

# ARE WE ENGAGED YET?

Presented by  
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Enterprise Bank Non-Profit Collaborative  
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# THANK YOU ENTERPRISE BANK



- *OUR CUSTOMER PROMISE...*
- *We are committed to providing a memorable and personal experience.*
- *Are we not in the same mindset?*

# & THANK YOU INDIAN HILL MUSIC



- *Indian Hill Music shares the transformative power of music, through teaching and performing, and giving music generously when there is need.*
- *Making Music...Creating Community*

# WHO AM I...

- ✓ *Lowell House Inc*
- ✓ *Girls Inc of Greater Lowell*
- ✓ *Cambodian Mutual Assist. Assoc*
- ✓ *Greater Lowell Comm. Fdn*
- ✓ *People's Club of Lowell Fdn.*
- ✓ *The Wish Project*
- ✓ *Mahoney Family Foundation*
- ✓ *Lowell General Hospital*
- ✓ *Elder Services of the Merrimack Valley*
- ✓ *Girls Scouts of NH & VT*
- ✓ *The Community Family*
- ✓ *Academy of Notre Dame*
- ✓ *UMASS/Lowell*
- ✓ *D'Youville Foundation*
- ✓ *Founder of the annual Seacoast Women's Week in Portsmouth*
- ✓ *2016 Distinguished Alumni Award -UML Alumni Assoc.*
- ✓ *Yoga teacher*
- ✓ *Avid gardener, voracious reader, enthusiastic volunteer*

# DID YOU KNOW

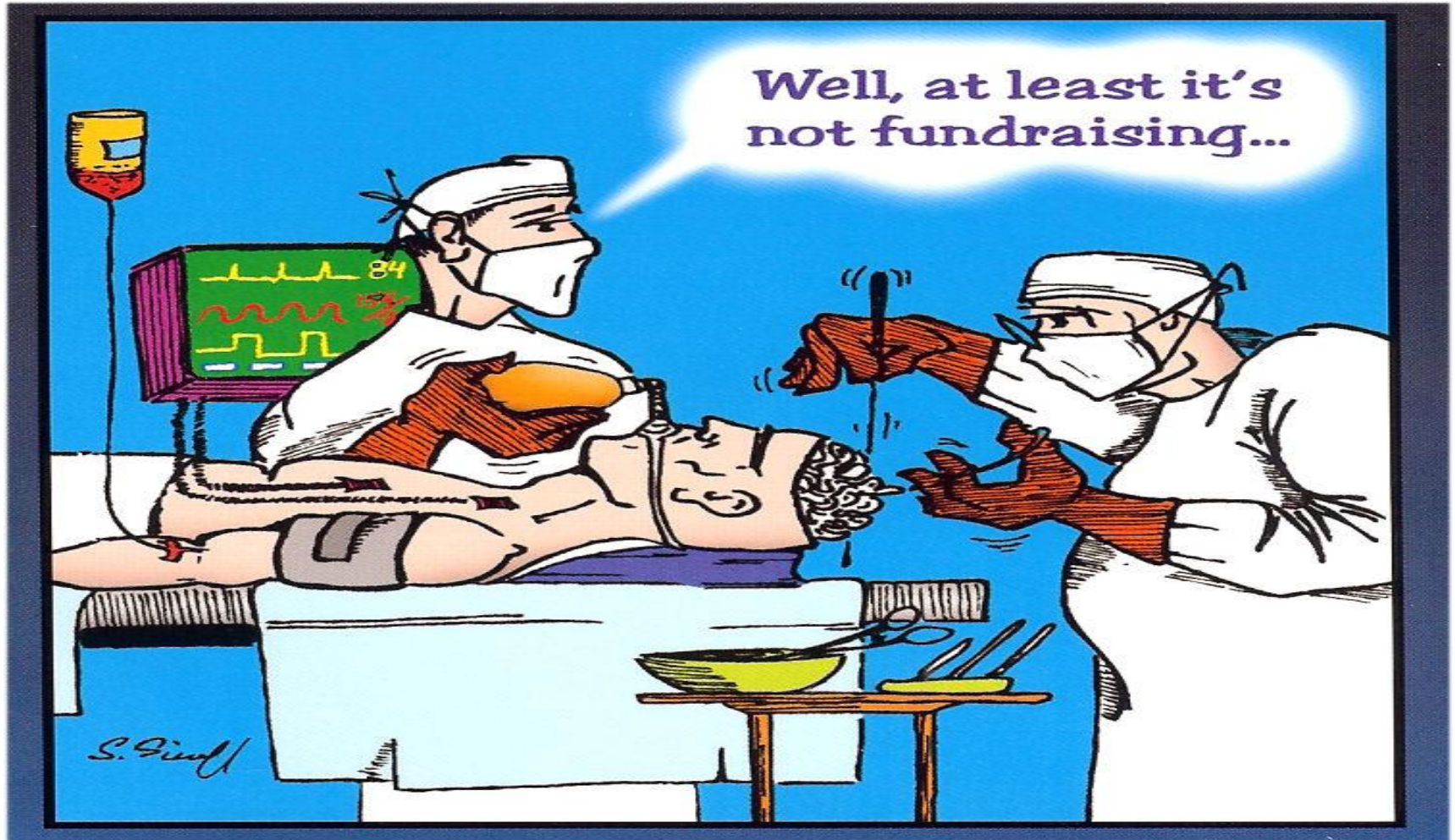
□ **The average donor retention rate in the US after the first gift is around 45%.**

