

INTEGRATING DONOR RELATIONS AND FUNDRAISING OPERATIONS: A CRITICAL BALANCE

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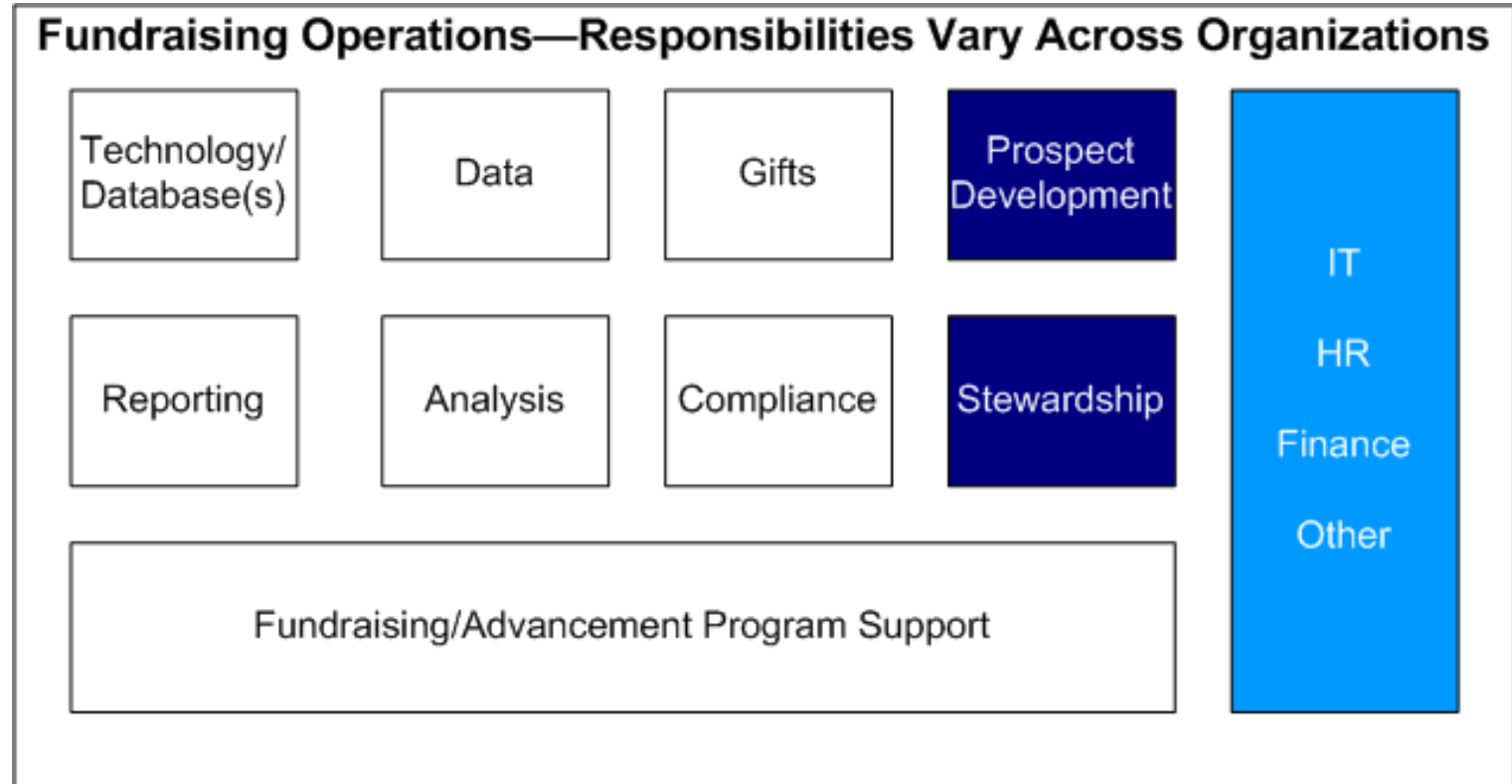
Focus and Goals

- Donor relations requires detailed attention to individuals and organizations
- Fundraising operations—data, technology, reporting, and key processes—should provide a supportive environment for donor relations
- Even the best shops can struggle with this partnership, so let's cover the top 10 tipping points
- This discussion provides post-session road map to assess and improve the balance between donor relations and operations.

