

DONOR RELATIONS FUNDAMENTALS

POSITION YOURSELF AND YOUR
ORGANIZATION FOR SUCCESS



AGENDA

- Donor relations and the ask
- Donor relations once the gift comes in
- Common challenges

THE CHRONICLE OF
PHILANTHROPY

New Research Sheds Light on Bequest Giving

By Paula Wasley

NEW ORLEANS

“Among the [motivations in making charitable gifts or bequests] cited by the groups were a desire for personal benefits or gain in prestige, **the perceived efficiency or professionalism of an organization,** or a wish to make a difference or leave a legacy.”

THE CHRONICLE OF
PHILANTHROPY

“...many participants said that **the quality of communications they receive from an organization influences their decision to give.** To capture those donors, he said, nonprofit groups need to make a concerted effort to differentiate bequest donors from others by **treating them with extra care and communicating with them frequently.**”

Emphasis added

DONOR RELATIONS AND THE ASK



DONOR RELATIONS AND THE ASK

How you ask for funds establishes the terms on which your relationship with a donor is based, and the place from which it will grow.

SELL YOUR VISION AND THE WAY YOU PURSUE THAT VISION

- Have a clear picture of what you want to accomplish
- Communicate the vision, the mission, and the activities to donors consistently and clearly
- Give your donors an opportunity to buy into the mission and be part of the vision as friends and allies

SELL YOUR VISION AND THE WAY YOU PURSUE THAT VISION

- Mission statement meetings
- Sit in on program meetings and read program team update emails
- Don't be afraid of providing feedback internally
- Bring program people into development

UNDER PROMISE AND OVER DELIVER

- Set goals high, but communicate them in a way that leaves you room to wow your donors
- Use measurables and metrics wisely
 - Respect donors' requirements
 - Understand each other
 - Discuss if needed
 - Be prepared to say “no thanks”

DONOR RELATIONS WHEN THE GIFT COMES IN



THANK YOUR DONORS!

- Thank you letters – keep them fresh, send them promptly
- Thank you (only) calls – call new donors and donors at certain levels of support
- Don't become rote or mechanical in your thanks

THANK YOU CARD—SHOWING IMPACT



Regino Soriano
IJ economic liberty client



Carole Hinders
IJ property rights client

Your support of
the Institute for Justice changes
the lives of real people.



Mary Lou Wesselhoef
IJ free speech client



Faith Perry
IJ school choice client

THANK YOUR DONORS!

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TRACK YOUR PROMISES

- Respect restricted support
- Follow through on commitments made
 - Thank you notes after all meetings
 - Notes about what happened and key take-aways
 - Task up reminders
 - Database
 - Calendars
 - Tasks
 - Semi-annual (or more often) review of donors

File

Event

Insert

Format Text

Review



Save & Close



Delete



Calendar



Forward



OneNote



Appointment



Scheduling Assistant



Online Meeting



Invite Attendees



Show As:

Free



Recurrence



Time Zones



Categorize



Private



High Importance



Low Importance



Zoom



Zoom

Actions

Show

Online Meeti...

Attendees

Options

Tags

Zoom

Subject: July Action Items

Location:

Start time: Sat 7/1/2017

12:00 AM

 All day event

End time: Sat 7/1/2017

12:00 AM

Proposals

- Moneybags Foundation proposal due October 15 (see "Moneybags" email attached)
-

Reports

- Send update to Sam Smith about his restricted donation from August 2016

Individual Solicitations

- Annual requests to Johnson, Brown, and Hendricks
- Request from Chip to Jones per his August meeting (see "Jones" email attached)

Calls/Emails

- Call Henry Smith about lunch (**Forward to next October**)

Other

- 4PS/Charitable Gift Annuity management: Annual report to New Jersey on our CGA due by the end of the month, if not done already. **Forward to next year.**
- Still need meeting with Henry Smith, Jr.?



