Andrew Olsen: Hey, good afternoon. This is Andrew Olsen, co-host of the Rainmaker Fundraising Podcast. I'm here with my good friend and partner, Roy Jones. Hey Roy, good afternoon.

Roy Jones: Hey, good talking to you, Andrew. I'm excited about this session. This is going to be a lot of fun. Yeah, we've got two legends in the industry with us today.

Andrew Olsen: Two very fun guests, so today with us we have Bob Lipps and Marc Stein, the co-founders of the Global Center for Non-Profit Excellence. Gentlemen, good afternoon. Welcome.

Bob Lipps: Good afternoon. Great to join you.

Andrew Olsen: Glad you guys could be with us.

Marc Stein: Good talking to you.

Andrew Olsen: Hey, guys, before we jump into the meat of our hour together, I was wondering, Bob, could you just take a few minutes, give us a few details what is the Global Center for Non-Profit Excellence?

Bob Lipps: Yeah, I would love to. In the business world, it would be called an orchestrated network, so the Center, as our friends call us, are similar in concept to Uber or Airbnb, who are both orchestrated networks. But rather than bringing together people in cars or people in homes, we bring together the three groups of non-profits, funders, and business professionals who serve the non-profit community, and we do that all under an umbrella of operational best practices. So, the Center, along with the industry, who built a set of comprehensive best practices, sort of of the people, by the people, for the people, and they cover all six areas of an organization's operations.

Bob Lipps: They're the areas that you can imagine: program management and accountability, governance, legal, and risk management, fundraising, marketing and communications, finance and accounting, and people in organizational development or HR, and then finally business systems, IT, and facilities. Taken as a whole, these six areas of operations cover everything a non-profit organization does.

Andrew Olsen: Huh. That's really interesting. All right, two questions here. First of all, how did you guys come up with this idea? What led you to this?

Bob Lipps: What a great question. Well, after about 30 years each working in the non-profit world, either in the C-Suite or on boards of non-profit or being major donors, and also being business professionals in each of our own areas of discipline, consulting with, serving these organizations, we saw a continuing theme and a continuing gap in the whole non-profit ecosystem. The theme is that basically non-profits need more funding. If you interview a CEO of a non-profit and say, "What are your top three concerns," one of them is going to be we need more funding.

Bob Lipps: Likewise, if you interview funders, major donors or foundations, things like that, you ask them, "What are the top three concerns you have in your whole funding world," one of those is going to be having confidence in the organizations that we are sending our money to. And so we've seen that. We've lived it, and we haven't seen any solutions for resolving those two issues other than people just strolling along in life trying to raise more money, and funders having more questions about organizations. Because of that, funds are locked up that could be otherwise released into the non-profit world.

Bob Lipps: When we've asked funders what they're looking for, they're saying, "We want more confidence in how these organizations are run so that we know our funds are going to be invested well." And then we say, "Well, where does confidence come from?" And it's basically operational competence. It's one thing that we've noticed, sadly, but the non-profit world doesn't operate with the highest degree of competence always. So, how can we help them gain more competence in their operations? Well, competence can come from using best practices operationally.

Bob Lipps: That lead us to this focal point of creating a vetted eco-system where non-profits, funders, and business professionals come together with a understood set of best practices and help each other rise to the occasion.

Andrew Olsen: Huh, so I think it might be good for our listeners just to understand. I know you've said that the two of you each, I think, have about 30 years experience in this space. What drew you guys to the non-profit sector? And why do you make your home here?

Bob Lipps: Yeah, really great question. Marc can talk about his background, but I started out as a business person. I'm a CPA and an attorney, also professional risk management person, but my first career was doing CPA work. I started out in Arizona working with a CPA firm and making the partners really wealthy. All of a sudden I realized there's more to life than creating wealth, whether it's for somebody else or for myself, and wanted to use my business skills to have a greater impact on the world. Love making money. We can all make money our hard labors, but hopefully there's something more than just that. So, with a real desire to have a positive impact on the world and the needs of society, I started looking for other venues than CPA firms that I could work and help the organization thrive in their purposes.