My Framework

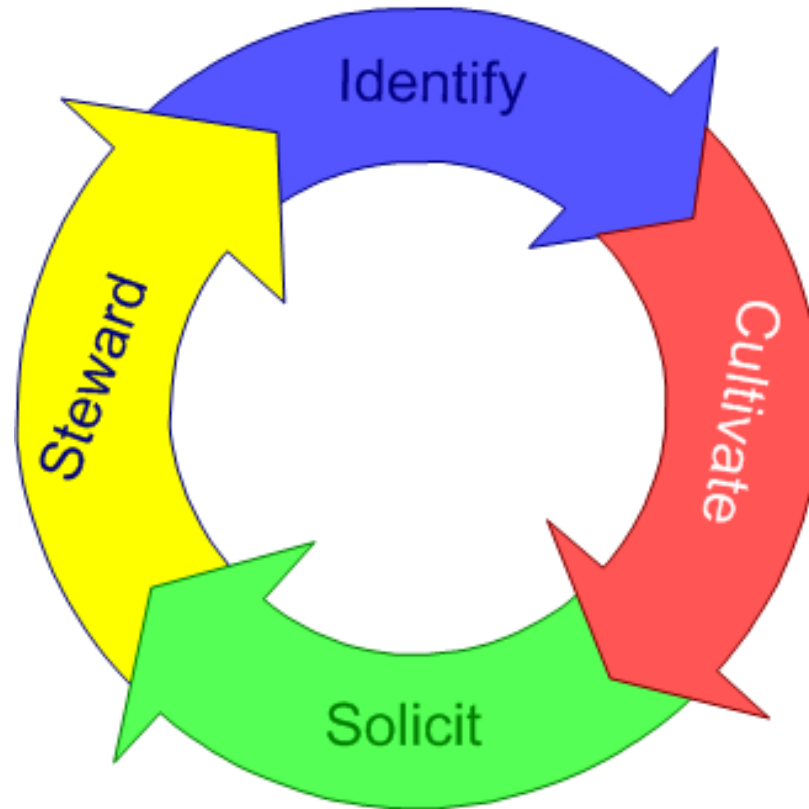


My Framework



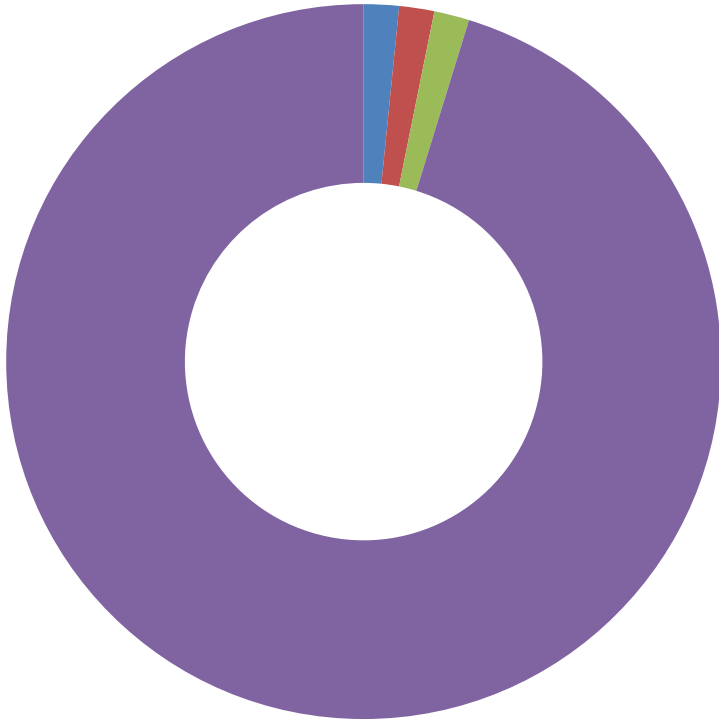
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Another Common Framework



