

# COACH ON CALL

## INVEST IN YOUR FUNDRAISING CAPACITY

*Have you recently asked yourself any of the following questions?*

*"What fundraising efforts will yield the greatest return for our time?"*

*"How can I help my board members reach out on our behalf?"*

*"Will my appeal letter grab their attention?"*

*"What do I say to a prospective donor?"*

Cause Effective's COACH ON CALL program supports a select group of clients as they face these types of questions and more. Through this affordable package for one year of consulting services, you will retain Cause Effective's experienced and empathetic consultants as your own personal "on call" thought partners and trusted sounding board.

### COACH ON CALL'S CUSTOMIZED COACHING CAN INCLUDE:

- ▶ Feedback to help you get the most out of board meetings, donor gatherings, and event planning sessions
- ▶ Coaching for staff, board members, and volunteers
- ▶ Guidance on how to maximize your gain from special events
- ▶ Tips on encouraging board member accountability
- ▶ Review of emails, fundraising appeals or other documents
- ▶ Access to Cause Effective's library of templates, samples, and best practices



### HERE'S WHAT PAST COACH ON CALL CLIENTS HAVE TO SAY:

**”** The program provided me, as a Development Director, with the skills I needed to build our individual donor fundraising.

**”** The board fundraising training was excellent. Board members who attended are now fully engaged in fundraising!

**”** Cause Effective has served as a lifeline for me as a board chair.

#### COACH ON CALL BASIC

- UP TO 12 HOURS OF CUSTOMIZED COACHING
- 1 IN PERSON BOARD-STAFF TRAINING
- \$2,500

#### COACH ON CALL PLUS

- UP TO 30 HOURS OF CUSTOMIZED COACHING
- 1/2 DAY BOARD-STAFF RETREAT
- UP TO \$6,000

Both packages include access to peer-to-peer roundtable discussions, and CE's vast resource library of templates/tools!

**INTERESTED?** Please contact at [consulting@causeeffective.org](mailto:consulting@causeeffective.org) or call 212-643-7093

## Coach On Call Frequently Asked Questions

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**Coach On Call** offers flexible, customized assistance on an as-needed basis to a select group of non-profits for an annual discounted fee. In essence, we are your on-call fundraising coach, bringing you a service that nearly every national charity uses, but at a fraction of the price.

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### What is the value of coaching?

One of the greatest strengths that Cause Effective consultants offer is the ability to get into the trenches with you. We brainstorm and troubleshoot on the big picture goals, help hone them to manageable to-dos, and then provide coaching on how you can bring your plans to fruition.

### What does the Coach on Call program provide?

**Coach On Call Basic** provides up to 12 hours of customized consulting assistance annually, in a variety of forms – over the phone, in person, or via email – plus an additional in-person board/staff training on a fundraising or governance topic of your choice. The program also provides opportunities to participate in special group activities, such as roundtables and webinars on topics relevant to members. You will receive access to Cause Effective's extensive library of materials and templates, in electronic as well as print format.

### What is Coach on Call Plus?

**Coach on Call Plus** provides all of the above, plus more support such as a board-staff retreat or additional training time, customized to your organization's needs.

### What are some examples of how Coach On Call can help?

- ⇒ **Individual Donor Development:** starting an individual donor program; planning and implementing an annual giving campaign; strategizing on reaching a major donor prospect; creating successful annual appeals
- ⇒ **Boards of Directors:** increasing board involvement in fundraising; addressing governance issues such as leadership transitions, founder's syndrome and overall board engagement; activating a board nominating or governance committee
- ⇒ **Strategic Use of Special Events:** planning successful special events that reach your fundraising goals and build support year-round
- ⇒ **General Fundraising:** creating an annual fundraising plan; diversifying funding sources, relationship dynamics

### How much does the program cost?

- ⇒ The cost of **Coach On Call Basic** is \$2,500 per year.
- ⇒ The cost of **Coach on Call Plus** ranges from \$4,000 to \$6,000 per year in a package that will be customized to create maximum impact for your organization.

## When and how do I sign up?

You can become a member at any time, but we encourage you to join at the program's start (January) to gain the greatest benefit of support received from your peers over time.

**Do funders ever pay for this program?** Often, funders, board members or even individual donors will cover the cost of working with Cause Effective. They appreciate how an investment in our assistance can leverage much greater support in the form of more donations. We are happy to review those opportunities with you.

**How can we make the best use of the time?** Cause Effective will begin the program with you by setting a range of mutually agreed upon objectives and benchmarks. You will be assigned a primary consultant who will serve as your *proactive* partner in helping you meet those goals, touching base with you at least monthly to check in and help keep you on track. As with all Cause Effective clients, you will also draw on the full breadth of expertise offered by the entire Cause Effective team.

**What if we need more time than the Coach On Call program allows?** If at any time you decide that you would like a more in-depth consultancy, you can add to your **Coach On Call** membership in one of two ways:

- ⇒ A full consultancy contract – for individual donor development, board governance, board fundraising engagement, and/or special events or anniversary campaign planning
- ⇒ Add work with Cause Effective on an hourly or per job basis (for example, for focused special event support or more extensive assistance in another area).

Organizations looking for an in-depth consultation with on-site board and staff training should have a conversation with us about other ways to engage with Cause Effective. **Coach On Call** may not meet those needs. However, we can start with a **Coach On Call** relationship and add to that as circumstances and funding

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## What are some Coach on Call success stories?

- ⇒ A board member was asked to visit a major donor prospect for the first time. Cause Effective provided talking points and worked with the director on the phone to walk him through the thinking and practical aspects of that visit. **Result:** A \$10,000 first time gift
- ⇒ A Director of Development wasn't sure how to work effectively with her board fundraising chair. Cause Effective provided coaching support to help her understand the power of secondary influence so that the board began to feel ownership. **Result:** A 75% increase in special event revenue
- ⇒ An Executive Director wanted to increase board-wide giving. Cause Effective provided board governance samples, and templates to support the board adopting its own fundraising commitment form. **Result:** A 100% giving policy, with a five-fold increase in board giving

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Cause Effective has over 35 years of nonprofit expertise, working with a wide range of organizations to help them raise long-term, sustainable resources. We have worked with many nonprofits in this current economy to make sure that their fundraising efforts are achieving all they can.

Our goal is to help you transform how your organization approaches resource development. As a nonprofit ourselves, we understand the unique demands that nonprofits – and those who work in them – face. We are experts at assisting nonprofits to envision and create lasting change.

Call or email us at 212-643-7093 or [consulting@CauseEffective.org](mailto:consulting@CauseEffective.org) to learn how you can invest in your fundraising capacity.