions, right?

Dani Bethune:                   Yes.

Shawn Saunders:              Do you see challenges, maybe when you came in, but particularly now. Are there, challenges and trends that you're seeing, that are impacting your ability to raise funds?

Dani Bethune:                   Yeah. I think the trend that I'm seeing is that there are not a lot of good fundraisers out in the community. I think that is a trend, or that fundraisers are leaving the industry. That is another trend you see. I have a lot of my friends are in the nonprofit sector. A lot of them have gotten out of the nonprofit sector, either to kind of start their own consulting firms, or they've gone into a corporate entity. I think that's a trend I'm seeing is that, people are leaving. It's hard to get good relationships being built, if folks aren't willing to stay in the industry and help kind of do the work.

Shawn Saunders:              Yeah. Another question still on this same topic, I remember back in 2008, that was the year I got into fundraising. I got out of sales and got my first fundraising job. We all know what happened in '08. One of the things, it wasn't challenging for me, because the stats were showing, things like chronicle philanthropy, you having, articles saying that, the giving to social service organizations hadn't dipped from major donors. That changed the foundation game for sure. The giving didn't go down for social service organizations even then. Now, that we're in this prosperous time, I guess the question is, are you seeing something that would be opposite from that, are more people giving to non social service? Are you seeing giving go down in any way? I guess that's the question.

Dani Bethune:                   Yeah. I think you're seeing a lot more competition. That's what you're seeing right?

Shawn Saunders:              Yeah.

Dani Bethune:                   You're battling against a lot more competition in the industry for dollars.

Shawn Saunders:              Yeah.

Dani Bethune:                   I think about in Dallas, I think there's over 2500 nonprofit organizations in Dallas. You're competing against those 2500, plus those that are in your field, in your line of business ...

Shawn Saunders:              Right.

Dani Bethune:                   ... as well. I think if there is a trend, it's trending more nonprofits are stepping into this fundraising, needing money role, so we're competing more for dollars, than we are against anything else. At the end of the day, there's plenty for everybody.

Shawn Saunders:              Yeah. Yeah.

Dani Bethune:                   There are a lot of people in the community that have money that we don't know.

Shawn Saunders:              Right.

Dani Bethune:                   They're not giving it out.

Shawn Saunders:              Right.

Dani Bethune:                   We got to figure out, kind of how do we get our existing donors to give more, but also them connecting us to their friends, that they know are not givers.

Shawn Saunders:              That's right. Those two go hand-in-hand with the major gifts, reps I coach. I say, "Yeah, we're going to grow your portfolio donors, the current donors," and one of the ways we're going to do that, is we're going to get them to introduce their friends, I'm doing acquisition [crosstalk 00:13:43].

Dani Bethune:                   Right.

Shawn Saunders:              As you know, when they do that, when they're introducing their friends, and bringing them for tours and things like that ...

Dani Bethune:                   Right.

Shawn Saunders:              ... they're giving, many times will go up without you even asking.

Dani Bethune:                   Yeah. Right.

Shawn Saunders:              They've got more stake in it. You know, we can streamline these things. Another question, in terms of ... I think you would agree with me, that fundraising requires a certain element of creativity and innovation. Just some of, the challenges that we've talked about already. With those things, there can be risk. What are some of, the things, maybe you tried Dani, in the last couple years, that was risky, and what did you learn from it?

Dani Bethune:                   Yeah. I have worked in several organizations. I've worked at the Salvation Army. That's a Christian organization.

Shawn Saunders:              Yes.

Dani Bethune:                   I've worked at Big Brothers and Big Sisters, which is not. I've worked at Methodist Health System Foundation, which is a Christian Hospital. Let's, kind of just go there on a platform. What has been successful? You have to be innovative. You have no choice. I mean, you really have to be innovative. I'm not saying it's as innovating as chasing dollars.

Shawn Saunders:              Right.

Dani Bethune:                   Innovating in the way you want to serve your client. At the hospital, we had a sexual assault nurse examiner's program, which is basically providing kits to women who have been sexually assaulted when they come to the hospital. The one thing that was lacking, was counseling. You're helping the physical part of a woman, but you're not helping them emotionally.

Shawn Saunders:              Right.

Dani Bethune:                   One thing that we came up with, which was risky to do and we're a hospital. Yeah, but we're not counselors. Hospitals are not counseling places. One thing we do, we went to a couple of funders and asked them if they'd be willing to support a sexual assault counseling facility on the hospital's campus. Not normal.

Shawn Saunders:              Yeah.

Dani Bethune:                   Not normal at all and risky in that sexual assault is a very, kind of, we don't want to talk about it.

Shawn Saunders:              Yeah.

Dani Bethune:                   We don't want to talk about it. It panned out very well. We ended up raising over $300,000 from a variety of foundations. We just built on the funding, right? As one foundation gave, we built on, "We got this much money. Help us get some more."

Shawn Saunders:              Right.

Dani Bethune:                   We just kept building upon that. A risky thing to do, but it worked. It was something the hospital had never even tried before ...

Shawn Saunders:              Yeah.

Dani Bethune:                   ... never even thought of. They were like, "What? Providing counseling? We help you physically. We don't help your mind, right, [crosstalk 00:16:08] unless we're doing brain surgery. Other than that, we don't do it." Yeah. Something very, out of the norm ...