A Donor's Framework

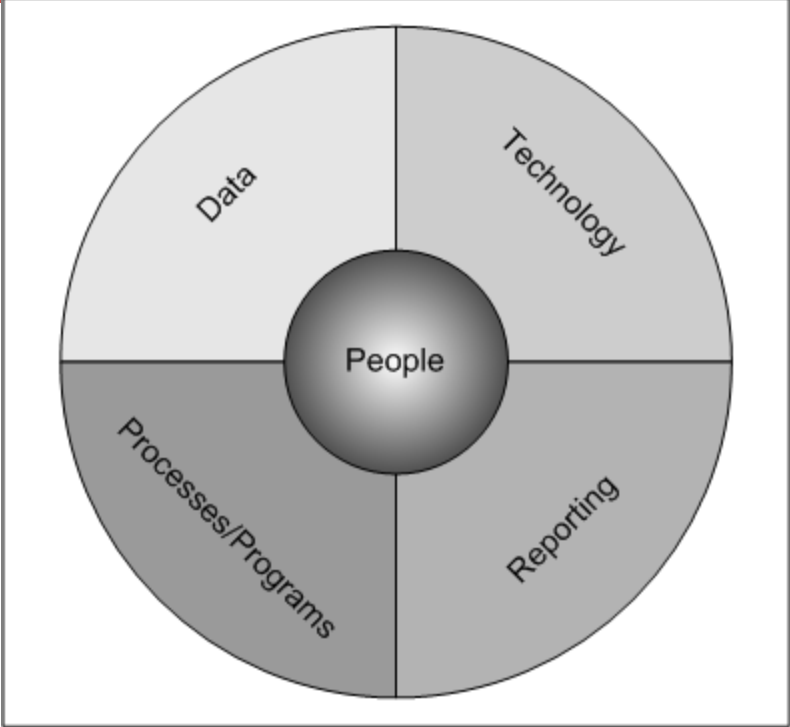
Donor Relationship



■ ID ■ Cult ■ Solicit ■ Steward

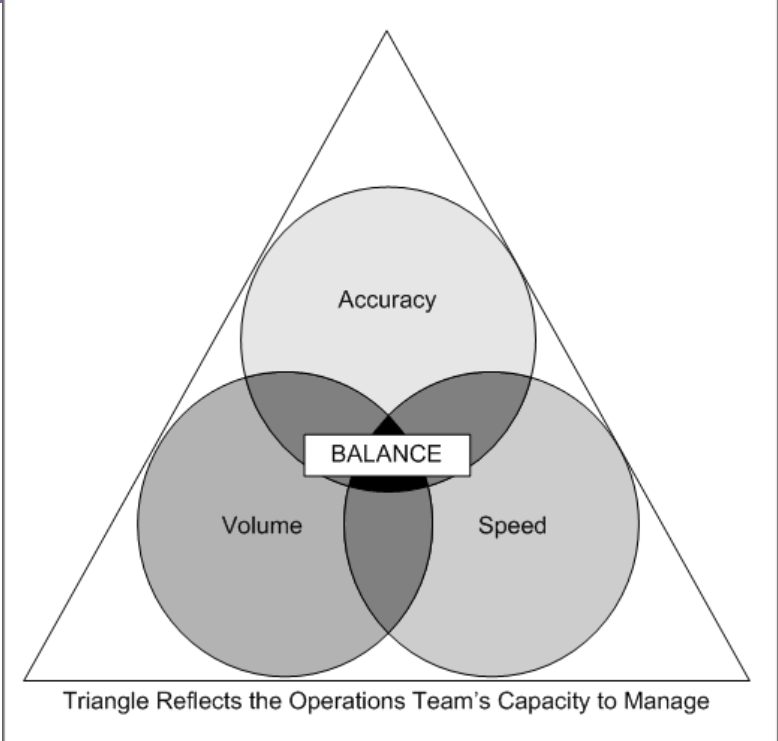
Dynamics of Operations

The Spinning Top



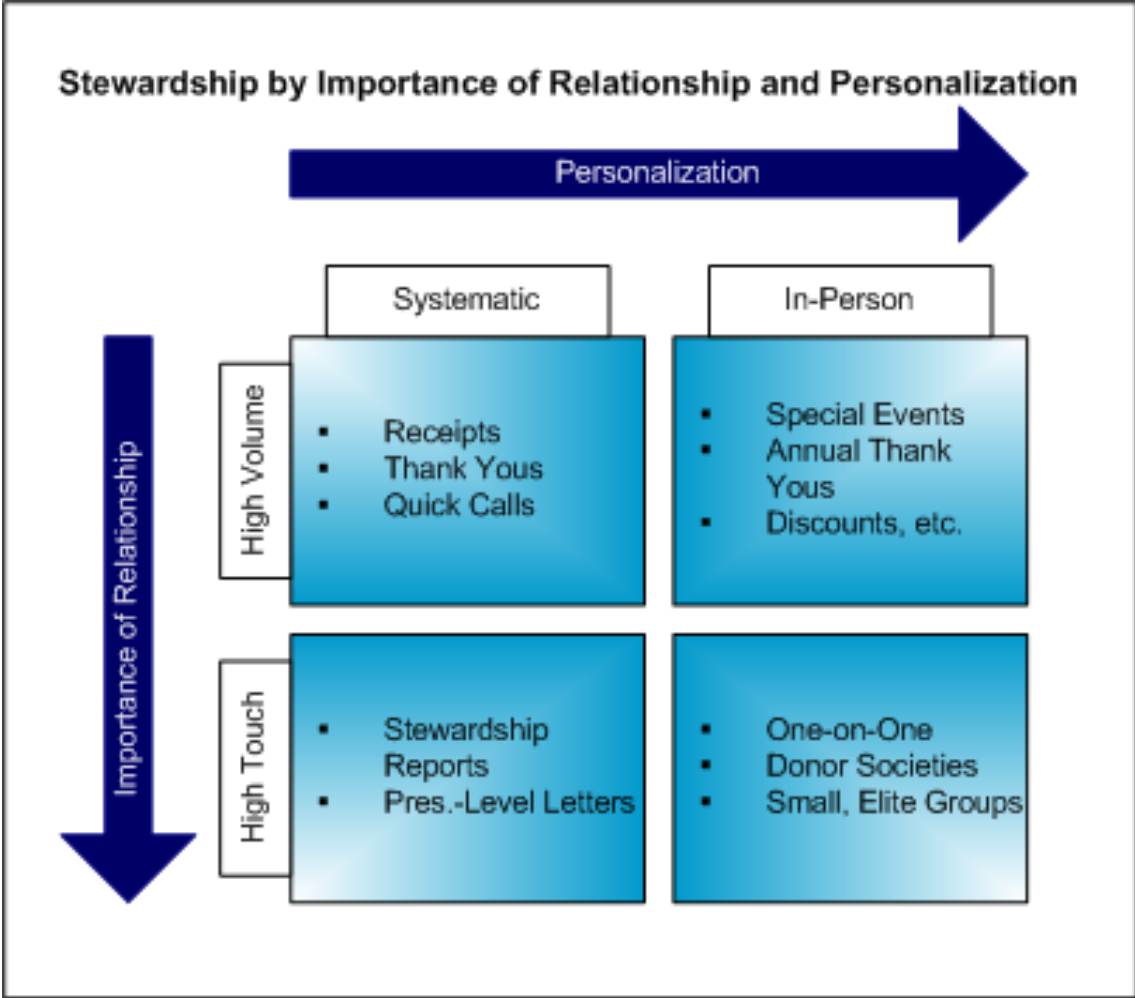
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The Bermuda Triangle



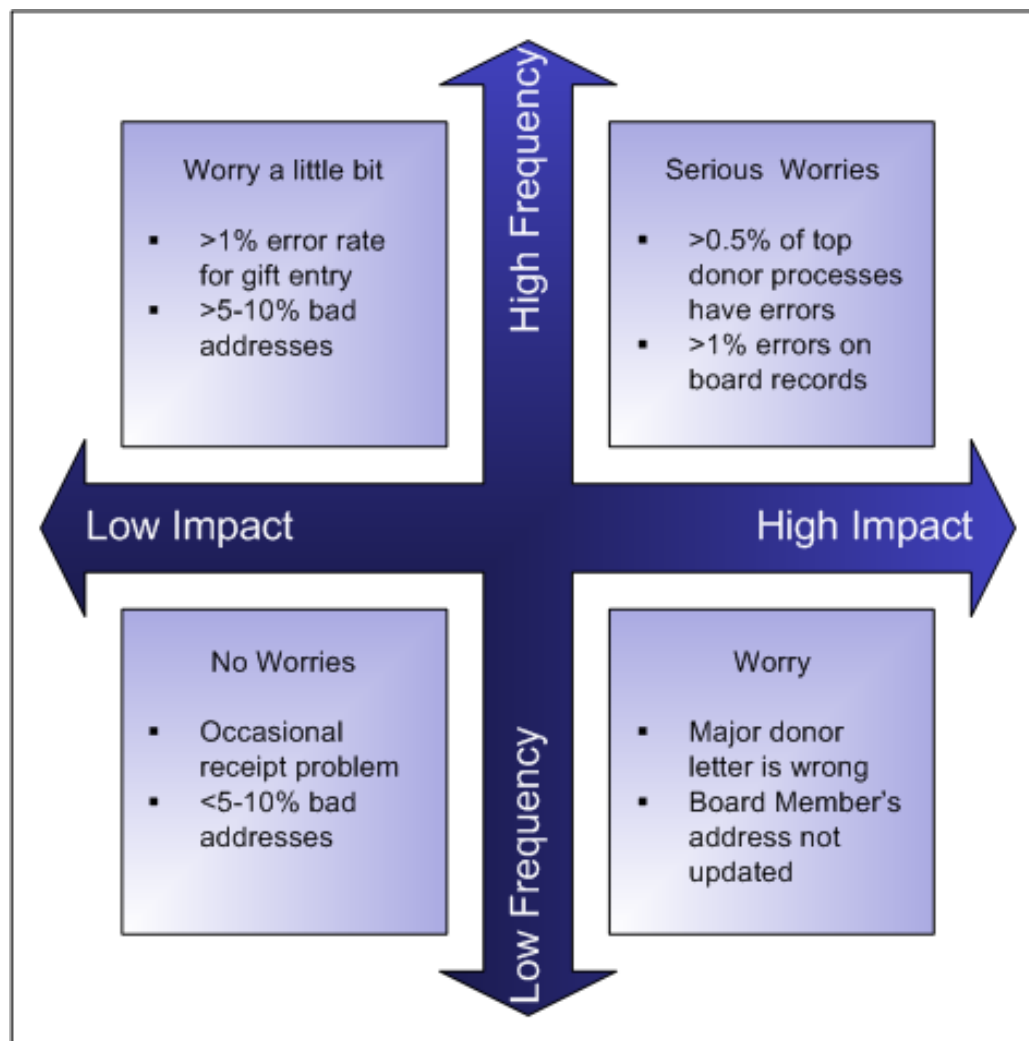
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Baseline for Stewardship



