CULTIVATING A CULTURE OF CARE

ADRP ANNUAL INTERNATIONAL CONFERENCE

Minneapolis 2023
Activity: Dinner Party
Activity: Dinner Party

My title is ______________

But what I really do is ______________
Session Overview
Session Ground Rules

- Participate at your own comfort level.
- Ask questions as they occur to you now.
- And/or send them later:
  - Mark: mark_lanum@brown.edu; (note underscore between “mark” and “lanum”)
  - Jen: jenmcg@mit.edu;
  - Eliza: emcnulty@stanford.edu.

- What is learned here, leaves here; what is said here, stays here.
Session Overview

• Donor Relations as a Profession

• Stewardship, Donor Relations, and Engagement Program Fundamentals

• Influencing and Leading in Your Role
Donor Relations as a Profession
Donor Relations as a Profession

What

Donor relations
Stewardship
Engagement
Donor Relations as a Profession

When

---

The Virtuous Circle

- **Ask**: She gives a gift and feels great.
- **Thank**: She knows gift was received and appreciated.
- **Report**: Sees how her gift made a difference.
- **Repeat**: She feels great, trusts your organization, and is more likely to give again.

But she still doesn’t know if her gift made a difference.

But she doesn’t know what’s going to happen.
Donor Relations as a Profession

Where

“Here you are, Simmons!”
Donor Relations as a Profession

Who

ADRP Membership Growth

2012 to 2023

Start: 1,169
Now: 2,037
Donor Relations as a Profession

Who

- Acknowledgment: “Thank you”
- Recognition: “You are special to us”
- Communication & Engagement: “You matter beyond your giving”
- Impact Reporting: “You make a difference”
- Accountability, Compliance, & Fiduciary Responsibility: “You have our respect”
Activity: A perfect fit
Activity: A perfect fit

What are the characteristics of an awesome donor relations professional?
Program Fundamentals
<table>
<thead>
<tr>
<th>Our good work says (action)</th>
<th>So that donors feel (reaction)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Thank you</td>
<td>Appreciated</td>
</tr>
<tr>
<td>You are seen; You have our respect</td>
<td>Honored</td>
</tr>
<tr>
<td>You make a difference</td>
<td>Significant</td>
</tr>
<tr>
<td>You matter beyond your giving</td>
<td>Valued</td>
</tr>
</tbody>
</table>
The 4Rs of Cultivation

- **Research** (25%)
- **Romance** (60%)
- **Recognition** (10%)
- **Request** (5%)
“The stewardship phase should feed back into cultivating the donor for a future ask…these phases are about engaging the prospect/donor in the institution. Donors who only hear from the institution with financial requests disengage quickly.”

From CASE Fundraising Fundamentals, Part 2, Section 7
Facilitating engagement
Building trust and ensuring transparency
Showing impact
Providing recognition
Conveying gratitude
Conveying Gratitude

+ Objectives
Affirm understanding of gift intention
Foretell impact

Guiding Principles
Short and sweet
Prompt and poignant
Singularly focused on the donor and the gift (*not an ask for more*)

Considerations
Author
Format
Not just for gifts
Providing Recognition

+ Objectives
Demonstrate that they are valued members of the community

Guiding Principles/ Common Practices
Giving Societies
Named Spaces
Donor Profiles
Invitations/special communications

Considerations
Donor Expectations
Proportionality
Donor Preferences
Institutional Culture
Showing Impact

+ Objectives
  Accountability
  Storytelling

Guiding Principles/
Common Practices
  Narrative reports
  Infographics
  Events

Considerations
  Format
  Timing
  Multipurpose content
# Building Trust and Ensuring Transparency

**Objectives**
- Confirm use of funds
- Affirm alignment with intent

**Guiding Principles/Common Practices**
- Endowment/financial reports
- Gift agreements
- Gift acceptance (and other) policies

**Considerations**
- Format
- Timing
## Facilitating Engagement

### Objectives
Reinforce shared interests and partnership by providing opportunities beyond giving

### Guiding Principles/ Common Practices
- Interaction with beneficiaries; special invitations
- Providing input
- Volunteer roles
- Individualized stewardship plans

### Considerations
Deep understanding of donor motivations, interests, and goals
“Our findings indicate that the biggest differentiators between donors who had weak and strong relationships centered around the notions of feeling valued and involved.”

Listen Up! The Nonprofit Marketer’s Guide to What Donors Want
Activity: Strengths and Challenges
Evaluating your efforts

FIVE QUESTIONS | Does it…

1. Create a gratifying gift experience?
2. Inspire increased giving?
3. Help raise major gifts?
4. Help secure more first-time donors?
5. Increase donor retention

Output vs. Outcome
Finding Inspiration

Best practices

Benchmarking

Adopt, Adapt, Admire
Finding Inspiration

Outside of Donor Relations

Books, Podcasts

Corporate

Adopt, Adapt, Admire
Leading and Influencing
You as a Leader
You as a Leader

What is your leadership “calling card?”
You as a Leader

Competence v. Authority v. Character
Oversimplified Guide to Leadership

**Authority**
- Permission (formal or informal)
- Position
- Influence/Status

**Competence**
- Skills
- Knowledge
- Experience

**Character**
- Values
- Standards / Expectations
- Charisma
Engaging Your Leaders
Engaging Your Leaders

Thinking like a leader
Engaging Your Leaders

Strategy v. Activity
Engaging Your Leaders

Communicating with / presenting to leadership
Collaboration as Influence
Collaboration as Influence

Invitation v. Request v. Requirement
Collaboration as Influence

Winning by Listening
Collaboration as Influence

Responses = “Collegial Stewardship”
Collaboration as Influence

Follow-through is a career builder
Closing Activity
Activity: Dinner Party

Has your answer changed?

My title is _______________

But what I really do is _______________