□ **From Network for Good**

# TODAY WE WILL...

- *Learn ways to convert that 45% to loyal donors*
- *Learn about shared insight and ideas for your donors*
- *Engagement is a TEAM process; it's not just you*
- *Communication, cultivation, engagement methods*
- *Gratitude, stewarding donors, cheer their giving impact*
- *Active listening*
- *For today, assume your story is awesome*
- *What do you want to take away from this workshop?*

# ENGAGEMENT IS STRATEGIC...



# MEETING EACH OTHER

- *Pair up and meet your neighbor; ask what their NP does; and what they do at the NP. Ask them what is their best engagement tool they use to sustain donors. (2 minutes)*
- *SWITCH Places (2 minutes)*
- *GROUP exchange (6 minutes) SCRIBE PLEASE*
  - *What did you have to do to learn about this person?*
  - *Once info was known, what did you do with it?*
  - *How does this relate to our topic of discussion?*



# GENERAL RULES AND...

- *Presentation today is donor-centric focused*
- *Relationships, relationships, relationships*
- *It is the YOU in our communications not the WE*
- *Goal is to make people feel essential to our mission*
- *The donor is part of our team, as such, “included” in our deliberations*
- *Remember what “assume” stands for and have a solid plan*
- *Today not focusing on your branding story... I will “assume” it’s your best.*

# MOVES MANAGEMENT – Pre-Date

- *Doing your homework- MATCHDONOR.COM*
- *What's the relationship w/us; how do they "know" us?*
- *Are they new donors, increased or significantly decreased donors, lapsed, a prospect that just gave a similar organization a BIG gift, etc?*
- *What does their "summary notes" say about them?*
- *What is your plan, objectives, outcomes?*
- *Who is on the TEAM?*
- *Who makes the call and when and why?*

# MAKE THE CALL...GULP



- ❑ *Why are you calling? Be clear on the “why” because you may be asked this question.*
- ❑ *Get the “date” remembering the meeting place/time is on their schedule, not yours.*
- ❑ *Call/or email 1-2 days ahead to confirm. Need to re-schedule... no worries, set another date.*
- \* *Is your place of work the optimal place to meet?*

# THE FIRST “DATE”

- *10 minutes to go...replay the role play, outcomes, steps*
- *What is your opening intro after “thank you for meeting”?*
- *Key question to insert – “why my NP?” will gauge interest*
- *Avoid over communication/not listening – we are trained to be good writers/story tellers/speakers. Now is the time to practice 2 way communication*
- *Be mindful of time/flow of the conversation*
- *Say thank you.. not ad nauseum*
- *Goal-level of interest. Hot/Cold? Yes/next step or No/next step?*

# WE ALL SHARE IN THIS PIE –

For the first time ever, charitable giving exceeded the \$400 billion mark in 2017, spurred by growth from all four sources of giving.

## \$410.02 billion

Where did the generosity come from?\*

**Giving by Individuals** ↑5.2% **70%**  
\$286.65 billion

increased 5.2 percent (3.0 percent when inflation-adjusted) over 2016

**Giving by Foundations** ↑6.0% **16%**  
\$66.90 billion

increased 6.0 percent (3.8 percent when inflation-adjusted) over 2016

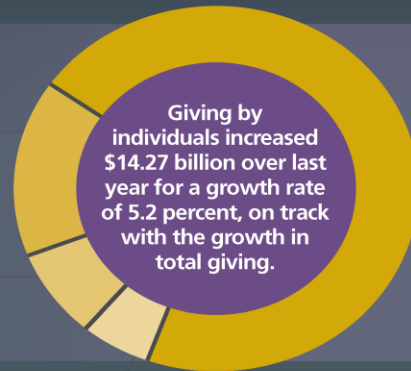
**Giving by Bequest** ↑2.3% **9%**  
\$35.70 billion

increased 2.3 percent (0.2 percent when inflation-adjusted) over 2016

**Giving by Corporations** ↑8.0% **5%**  
\$20.77 billion

increased 8.0 percent (5.7 percent when inflation-adjusted) over 2016

**Contributions by source**  
(by percentage of the total)



Visit [www.GivingUSA.org](http://www.GivingUSA.org) to learn more and to order your copy of *Giving USA 2018: The Annual Report on Philanthropy for the Year 2017*.