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Baseline for Balance: Impact & Frequency



Top 10 Tipping Points

- 1) Data
- 2) Technology
- 3) Online engagement
- 4) Reporting
- 5) Receipts & acknowledgments
- 6) Impact reporting
- 7) Prospect development
- 8) Recognition
- 9) Exception management
- 10) Front-of-the-line

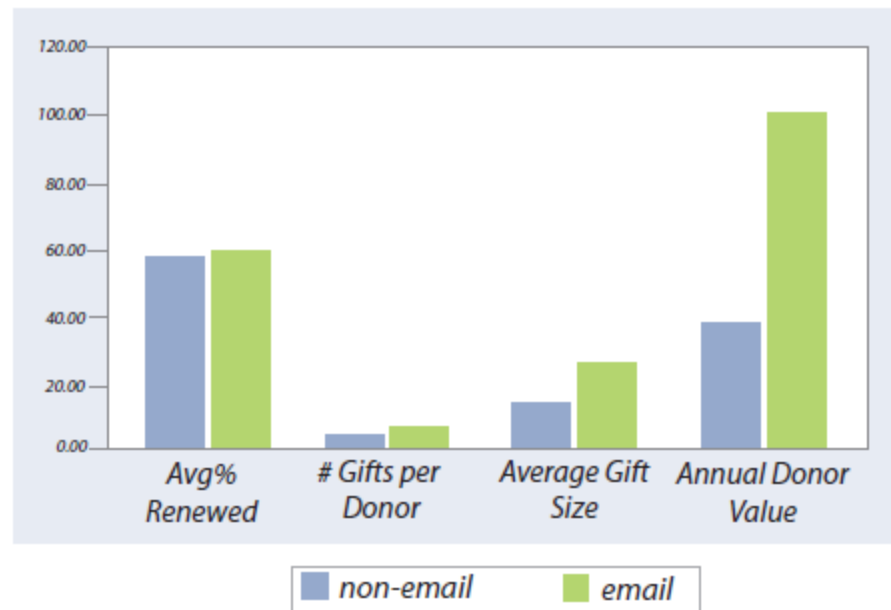
Data

- Can we contact our donors?
 - ▣ Address, email, and phone standards
- When we do so, do we contact them accurately?
 - ▣ Addressee and salutation
 - ▣ Relationships
- How many vantage points do we track?

Data (cont.)

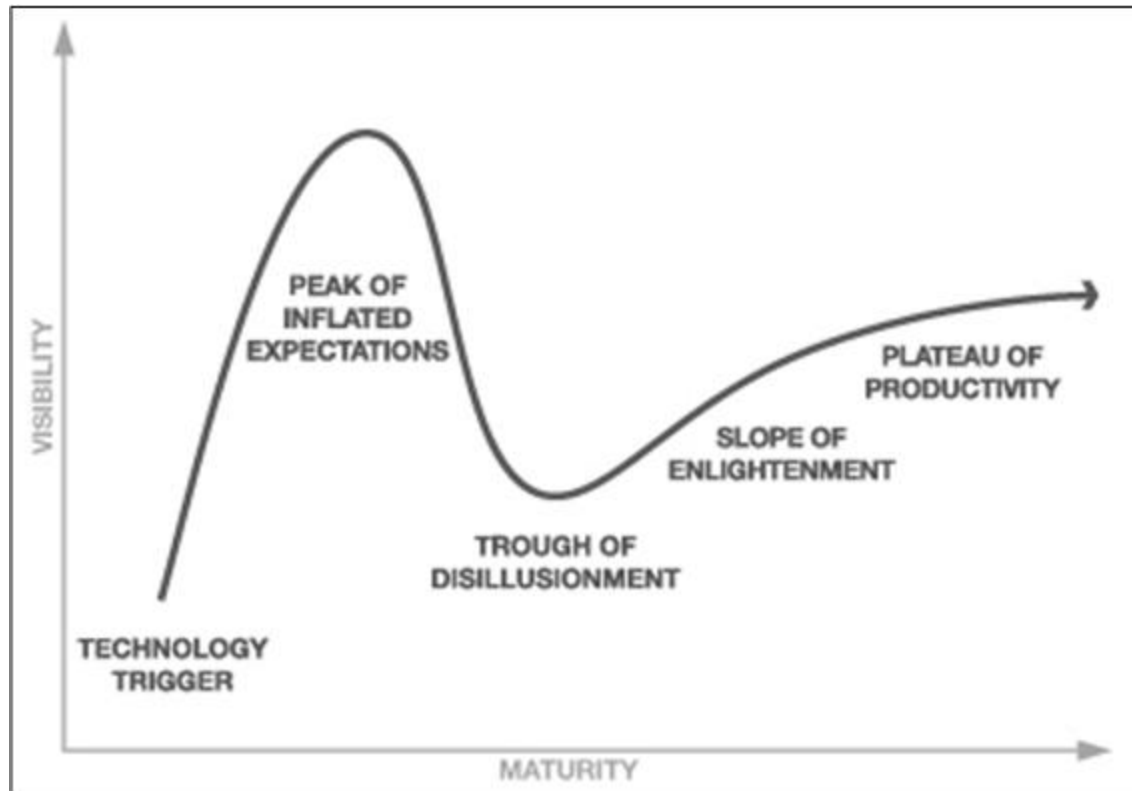
- And, some data matter more than others...

