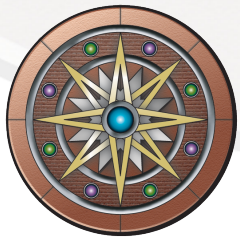


Things Every Donor Relations Professional Should Know



heurista
Creative discovery for complex projects

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Discussion-based Research Project

1. Survey of seasoned professionals within the ADRP ranks – 12 responses
2. Toronto ADRP Regional –April 2016
3. Birmingham ADRP Regional – June 2016
4. ADRP Webinar–August 2016

What do you hope to take away from today's conference?

Who is your mentor and how did you meet this person?

List the things most important for any donor relations and stewardship professional to know.

Professional Skills

- Data, report specification, analytics experience (8)
- Show your value/ask for a seat at the table (7)
- Relationship building skill (ability to know your donor) (6)
- Influence/ability manage up and collaborate (5)
- Strategy, process & project planning/management (4)
- Writing skill, acknowledgements & reports (3)
- Creativity for solving complex problems (3)
- Fundamentals of fundraising training (4)
- Awareness of industry best practices (3)
- Gift processing experience (3)
- Event planning/management experience (2)
- Natural talent for showing gratitude/graciousness (2)
- Networking skill/ability to recall names/introduce others (2)
- Flexibility/versatility in regards to challenges (1)

Professional Skills

- Critical/analytical thinking
- Ability to quantify and measure your work
- Ability to specify reports and work with/analyze large volumes of data
- Ability to automate/streamline/standardize
- Creativity to find solutions to complex requests
- Confidence to represent the institution to the donor and the donor to the institution
- Confidence to claim a place at the table and demonstrate your expertise
- The ability to discern or research what donors actually want

Knowledge

- Donor Bill of Rights
- Policies & Procedures specific to your organization
- Institutional strategic priorities
- Best practices within the industry
- Best practices within your set of peers
- Donor statistics specific to your organization
- Donor motivations specific to your organization
- Specific information about individual donors, as needed

The most important question
you can ask is
WHY?

Simon Sinek TED Talk:
Start with Why

Advice

- I would tell my younger self to approach every project or issue with a positive attitude and a creative spirit, always looking to build on previous relationships or repair those that have been strained. It is not possible to make everyone happy all the time, but as long as you strive to do what is right – for you, the institution, and the donor – your work will be appreciated and will surely make a difference.
- Don't let challenging personalities affect your work.
- Think about what will be important 5 years from now.

Advice

- Ask lots of questions, learn your organization, and don't assume anything (positive or negative).
- Focus on developing both technical skills and the professional presence needed to effectively represent the donor relations perspective.
- Assume your decisions are the best anyone would make when faced with the same circumstances.
- Stick with your decisions long enough to become convinced they were right or wrong.

Advice

- You can't do everything all at once and sometimes you just can't do what's asked.
- It takes time to build a donor relations program and you must do it methodically.
- Choose your areas for success or improvement, and make sure each one is institutionalized and running well before taking on more.

Advice

Never forget that your role at your institution is as important as the role of the frontline fundraiser. You are responsible for maintaining the donor relationship, even if you don't know the individual donor. You are a co-owner of that donor and all donors. The frontline fundraiser will never get back in the door for the next ask and gift if you aren't right there standing beside them, assisting them, keeping the donor informed and feeling appreciated.

Advice

It can be discouraging sometimes to know that the person making the ask is paid more than you or gets more recognition, but take solace in work well done and the important contribution you make to bringing in every gift – and in the knowledge, I believe, that the trend is starting to change, with more recognition coming the way of donor relations professionals.

For Discussion

“It’s all about the donor;
put yourself in the donor’s shoes.”

VS

“It's not the thing you do
(letters, reports, etc) but why you do it
(to increase retention and upgrade).”

Thanks for your
contribution to this project!

Please email
your notes from today's discussion
and any other thoughts or feedback to:

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