Giving to arts was the second-fastest growing subsector, with an 8.7 percent increase over the previous year to a total of \$19.51 billion in 2017.



Giving to foundations increased 15.5 percent in 2017, the largest gain of any subsector, far outpacing the growth in total giving.

Where are all of the charitable dollars going?

(as a percentage of the total)

The 6 largest subsectors all grew in 2017, but growth rates ranged widely from 2.9 percent all the way to 15.5 percent.

- 👤 **31% Religion** 📈 \$127.37 billion
- 🎓 **14% Education** 📈 \$58.90 billion
- 👤 **12% Human Services** 📈 \$50.06 billion
- 🏛️ **11% To Foundations** 📈 \$45.89 billion
- ⚕️ **9% Health** 📈 \$38.27 billion
- 💰 **7% Public-Society Benefit** 📈 \$29.59 billion
- 🎨 **5% Arts, Culture, and Humanities** 📈 \$19.51 billion
- 🌐 **6% International Affairs** 📈 \$22.97 billion
- 🌱 **3% Environment/Animals** 📈 \$11.83 billion
- 👤 **2% To Individuals** 📉 \$7.87 billion

Giving USA Foundation™, The Giving Institute, and the Indiana University Lilly Family School of Philanthropy are pleased to continue their partnership in providing the most comprehensive, longest-running, and most rigorously researched resource on U.S. charitable giving, *Giving USA: The Annual Report on Philanthropy*. It is a privilege to report on Americans' generosity and related historical trends on U.S. charitable giving.

\* All figures on this infographic are reported in current dollars unless otherwise noted.



# LOOKING AT THIS CHART...



- *What is the largest section of giving?*
- *Add bequests (from individuals) for 79% of the pie.*
- *If you knew nothing about development, where would you spend your time building your engagement relationships?*
- *SCRIBE: Through what mediums?*

# WAYS OF ENGAGING...

- *Send a thank you letter (#1 way/48 hour rule)*
- *Pick up the phone to call/leave a message*
- *Write a personal note*
- *Have a client write the note/mini-story*
- *Email, text, social media*
- *Send a picture from a recent event they attended/sponsored*
- *Take out for breakfast, lunch, coffee, try a new restaurant*

# MORE WAYS OF ENGAGEMENT

- *Have a board member to do some of this... does your BM know your top 20- 25 donors?*
- *Have a thank you reception*
- *Invite them to an event, ask to play in a foursome, send tickets to a (free) sports/art/community event*
- *Ask to come for a facility tour or new section*
- *Ask to meet with like minded donors/prospects to share their stories via a focus group, house party, a quarterly coffee club, etc or special survey*
- *Other ideas? SCRIBE*



# MOVING TOWARDS ENGAGEMENT

- *Let donors know how much they mean to you*
- *Segment\* for special communiqués, pop-ups (birthday, “anniversary” of first gift, acknowledgement of increased gift, etc.)*
- *When you think of the word ENGAGE what words or phrases come to mind? SCRIBE*
- *How can we put words into action?*

*\* Does your software easily segment, have dashboards, do key reports?*

# CONSTANT CONTACT

- *Maintenance – THANK YOU's via notes, emails, special touches like invitations to an event, a NP evening at the Spinners or cocktail party, recognition in newsletters, annual reports, something personal – children/family related*
- *Regular communiqués – not asking for money- to let them know their gift is meaningful like quarterly newsletters, NP news flashes/kudos/openings*

# DONOR LOVE

- *Focus not on “we/us/our” did this or that. It’s “you/your” the donor- our investor, positive change maker, patron -the focus.*
- *Segment – specialized, personalized, tailored messaging/asks*
- *Retain & renew donors – learn from the profits –positive customer first attitude; expeditious service; knowledgeable employees – KEEP IN TOUCH*
- *Learn from the BEST - Amazon, Apple, Trader Joe’s, Netflix, Google, Marriott, UPS*
- *The end result = involved and loyal donors/customers*
- *The by-product =they keep coming back w/\$\$\$\$\$\$*