Key metrics for 2010 donors



Technology

Challenge with databases: inflated expectations



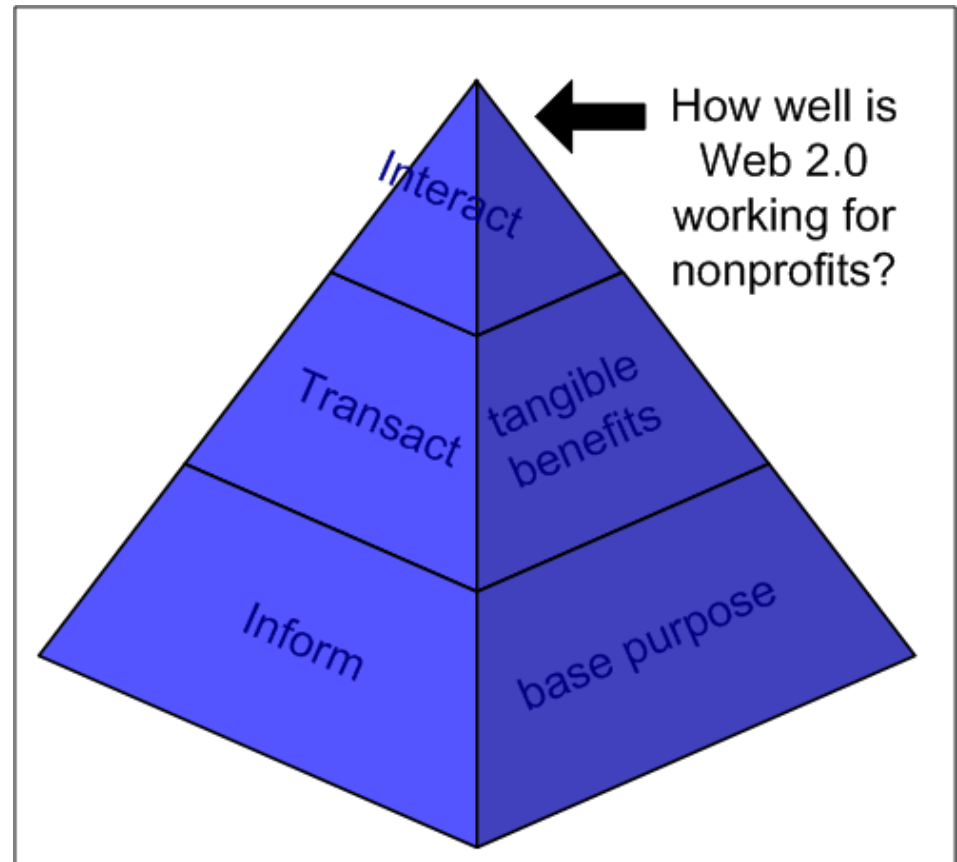
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Technology (cont.)

- Donor database
- Online community
- Word processing
- “Impact” detail database

Online Engagement

- Huge potential
- Ownership and application
- Some great leverage of these resources
- Still, many not successful moving donors up the pyramid