Bob Lipps: We both happened to be people of faith, so our faith in God really does drive us to want to help the non-profit world, help society, help alleviate suffering and poverty, and what better way could we do that by investing in organizations and helping them achieve their goal?

Andrew Olsen: [crosstalk 00:06:12]

Marc Stein: Yeah, Bob and I have similar paths that way. I spent the first half of my life with very much ambition for myself and came to a crossroads where just had an opportunity to really see the tremendous need in the world and felt that I wanted to spend the rest of my life helping people. So, my ambition shifted, and about that time, prior to that I was a pretty classic business guy, an entrepreneur, was involved in a lot of businesses, building businesses, growing businesses. Unlike Bob with his designations, mine is a MBA, so I'm really thinking in terms of top line growth and using best practices to really leverage opportunity and just saw tremendous opportunity within the non-profit space.

Marc Stein: But very quickly, I also saw that it was very inefficient market. There was just so much opportunity for every non-profit to do better, so I spent the first 15 years or so in the C-Suite, either National Director of Develop or COO or doing something inside. But then when Bob and I got together, we realized that there is really this lack of operational competence within the entire non-profit communities. Not to say that there aren't some great non-profit, but in general, we're dealing with a group of individuals whose motivations are to do good in the world, and many of these folks did not come out of the disciplines that we're talking about. They came out of maybe social work, or in case faith-based, they came out of some type of ministry or faith-based training. What we try to do is use these backgrounds that we've had to bring everyone together so we can make greater impact, much greater impact together than just individually.

Andrew Olsen: Yeah, I was pretty stunned. I was on your website a couple days ago, and I don't remember, I think it might have been the About section, but there was a slide deck. One of the slides said something like there almost two million non-profits in the nation, and I think you guys said that over half of them don't work from a strategic plan, which just blew me away. Yeah. I know it happens, and Roy and I run into it all the time, but I didn't realize that it was that significant of a challenge.

Marc Stein: Yeah, I think the other things that was really important on that slide deck, Andrew, is that fact that most non-profit managers think they're more competent than they actually are. Now that's almost dangerous when you think about it because if you have someone that thinks they're operating at a high level of competency, and they're actually not, you have not only the opportunity cost of missed opportunity, but they're also operating at a substandard level. So, Bob and I started to talk about this, but as we were engaging others, practitioners and professionals and funders, the whole ecosystem came and said, "Yeah, we have ... We need a way to level up this level of competency." And in not just programs and management and accountability or finance and accounting, but across the board. That includes the marketing development and communications area.

Andrew Olsen: So that's interesting one. You guys talk a lot about best practices across organizations, and I think when I hear that, and Roy and I have done enough consulting together that we've banged our heads against the wall together and said, "Okay, there are best practices that are being missed in major gift development, certainly in direct response, in grant writing," but I don't spend a lot of time thinking about the other operational areas of a charity. Roy, I don't know, maybe you do in your new role at Mercy Ships. But talk to us a little bit about how improving best practices in those other areas also leads to organizations being able to raise more money.

Marc Stein: Well, I think probably the most obvious thing, as Bob had mentioned, is that funders are looking for more confidence in the non-profit's ability to deliver on their promises. Now that's just not in the fundraising area. They're looking at finance and accounting. They're looking at people in organization development. They want to see the competence, and it runs across the board. When it comes to program management and accountability, accountability and transparency are two words that we have heard so much of the last couple of year. There's a growing expectation by funders, and this is driven by major donors and foundations, primarily, to raise the overall competence of all of the organizations.

Marc Stein: We have one particular foundation that has, we'll just say, a large number of non-profits that they fund, and they really are concerned about the operational impact as much as they are the impact reporting that they're getting because they're concerned about sustainability of the organization.

Bob Lipps: Yeah.

Marc Stein: Go ahead, Roy.