Meeting with Jones



Moneybags Fndt

File Task Insert Format Text Review

Save & Close | Delete | Forward | OneNote | Task | Details | Mark Complete | Assign Task | Send Status Report | Recurrence | Recurrence | Categorize | Follow Up | Tags | Private | High Importance | Low Importance | Zoom | Zoom

Subject: (JOHN SMITH ESTATE) Call attorney again to check on status

Start date: Thu 9/25/2014 Status: Not Started

Due date: Mon 6/6/2016 Priority: Normal % Complete: 0%

Reminder: Mon 6/6/2016 8:30 AM Owner: Melanie Hildreth

3/13/17 – No check; called to follow up and left a message.

2/27/17 – Called and talked to atty. He said he is just dotting i’s and crossing t’s and will send the “Declaration of Completion” next week—we will get \$5,000.

1/22/17 – Called just now. After I gave my name the secretary said “he just got in, and is in a conference now.” She asked for a number for him to call back.

11/5/16 – Called attorney’s office and left a voicemail.

7/21/16 – Spoke with attorney. He’s still waiting on some late tax documents and is planning to follow up this week. He hopes to have everything wrapped up and done in a month or two max.

4/20/16 – Home and items have been sold. Attorney is waiting on donor’s personal rep to file taxes. Once he has that he can begin disbursement and will be in touch with us shortly after that.

12/21/15 – Waiting on antique dealer in big city to give price on remaining items.

7/1/15 – Had tried to do a short sale but the bank wanted the house, so that process is still going on. As of this conversation will be “foreclosed in 60 days” so we should hear something in the fall. Only thing left to sell was some antiques, which was happening this weekend.

1/28/15 – house still in foreclosure...will be a distribution but waiting on the bank. Mentioned the retirement account and a watch and “other

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FOLLOW THE MR. ED RULE

People yakkity yak a streak
and waste your time of day
But Mister Ed will never speak
unless he has something to say.



SAMPLE MAIL CALENDAR

9/2/15	Fall appeal lead email
9/14/15	Donor survey reminder letter
9/15/15	Fall appeal
9/29/15	First Gala event Save the Date
10/1/15	October newsletter
10/1/15	Giving Club cultivation event
10/9/15	Donor bounced email RFE
10/19/15	Fall acquisition
10/21/15	Legacy Society marketing mailing
11/10/15	EOY appeal lead email
11/25/15	EOY appeal (including special Giving Club appeal)
11/30/15	EOY high dollar prospect appeal
12/1/15	December newsletter
12/3/15	EOY solicitations
12/10/15	Holiday cards
12/16/15	EOY appeal chase email
January 2016	Possible second Gala event Save the Date
1/15/16	Monthly and periodic donor statements/cultivation
1/22/16	Giving Club event

LISTEN TO YOUR DONORS

Survey Type	Paper Count	Online Count	Total Received	# of Surveys Mailed	Email Only	Total invitations	Response Rate
Legacy Society	118	32	150	223	1	224	67.0%
Top Level	78	11	89	258	5	263	33.8%
Mid-Level	217	48	265	742	4	746	35.5%
Monthly	115	24	139	301	12	313	44.4%
Current Low-Dollar	1,730	224	1,954	6,214	52	6,266	31.2%
Lapsed, Low-Dollar	208	24	232	2,071*	36	2,107	11.0%
Totals	2,466	363	2,829	9,809	110	9,919	28.5%

- Survey tips:
 - Anonymity is important
 - Prime the pump (pre- and post-letters from the president)
 - Consider paper
 - Keep it short short SHORT

COMMON CHALLENGES



COMMON CHALLENGES

- “No,” decreased support, or no response
 - Don’t take it personally until you know it’s personal
 - Identify the problem and seek to understand where they’re coming from
 - Don’t be afraid to call and say thank you, and how much you value their support, and to ask if there is anything about the organization or its work that informed their decision this year

COMMON CHALLENGES

- What if you have bad news?
 - Don't hide your losses
 - Donors should hear bad news from you first
 - Objectively present the grounds for the loss
 - Explain what your next step is—there is always a next step!

QUESTIONS AND COMMENTS