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Reporting

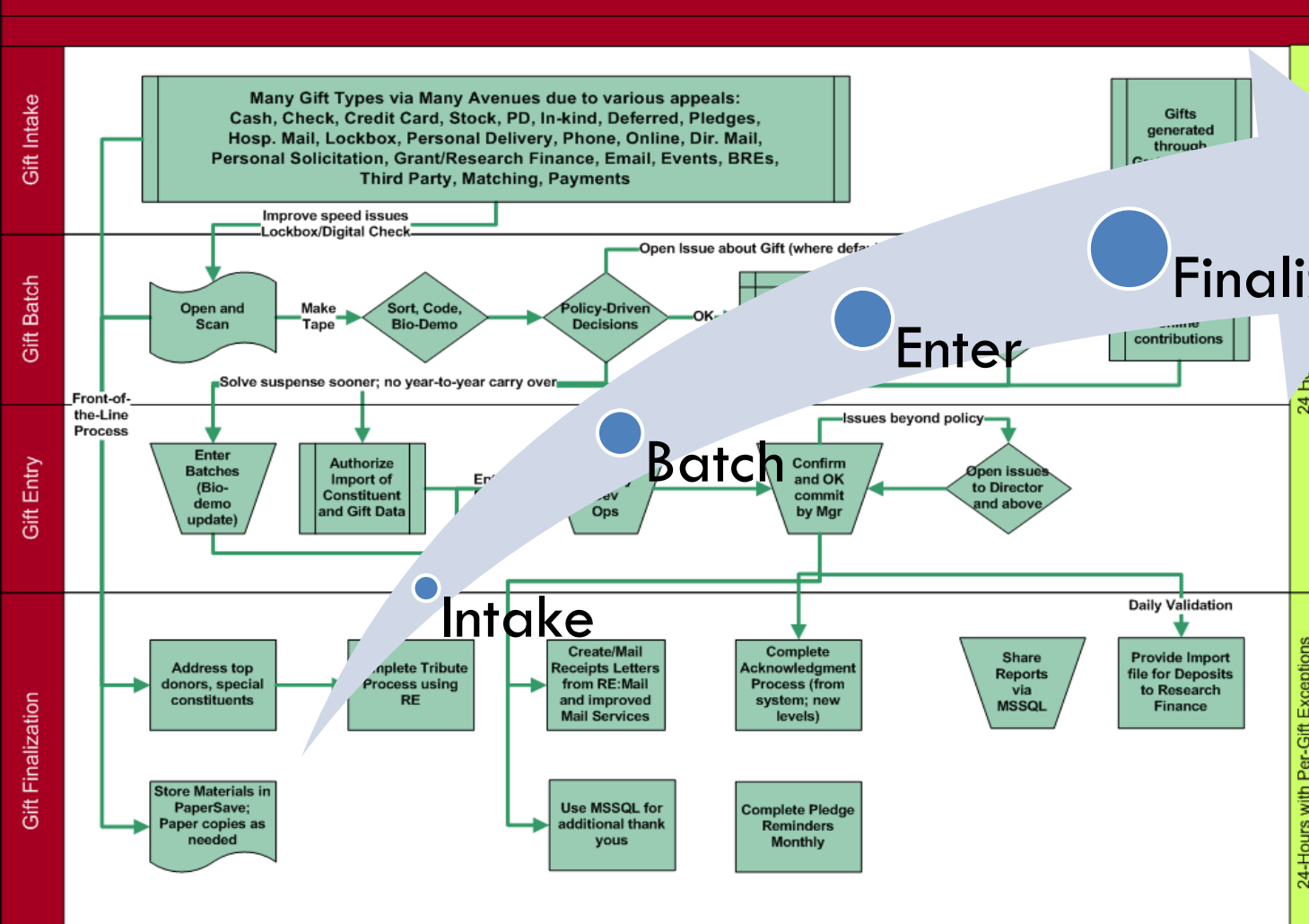
- Accurate. Complete. Timely.
 - Availability of reports
 - Do they exist? Can you get to them?
 - Accuracy of what's provided
 - Mailing lists
 - Donor lists
 - Complete? How much time spent in review? How much manual manipulation?
 - Timely? How many hours to produce?

Receipts & Acknowledgments

- Countervailing forces
 - ▣ Accuracy, Speed, and Volume
- Recent gift processing benchmarks
 - ▣ How long? 2.85 days from intake to mailing
 - ▣ How many in operations are doing? 6,700 gift or pledge transactions per FTE, or 4.6 per hour
- Ownership and accountability

Receipts & Acknowledgments (cont.)

Sample Gift Processing and Acknowledgment Environment

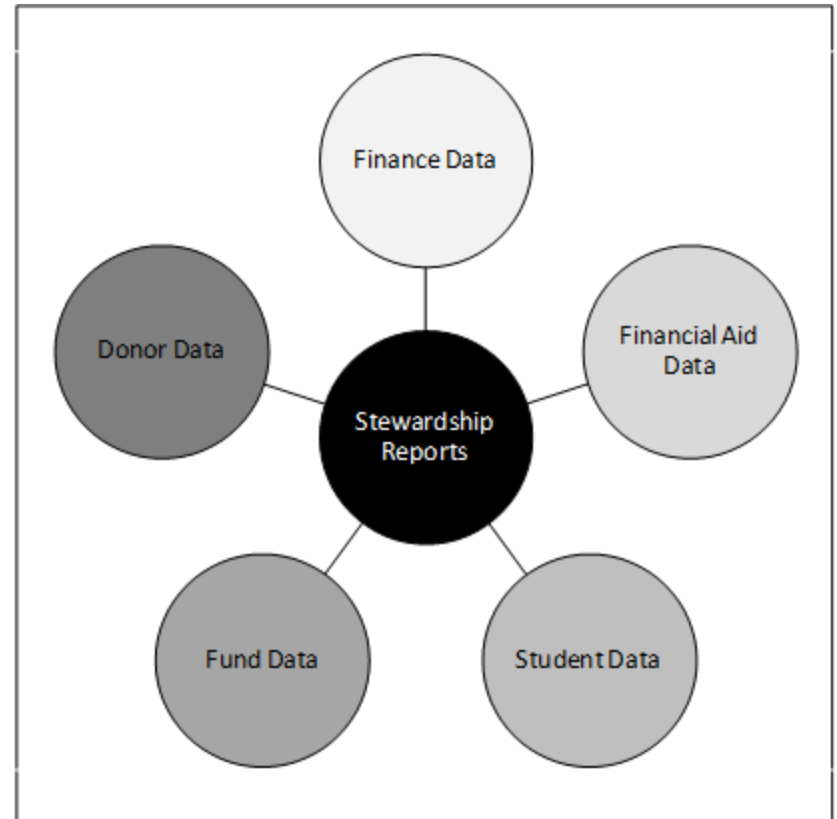


Impact Reporting

- Scholarship reports
- Endowed fund reports
- Campaign progress reports

- Operations can help combine and integrate lots of sets of data

Many Moving Parts:



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Impact Reporting (cont.)