Roy Jones: It really is about stewardship when you boil it all down together, and they want to make sure that their every dollar invested has a positive impact. It's interesting. I just can't get out of my head what Bob said early on about you guys creating this organization as a real center. At the center of both funders and non-profits to be a connector of the right kind of funders with the right kind of non-profits. Talk to me about how that works, what are the mechanics of that?

Bob Lipps: Yeah, great question, Roy, thanks. Early on, in our working together, we connected with our peers in the industry, whether foundations heads or high network individuals, fundraising consultants, CEOs, board members of all these organizations, and we got a clear picture that there's a gap in the connectivity of these organizations. Everybody is trying to good and connections are being made, but there's this significant inefficiency. As we sat back and said, how can we disrupt the current status quo of the whole non-profit industry? It's doing good things but sort of handicapped in certain ways. What's a way that we could bring together an efficient interaction between the non-profit funders and recognize experts.

Bob Lipps: We came up with the idea of helping either funders or board members or CEOs start with understanding where their organization is today. Having a clear objective picture of how well their organization is operating. To do that, we created a tool, it's an assessment tool, it's called OpX360. It stands for Operational Excellence 360. It covers all six areas of best practices that we talked about before. And it's a tool that can either be used by funders in cooperation with the C-Suite, or a board in conjunction with their CEO, or the CEO themselves can say to their organization, 'Look, we need to find out, based on industry standards, how well we're operating in any of these or each of these, all of these areas of best practices.'

Bob Lipps: The tool that we created, OpX360, will be available within the next few weeks. And an organization can go online, sign up, in any one or all of those six areas of best practices. There are 60 best practice statements in each of those six areas and they're divided into several key elements. A key element for finance and accounting might be: can [inaudible 00:15:43] management? Or internal and external audit. So OpX360 has these operational areas divided into key element or logical groupings of finance and accounting practically. And they're also identified as foundational practices or more mature practices, or practices that would demonstrate that an organization is running an optimized level.

Bob Lipps: It's a pretty simple, yet comprehensive assessment that the organization can take, anywhere from 45 minutes to an hour, they can get an objective report back at two different levels. We provide an executive briefing, that's a 28-page executive briefing. Then for the people who are really going to try to dive in and help improve their operations, we also provide an 80-page detail report which indicates every one of the best practice responses that they gave, a definition of what that best practice means, why it's important, potential consequences for not doing that best practice. And then a recommendation for how they could improve.

Bob Lipps: That's the tool that provides the gateway, the connectivity between funders and non-profits and business professionals that can help organizations.

Andrew Olsen: Bob, that sounds like a really cool tool. I haven't heard of anything else like that on the market. Is this a first of it's kind?

Bob Lipps: Great lead-in, Andrew, thank you. That's what we found, as well. And all of us, in any profession, are familiar with the term best practices, and even in the non-profit, faith-based or not faith-based, arena of non-profit, there are different areas the industry would say these are best practices. You might find them in finance and accounting to some degree, or there's governance and board development best practices. We've never seen all of the operational areas have a comprehensive set of best practices, that are all together in one integrated place. To date, and believe us, we wanted to invest our lives in something that was going to disrupt the environment in a positive way, and that wasn't someone else wasn't already doing it. To this day, we've not seen what we're doing anywhere out there.

Andrew Olsen: Prior to the online survey, I assume, interviews and written surveys, how did you conduct the assessment prior to the new tool?

Bob Lipps: A best effort in a non-integrated way. If we were to be contacted by a non-profit organization and they would say they made a self-assessment, informal or formal, and they say, 'we need need help doing fundraising, building a fundraising program' or 'we need help finding a new CFO' or 'we need help coming up with org governance rules' and so forth. We would respond singularly and go in, and on the assumption that we know what they're talking about, that either we at the Center, or through our network of recognized experts, we would come alongside and try to respond to their need. What we regularly find is that, what might be a concern to them on the surface, they may either have the right understanding or not, it may not be their problem, but we can come alongside and try to help them figure that out. More times than not, if we're called into help with something, and people in organizational development or fundraising or accounting, there are also other things going on in that organization that they quickly talk to us about, and then we can help connect them with specialists, professionals in those areas, as well.