# SENDING LOVE & HUGS VIA...

- *Direct mail – right message, right time, right context*
- *Retention and lapsed appeals*
- *Segmentation*
- *Tributes, memorials, birthday, anniversary, benchmarks, etc*
- *Monthly giving*
- *Acknowledgements – Yes!!*
- *New donor, increase donor, “recognition packages”*
- *Incentives/challenges/clubs/ tchotchkes*

# OTHER LOVE & HUGS...

- *Fundraisers, mega-medium-mini \$\$raisers*
- *Third party-Friend-raisers, house parties, non-\$\$*
- *Giving Tuesday – Nov. 28th*
- *Campaigns + Plaquing*
- *Person to person*
- *Phonathons and Thankathons*
- *Website, video*
- *Social media, email, text, photo*

# LOVE & HUGS FROM...

- CEO
- *Board Chair*
- *Board Members*
- *Staff impacted by gift*
- *Volunteers*
- *Grateful Patients/Clients*
- *ED*
- *Who else might be on this list?*

# TO...

- *Donors*
- *Clients*
- *Partners*
- *Sponsors*
- *Volunteers*
- *Grant sources*
- *City leaders*
- *Prospects*
- *Others*

# THE ACTION FACTION

- ❑ *What ONE weekly action will you take with your donors after today?*
- ❑ *Can you do more than one?*
- ❑ *What impedes this action?*
- ❑ *Can you make this a daily action?*
- ❑ *Will you share best ideas from today with other staff*
- ❑ *Is your staff/Board “cross-trained” on keys elements of engagement ?*



# THE CARE OF “ME” IN ENGAGEMENT



- *What do you do to de-stress your job? SCRIBE*
- *Is CHANGE in your repertoire? The 90-10 Rule*
- *What changes will you mindfully make for yourself?*

# SUMMATION

- *Keep your constituents engaged all year long.*
- *Donor love and Fundraising are ongoing, year round, not stopping in December or after an event or making your goal. These are the optimal times to reach out.*
- *Fundraising is dynamic – shake it up! Lots of ingredients today for your secret sauce.*
- *Tell your story - all the time and maybe stick to one story w/pqrts. Connect emotion with results.*
- *Donors are your customers. Thank them and ask them what they like about you. Do more than the acknowledgement letter.*
- *Plagiarize/ learn from the best. Think about those nonprofits you respect/have gobs of marketing \$\$\$\$. Look at their literature, website, call them, mimic good standards.*
- *Be confident in what you do. Your organization is the most deserving nonprofit out there. Be its passionate cheerleader. Engage and teach new cheerleaders.*
- *YOU are the most important person in your sphere!*

# THE GOOD NEWS\*...

- Americans' record-breaking charitable giving in 2017 demonstrates that even in divisive times our commitment to philanthropy is solid. As people have more resources available, they are choosing to use them to make a difference, pushing giving over \$400 billion," said Aggie Sweeney, CFRE, chair of Giving USA Foundation and senior counsel at Campbell & Company. "Contributions went up nearly across the board, ***signaling that Americans seem to be giving according to their beliefs and interests, which are diverse and wide-ranging.***"

# AND MORE GOOD NEWS...

- The broad growth in giving to virtually all charitable subsectors suggests ***that charities are connecting effectively with their donors and demonstrating their impact and case for support,***” said Patrick M. Rooney, Ph.D., executive associate dean for academic affairs at the Lilly Family School of Philanthropy. “While it is too soon to know with certainty how recent policy changes may influence when and how much donors give, ***what is certain is that cultivating and nurturing strong, ongoing relationships with donors will only become more important*** as the changes to federal tax policy made at the end of 2017 take effect.”

\*Reference: [www.givingusa.org](http://www.givingusa.org).

# THINKING ABOUT 2018

- ❑ *Engage your donors –make xx donor visits monthly.*
- ❑ *Build relationships everywhere you can-ask your Board, even major donors to “work the room” at events.*
- ❑ *Give your top donors a SPA (special, personal, appropriate) treatment ex. Send a note from a former client or patient/youth/rescued dog/etc saying “We celebrate your loyalty and support over the years.”*
- ❑ *Tell your BEST story.*
- ❑ *Be savvy w/social media; capture emails/cell numbers.*
- ❑ *Use “business intelligence”.*
- ❑ *Stand out from THE CROWD!*