Shawn Saunders:              Yeah.

Dani Bethune:                   ... for a hospital, and is out of the norm for that particular hospital, to raise as much foundation funding as they had. It hadn't been done before. Christian organization. We have to know that there is a Christian out there. They're there pulling and rooting for you, even if the foundation isn't one.

Shawn Saunders:              Yeah. Too, that went along with that, is there is, as I talked about in my workshop yesterday, there's a bigger ... There's someone else who's in charge [crosstalk 00:16:47] ultimately, right? Even those who aren't Christians.

Dani Bethune:                   Right.

Shawn Saunders:              Maybe, right, if this could be an opportunity for them to get exposure to ...

Dani Bethune:                   Right.

Shawn Saunders:              This could be a gateway into Christianity, or it could just be, they want to bless the community.

Dani Bethune:                   Yeah. Yeah. The one thing I think some of, the organizations that aren't Christian and even if we keep saying how we're serving faith based community and we're helping people understand the gospel of Jesus Christ, again, it comes back to people want to help people.

Shawn Saunders:              Yeah. That's right.

Dani Bethune:                   They wanted to help the people. They could understand somebody being assaulted, and they needed counseling afterwards. They could understand it, even [crosstalk 00:17:25] if there was no biblical context to it ...

Shawn Saunders:              Right.

Dani Bethune:                   ... they understand this, understood that.

Shawn Saunders:              Yeah.

Dani Bethune:                   I think it boils back down to that again is, it's really about people. In every last organization I can think of, that I've worked for. Our clients have had similar barriers to being successful.

Shawn Saunders:              Right.

Andrew Olsen:                  Yup.

Shawn Saunders:              Yup.

Dani Bethune:                   They all have barriers to being successful, every last one of ... That's what nonprofits are doing. We're helping them to overcome those barriers to be successful, productive people. Like I always say, "We're getting them back to God's purpose."

Shawn Saunders:              Yeah. Exactly right.

Dani Bethune:                   Yeah.

Shawn Saunders:              Yeah. Last question I have ... Thank you for that. What tips of encouragement ... Let's say we've got some listeners here. They're thinking about, "Hey. I would like to start engaging more of the corporations and foundations of my area," and really launching that element of a major gift fundraising effort. What tips of encouragement would you give to these, that would, you know that have been thinking about this.

Dani Bethune:                   Yeah. The first thing that I would say, is be still and know that I am God. First, listen, let go.

Shawn Saunders:              Psalm 46.

Dani Bethune:                   Yeah. One of the ... Psalm 46:16. Let go. Let go and know that God is going to carry you. He has already given you everything you need to be successful. It's in you.

Shawn Saunders:              Yes.

Dani Bethune:                   Use it.

Shawn Saunders:              Yeah.

Dani Bethune:                   Use what God has given you to be successful. Number two, you can't be fearful. Your clients are already living in a world of fear.

Shawn Saunders:              Yeah.

Dani Bethune:                   You can't be fearful with him. You have to be the bold one and move forward and reach out to these foundations and corporations.

Shawn Saunders:              Yeah.

Dani Bethune:                   Number three, find a friend. If you're scared, find a friend. Get a friend, in the community that's doing similar work as you are and have somebody to kind of help encourage you. You're going to need it. Number four, make the call. Do it. Make the call. Not that you're making the call for yourself, because it's not about you. Make the call for that client that you see every day, that has three kids. She's been living in her car, she's struggling. Make the phone call for that man that's addicted to heroine and he's trying to get off. Make the phone call for the guy that you may see on the corner in your own neighborhood sometimes, who needs help. That's who you're making the call for. It's not for you.

Shawn Saunders:              Yeah. I'm hearing you saying, make the mission, the mission.

Dani Bethune:                   Make [crosstalk 00:19:44] the mission, the mission.

Shawn Saunders:              Make your mission, the mission.

Dani Bethune:                   Make your missing, the mission. Yeah, let that be your driving force.

Shawn Saunders:              That's good. Yeah, well thank you for joining us today.

Dani Bethune:                   Thank you [crosstalk 00:19:49].

Andrew Olsen:                  No. This is awesome. Not just make the mission, the mission, but be bold.

Dani Bethune:                   Yeah.

Andrew Olsen:                  I think that sums it up for me. I think that's a really powerful statement and recommendation of the community. Thank you Dani for being here. I really appreciate it.

Dani Bethune:                   Thank you. Appreciate it.

Shawn Saunders:              Thank you.

Andrew Olsen:                  If somebody wants to get in touch with you to learn more from you, or just to have a friend in the community ...

Shawn Saunders:              Yes.

Andrew Olsen:                  ... what's the best way for somebody to get in touch with you?

Dani Bethune:                   Yeah. My Instagram, Twitter ... No. I'm just kidding. You know how we [crosstalk 00:20:22]. That's the way we all do it. No. If you want to get in contact with me, you could email me at Dbethune@UGMdallas.org. That's Dbethune@UGMdallas.org.

Andrew Olsen:                  Awesome. Thank you so much.

Shawn Saunders:              Nice.

Dani Bethune:                   Thank you.