Bob Lipps: But without really taking an initial assessment, it's difficult for the organization, or for us, to know where they stand. So the first thing that we do, in any one of these engagements, even before the online tool, was to go in and make an assessment, understand the lay of the land, and provide a report and then a recommended plan to move forward. With the assessment, we believe that the organization can take the self-assessment in any one or all of those areas, have a much more objective understanding of what their needs are, have a much more focused approach to finding professionals who can help them, rather than just wondering what their needs are. OpX360 is a great tool before an organization goes out trying to retain or do RFPs, find out an objective in a simple way, what the needs really are and then move forward.

Marc Stein: Yeah, you know, Bob, I'd like to add something to that. The way that this was built, it wasn't in a vacuum, it wasn't two smart guys just coming up with this idea. We reached, in all six areas of best practices, we reached into the best and brightest, the practitioners. If it was in finance and accounting area, we aligned ourselves with practicing CFOs, and then we talked with major finance and accounting firms and we had peer review. We really dug deep because I think that one of the shortfalls, even with the best consultant, is that you're limited to the person or the group of people that they are associated with, and in our particular case, we really wanted to see the perspective from all sides. We wanted to be able to see the practitioner side, in that case the CFO. We wanted to hear what the funder had to say. We wanted to hear what industry experts were looking for. And we brought them together in a way that would be wholistic.

Marc Stein: One of the things, especially both of you gentlemen know, is that most non-profits operate in a silo by design. That's how they stay on focus and on mission. If they're not on mission, then they'll chase, they'll be mission drift. They won't be able to do what they need to do. By design, we have narrow-focused our ability to come up with the best and most objective remedies to the problems within our organizations. What we attempted to do with this OpX360, was really to give 10x value across the board. You're going to get smarts that have been built into this assessment, the reports that you receive, that are not just going to be from one or two people, it's going to be from a group of folks that have looked at this from all angles. And we're going to help you understand which of the foundational competencies, like Bob was talking about, which are the mature ones, which ones are most important that you take care of now.

Marc Stein: Where do you start, what's next? We really wanted to put ourself into the seat, of that CEO or CFO or CDO, whatever that person is, because you can take any one of these assessments individually, so if I'm a CDO, I may want to take it just to see how I'm doing as a leader. Even without the rest of the organization taking it. Or if I have a small agency, I may only want to see a couple of them. But I think the more progressive and forward-thinking and really serious non-profits are going to say, 'you know, we really have to see how we connect to our departments internally, we have to see how connect with our funders, and the industry experts that help us.'

Andrew Olsen: You mentioned the smaller non-profits and then the larger, progressive- are there any non-profits that this OpX360 wouldn't be good for?

Marc Stein: I think OpX360 is taking the operational perspective regardless of size or flavor of what your cause is. There are larger organizations that will undoubtedly be much more inclined to be concerned about their mature and optimized levels of competency. Smaller agencies may be more concerned about fundamentals initially. But I think what the question really is: do you need to how you're operating right now? Do you need an objective look for someone to come in and say, 'this is how you're doing right now.' We don't see it so much as size-driven or specialty, as much as every organization has these six areas. They may not know it, but every one does.

Andrew Olsen: I think this is a really important point, almost a myth to debunk, because I know Roy and I live this all the time. So many charities that we talk to, when we say 'This it a best practice.' The response we get back is, 'Well, but you don't know my organization. I have different donors, I live in a different geography, people in an X-Y-Z town just don't behave that way.' All sorts of ideas like that. What I hear you saying is, put that aside, these six areas all have fundamental, regardless of size, sector, geography, best practices that, if not followed, could lead to failure. Did I catch that correctly?