# ETHICS

- *Read the AFP Standards*  
<https://www.afpnet.org/files/ContentDocuments/CodeofEthics.pdf>
- *Read Donor Rights*  
<http://www.afpnet.org/files/ContentDocuments/DonorBillofRights.pdf>
- *Always do the right thing.*
- *When in doubt, seek advice. Ask a mentor or peer.*
- *If you make a mistake, own it.*

- *Does anyone know what that number means to us today?*
- *And remember it's not all about asking – use months like Nov and Dec as Thanks for Giving months*
- *Make Feb 17 – random acts of kindness day your “giving Tuesday”*

# WILL ROGERS SAID...

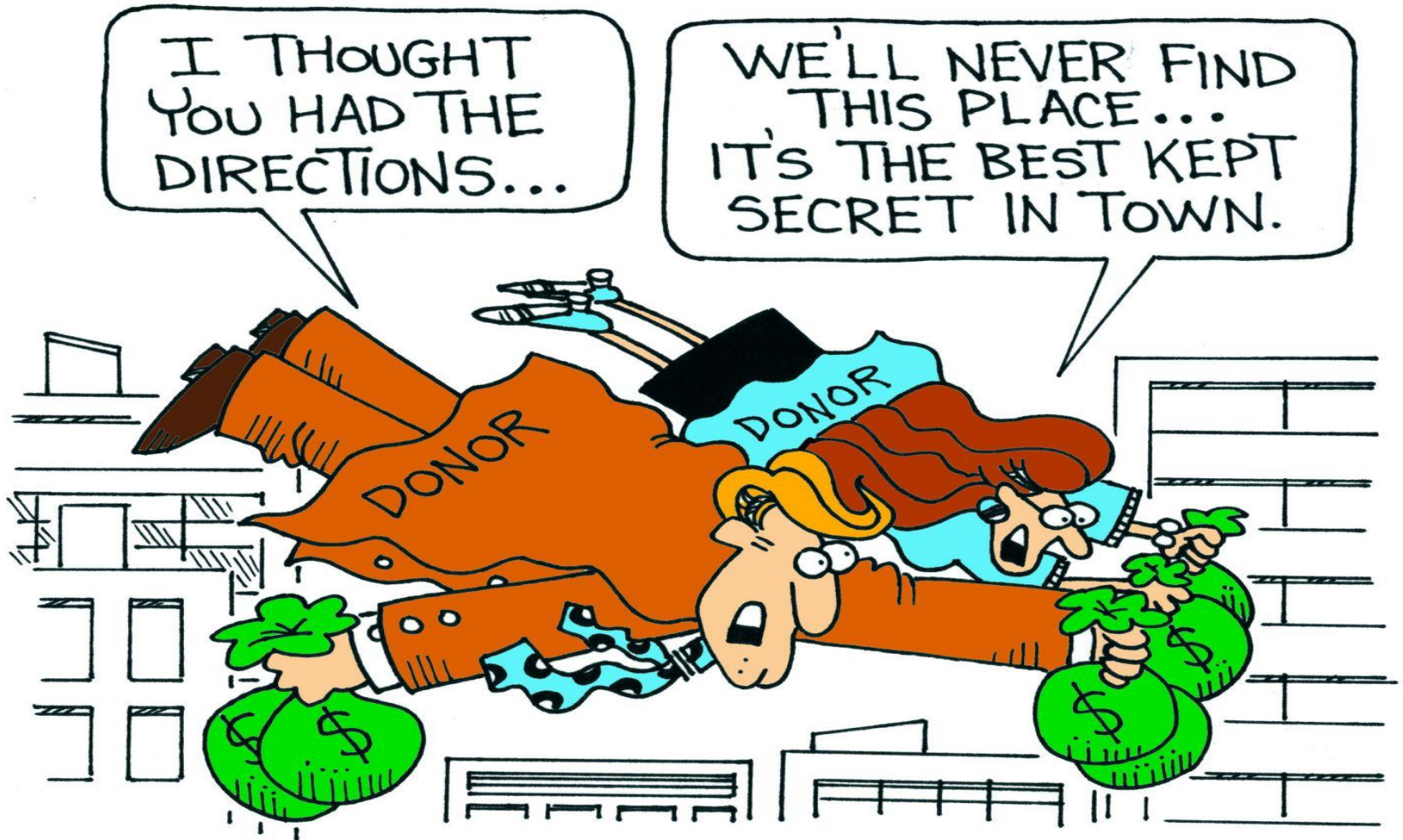
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*“If you want to be successful, it’s pretty simple. There are only three things to keep in mind:*

- Know what you’re doing.*
- Love what you’re doing.*
- And believe in what you’re doing.”*



# AVOID THIS...



# THANK YOU!



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