- Accuracy and content matter
- Audiences can be unintended these days

October 16, 2011

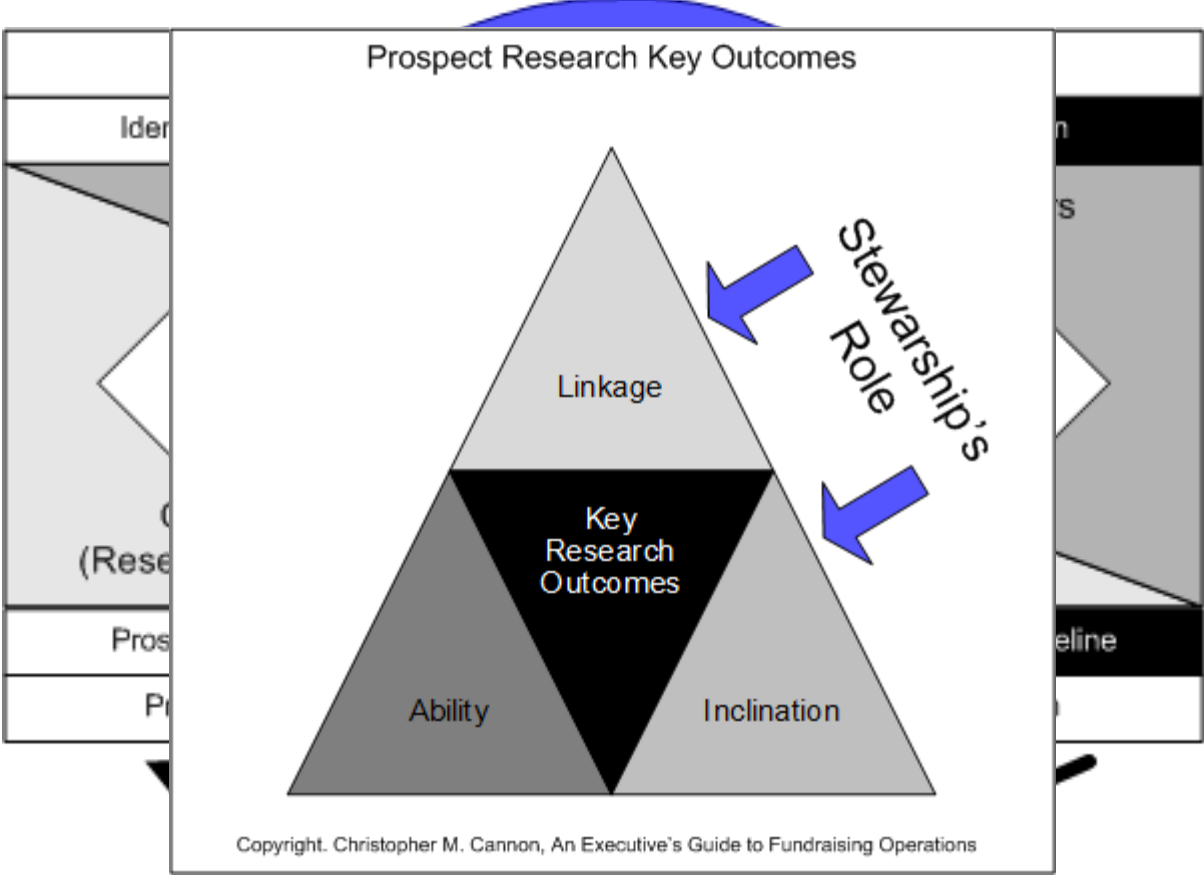
A Charity Takes Cues From Business in Overhauling Its Annual Report

By Lisa Chiu

Sheffield Hale, the American Cancer Society's top lawyer, believes nonprofits should always strive to provide potential donors and watchdogs with a well-rounded picture of their successes and failures.

But when Mr. Hale looks at the typical nonprofit annual report, he doesn't see anything resembling objective reporting. "If people read an annual report that is too rosy and there are no failures, then it's not a report."

Prospect Development



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Recognition

- Storage and management of details
 - ▣ Using your database
- Linkage
 - ▣ Who is recognized where
 - ▣ Maps, images, and GPS
- Quality control
 - ▣ Using queries to find and fix irregularities
 - ▣ Top down and inside out

Recognition (cont.)

- Best-in-class example of handling overlap: Beth Israel Deaconess Medical Center (BIDMC)

Naming Opp: New Medical Building

File Edit View Constituent Letter Favorites Tools Help

Save and Close

Org 1 | Org 2 | ✓ Addresses | Relationships | Appeals | Notes | Gifts | Attributes | Media | Actions | Honor/Memorial | Prospect | Events

Org Name: Naming Opp: New Medical Building Aliases

ID: N01

Preferred Address: Business

Country: United States More...

Address lines:

City:

State:

ZIP: 📍 DPC:

Organization matches Gifts

Matching Gift Information

Factor: Fiscal year starts:

Matching Gift Limits		
	Minimum	Maximum
Per gift		
Annual per donor		
Total per donor		

Notes:

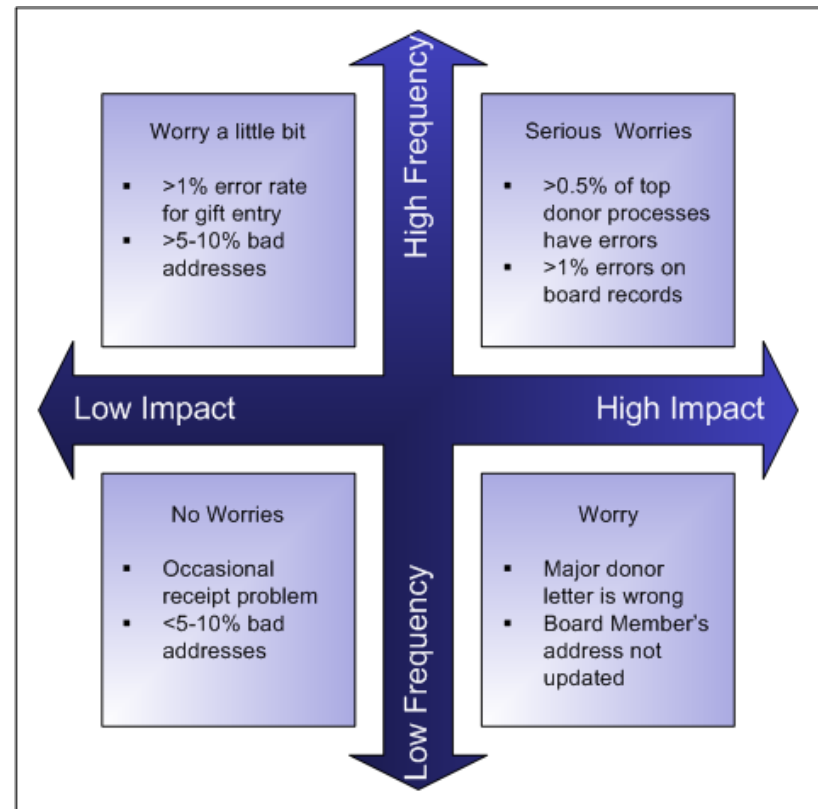
This is the naming opportunity for the new medical building. Fundraising began 1/1/10 and will continue through XXXXXXXX.