Bob Lipps: Yeah, I think that's right. So smaller organizations might receive a different kind of benefit and might have a little different experience using OpX360, so a smaller organization or startup, OpX360 will provide a roadmap for them, so as they grow, as they want to operate with excellence, check off each one of those best practices that they're implementing. Some best practices take resources or time or support or money, but others are just smart things to do that don't cost an organization anything.

Bob Lipps: Larger organizations will use OpX360 to see how well they're really doing, not necessarily as a roadmap, because if they've been around for many, many years and they're into the tens or hundreds of millions of dollars, and they've got professional staff in every area, reality is that none of them are probably doing all of operational best practices. Even for larger organizations well-established, professionally staffed organization, there's going to be opportunity for them to say, 'Ah, okay! These are other areas where we can improve, fine-tune, operate better.'

Roy Jones: Are any of the non-profits that are using the tool- how does it help them with funders or donors? Are any using it for that purpose?

Bob Lipps: Roy, the tool OpX360's going to be released in the next several weeks, so currently, and in the past years, we've been administering the assessment on a manual, ad-hoc, interactive, consultative basis. The marketplace as a whole, has not seen OpX360 yet. But what they would do is, either at the request of a major funder, or their board, or their CEO, they would instruct somebody in the C-Suite, depending on which one of the areas of discipline it is, to go online, take the assessment, and then schedule a time with the C-Suite and review the responses. Along with that, one of the things we do is we've got a proprietary algorithm that looks at each one of these best practice statements and it indicates whether- and we've talked about this already- whether it's a foundational, mature, or optimized best practice, along with the type of practice it is, and we will provide the top three most impactful best practices that could be changed for each organization to focus on first.

Bob Lipps: Once they do that, they can come back to us. We'll share what we've observed to be the next three to five operational practices that they could improve that would give them the most impactful improvement, as well.

Bob Lipps: There was something we touched on before in- this is professionals like you guys in Newport One. You are out there talking with people in fundraising and marketing and communications arena. You're experts in those areas and people hire you for that. And they expect you to be excellent in that. And you are excellent in that. But today anymore, it's not just enough for each of us to be excellent in our own area of expertise, be really relevant and to bring value added to a non-profit organization or a funder. If we're able to say, 'yeah, you've engaged us for doing this,' we're doing it. I've also understood from our conversations that you've got needs in these other areas. And for you to be able to provide a connection for that non-profit with the need in other areas like legal or finance or people in organizational development... through a network like the Center that already has vetted, known, confident relationships really puts a feather in your cap, with respect to your clients or prospects. So that's a value added.

Bob Lipps: The other thing is we've heard from some of our recognized experts that having an independent assessment tool like OpX360 allows them to come alongside their prospect or client and say, 'Hey listen, there's this industry assessment tool that can help you in any one of these operational areas, you've engaged us to help you in fundraise, or finance or accounting. We can come alongside and guide you this assessment.' And it's helpful, in that you're not the one that's disclosing or shining a light on the inadequacies in this organization. It's the OpX360 assessment. So you don't have to look like that bad guy and it will provide an objective open path for you to see how you can really help them.

Andrew Olsen: For sure. I'm really excited about the launch of this. You guys said it's within the next month, right?

Bob Lipps: Yes, hopefully next week we're going to have it operational internally and we're going to be beta testing with some of our recognized experts and funders and non-profits.

Andrew Olsen: That's great. I think, if I'm not mistaken, you guys were going to also create a special, exclusive discount opportunity for our listeners, right?

Marc Stein: Yeah, that's right. Andrew, what we'll do is we'll provide you with a code to put in your show notes and anyone who uses that code will receive an immediate 20% discount and allows them to go in-

Marc Stein: The one thing I do want to share is that this particular assessment is- we have such confidence there that when someone takes it, we want them to know that we're standing behind every single one of these. So if it comes out and they are dissatisfied, I want them to pick up the phone and call me personally. I'm telling you, Andrew, if they're not happy, they get they're money back. But I think what's most important here is that your folks will have first access. The listeners of this podcast will be some of the first people to be able to do it and they'll get it with a discount.

Andrew Olsen: That's awesome. Really appreciate you guys doing that. I think this will bring so much value to the overall market and certainly to our listeners. Thank you again for making that available to them.

Marc Stein: It's truly our pleasure. We know, we've sat in those chairs. We know what it's like. We want to be able to help them as much as we possibly can.

Andrew Olsen: Cool. Hey, I want to shift this a little bit. Roy and I are always, when we have these conversations on our podcast, always looking for new insights and trend-spotting or new tips that our listeners can benefit from and implement immediately. What are you guys seeing across the market right now? What's the landscape look like from your point of view and is there anything that you would say, 'Hey, listeners ought to watch out for this,' or 'wow, there's a really big opportunity here?"

Marc Stein: Yeah, I think it's a really good question, Andrew. In the area of development, I think what we're seeing is a growing dissatisfaction among major donors and foundations with the type of communication they're receiving and not only the frequency, but the actual type of communications. So I think what we're seeing is that, what used to work was the value exchange of a normal non-profit with a funder has been very little expectation in area, value exchange. Basically the donor would give money to help a cause and many times that's where it would end. They may hear back, they may not. But I think folks are really starting to wake up and say, 'Not only do I want to know what the impact was, I want to know how the money was spent.' And that's why the operational perspective becomes so interesting. So we've really seen that. Maybe we've been focusing on it the last year, that we have seen this growing. Because we didn't see it before. Sometimes it takes fresh eyes to see these trends emerging. So I know that's one area that I've bumped into; it's not every day, it seems like many times a week.

Bob Lipps: I'll add to that, some other trends that we've seen are governments requiring more regulations. Increased fees and penalties for non-profits who don't comply with regulations. The ever changing environments, with respect to legislation and requirements makes an organization doesn't operate under best practice much more high-risk today than they have been in prior years. There's also a greater focus on outcomes. 100 years ago, organizations used to focus on what the cause was and donors would say, 'Oh, I love the cause of this organization' and want to fund it. Then as the world became more efficient and international and business-wise, donors say, 'Well, I like your organization but what all are you really doing? Talk to me about some details.' Then the shift we go from the type of cause to activities that organizations were involved in. 'We've got three thousand people around the world meeting with all of these different governments.' So they shifted from cause to activity.

Bob Lipps: And donors like- this was a little bit more specific- but as the world got more and more specialized, and donors got more and more business-like, it shifted from that now to hard outcomes. Show me the money, basically. Show me the outcomes. What can I buy with my dollars and I want to, not just hear stories about it, I want to see verified proof that my dollars are being spent for certain things that you say you're going to do and you're actually doing them. And that leads into another trend that we see. It's more of a third party verification, accountability-demonstrated outcomes.

Bob Lipps: The other trend, which your closer to it than we are at some point, is the greater need for active, real-time communications. It's not workable anymore for an organization to send out just a monthly newsletter or a quarterly newsletter or anything like that. The organizations who are really succeeding today and growing are into real-time communications at some level. And that requires technology experts and communications experts and social media experts, and so forth.

Bob Lipps: Another thing, another trend, is there is a continuing pressure on a P&L. In organizations, if they're not running efficiently, they're going backwards. And then lastly, Mark eluded to this, funders just want to be more involved. They not only want to have confidence in the organization, but they want more involvement. So the question is how and when do you do that? Those are some of the trends.

Andrew Olsen: That's a great list. I wonder, that last one makes me curious. Funders being more involved in an organization. If I'm leading an organization, I don't know if I see that as an opportunity or a threat, or maybe a combination of the two. If you could briefly, give us your point of view on what both the risk and the opportunity in that is.