This record is the overall naming opportunity; individual opportunities within this building are separate records.

Phones/Email/Links			
...	Type	Number/Email...	Shared?
<input type="checkbox"/>			

Exception Management

- A real challenge
- Suspect vs. respect
- What's your tolerance?
- What is the cost of intolerance?



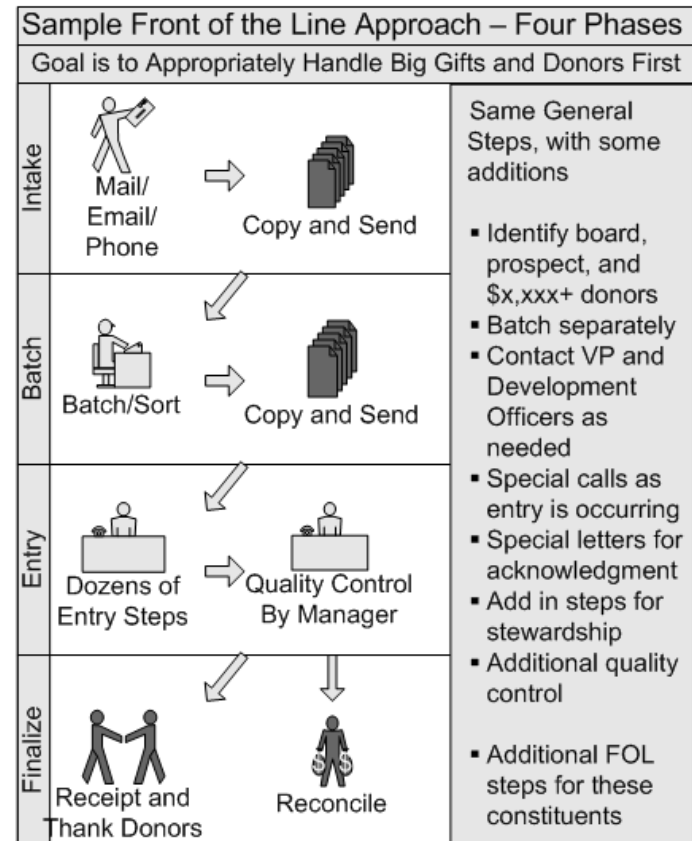
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Exception Management (cont.)

- Most feel if they control it, it's under control
- But, consider the cost of double/triple checking.
- Let's say your process requires an extra minute for 6,000 transactions each year
 - ▣ 6,000 minutes = 100 hours = 2.5 weeks!
 - ▣ So, be sure the way you're seeking and solving exceptions is worth the effort

Front-of-the-Line

- A balanced solution
- Put more (many more) resources from operations (and stewardship, of course) into handling top donors and prospects
- Gift processing has highest return because highest volume
- Dozens of applications



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How Does Your Org Stack Up?

Give your organization a score between 1 and 5 on each segment. A score of “5” means donor relations and operations are balanced. A score of “1” means not so much.

- 1) Data
(score ____)
- 2) Technology
(score ____)
- 3) Online engagement
(score ____)
- 4) Reporting
(score ____)
- 5) Receipts & acknowledgments
(score ____)
- 6) Impact reporting
(score ____)
- 7) Prospect development
(score ____)
- 8) Recognition
(score ____)
- 9) Exception management
(score ____)
- 10) Front-of-the-line
(score ____)

How Does Your Org Stack Up?

Multiple your scores against the multipliers below. That is “Receipts & Acknowledgments” are weighted pretty heavily (a factor of 15) compared to “Prospect Development” (a factor of 5). Where your scores are low and the weighting is high, your team needs an action plan to solve these shortcomings.

- 1) Data
(score ___ X 10 = ____)
- 2) Technology
(score ___ X 5 = ____)
- 3) Online engagement
(score ___ X 5 = ____)
- 4) Reporting
(score ___ X 10 = ____)
- 5) Receipts & acknowledgments
(score ___ X 15 = ____)
- 6) Impact reporting
(score ___ X 10 = ____)
- 7) Prospect development
(score ___ X 5 = ____)
- 8) Recognition
(score ___ X 15 = ____)
- 9) Exception management
(score ___ X 10 = ____)
- 10) Front-of-the-line
(score ___ X 15 = ____)

Moving on Results

- 500: Congratulations, you're the next presenter for the ADRP webinar series
- 450-500: How can you tweak areas or resolve that one big issue?
- 400-449: Starting to see a pattern? What interrelated issues can be fixed?
- 350-399: It's triage time. We can still save the patient.
- Below 350: An opportunity to re-build.

Essentials for Success

- 1) Top down, inside out (Front-of-the-Line)
- 2) Antidote for anecdotes
- 3) Collaborate as you calibrate

Questions

- Online Q&A now
- After the session:
 - ▣ Available via email (ccannon@bwf.com)
 - ▣ Follow my blog and tweets (@fundraisingops and fundraisingoperations.wordpress.com)
- Thank you and good luck!