Bob Lipps: You name the risk. Most non-profit organizations want to do their thing the way they want to do it. They have their own strategies and don't really want to have external pressures that can interfere or redirect them. That's the one risk, that's the downside. It takes a very careful approach to engaging donors without inviting donors to interfere with operations. So, there's that balance. And some organizations do that well. From my perspective, I would say most do not. They don't even go down that road. But an organization who is really growing and cutting edge will have a program, a plan, a strategy, an approach to donor involvement. And it's typically focused on the major or mega-donors and they provide a vehicle that has it's own boundaries and limits, where donors can speak into what the organization is doing. They can take some ownership of maybe some major projects. They are treated more like private equity investors, rather than people who are just writing checks to make charitable contributions. Those types of arrangements are the ones where we've seen personally that the organizations are growing. They've got major donor programs that are very effective. I don't know what you're seeing, but we're hearing that there's a lot of pressure on organizations who don't have really good major and mega-donor programs, because it seems like that's the area of growth going into the future.

Andrew Olsen: Yeah, we're seeing exactly the same thing. In fact, gifts below a thousand dollars are declining, as are the donors that give them. And Roy, you can probably talk more about this than any of us. But the real growth in revenue seems to be coming from people who are giving gifts of a thousand plus and even up into that ten, twenty-five hundred plus. Do you agree, Roy?

Roy Jones: That's right. I love the way you put it, Bob. Those five figure, six figure, especially seven figure donors that are out there, and when I look at this assessment, that's who I'm thinking about. Because I want to be able to show them the things that I'm doing right. And of course, we all need to sharpen the pencil and improve certain things where this tool could be very helpful. But I'm just thinking about how this as an independent, third-party source can demonstrate to some of my investors that they're making a good investment. And to me, I think that's got to be the most powerful result for me. Not just sharpening the pencil or making improvements, but in demonstrating what we're doing right to those mega and major-donors.

Marc Stein: That's right. You know, Roy, there's something to be said, first of all to examine yourself is a wonderful time to share with donors. That you're actually looking into this, that you're taking third-party perspective, you're learning about yourself, where you need improvement. And it gives you something to really talk about in substantive way. It also shows that you're aware that there are some things that you could be better at and that this is what you're doing to improve. Now, as a donor myself, that gets me excited, because it gets me thinking, 'they are thinking about these things.' To what Bob had mentioned earlier, I think it's been the sophistication of more and more individuals who start to become, who have really stepped into the investment role, who see how important it would be to have that same type of metrics and measurements moving into charitable contribution.

Marc Stein: In some of the things, like what we're talking about trends, we see more and more that donors want to be involved on the front end to talk about predetermined objectives. These are sophisticated individuals. They know that not every plan executes a hundred percent, but they also know a plan with good objectives that are commonly shared and there's a mutual responsibility, the chances of it being accomplished or closer to it, the accomplishment of it is a lot greater.

Marc Stein: There again, that's where it starts to raise the confidence level of your donor, where instead of giving you a six-figure gift, they'll ask you, 'if I give you a million dollars, what would you do with it?' Because you're giving me confidence that you are a thoughtful, accomplished professional and I know that I invest in you, I will see good return.

Andrew Olsen: Awesome. Well, gentlemen, we are just about at the end of our time together. Thank you again so much for being here. Really appreciate your time and appreciate the insights that you brought to the podcast.

Marc Stein: Well thanks, Andrew.

Bob Lipps: Thanks, Andrew and Roy.

Andrew Olsen: Before we let you go, if any of our listeners want to get in touch with you, what's the best way to do that?

Marc Stein: Probably the main website is the best way to go and that would be: the Global Center dot net, so www.theglobalCenter.net. If they're interested in the assessment: OpX360.com. That's O-P-X-3-6-0 dot com. We'd love to hear from anyone that would like to talk more about it. They can contact us directly.

Andrew Olsen: Awesome and we will post that twenty percent discount code in our show notes so that when they do go to OpX360.com, they can take advantage of that, as well, and be one of the first organizations to get in on the online assessment. Thanks again, gentlemen.

Bob Lipps: Great, thank you!

Marc Stein: Thanks, man!