



## PEOPLE PURPOSE PASSION

Sustaining Relationships that Build Value for Your Organization



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## TERMS AND METHODS

**Appeal:** Request for support from a prospect or donor.

**Database:** A key component of your fundraising systems. Consistent data entry is a building block to develop, maintain, and strengthen appropriate relationships with many donors.

**Diversity:** The demographic mix of a specific collection of people, taking into account elements of human difference, but focusing particularly on race and ethnicity, LGBTQ populations, people with disabilities and women.

**Donor:** Broadly defined, a donor is anyone who supports your organization by contribution resources, including time and money.

**Donor communications:** A key way to enhance relationship with your donor base over time. Every communication should not be only an appeal.

**Equity:** The promotion of justice, impartiality and fairness within the procedures, processes, and distribution of resources by institutions or systems. Tackling equity issues requires an understanding of the underlying or root causes of outcome disparities within our society.

**Inclusion:** The degree to which diverse individuals are able to participate fully in the decision-making processes within an organization or group.

**Prospect:** A potential donor. Prospect research helps you assess whether people might be a good match to pursue.

**Prospecting ABCs:** “Friend-raising” with specific prospects and donors who have the **Ability** to support your organization, who **Believe** in your organization’s cause, and with whom you have **Contact**.

**Retention:** Getting donors to give again and again until they donate out of habit.

**Segmenting:** The process of using your database to make lists of different types of donors, which can help you give each donor the type of attention they want. This helps focus your strategy on donors loyal to the organization, rather than to a person or event.

**Social media:** The use of online and mobile-based technologies to facilitate connection and dialogue amongst users. Popular social networks include Facebook, Twitter, and Youtube. Can be effectively harnessed to integrate into fundraising strategy and campaigns.

## UNDERSTANDING OUR RELATIONSHIP TO MONEY

In order to fully engage with our transformative work as fundraisers, we must also understand the financial taboos, stories, and safety strategies we've inherited or adopted, and imagine new possibilities and strategies.

Take 10 minutes to write out some reflections here on your money history. No one will read this but you. Some questions you might consider:

- How did your parents or primary caregivers handle money? Did they disagree? How did you feel about the way they handled money?
- Did your family experience significant financial change during your childhood? How might that have impacted your relationship to money?
- Did you have more or less money than your friends? What beliefs about relationships and money did you develop as a result?
- How did your relationship to money compare to that of your caregivers or siblings? If different, do you have a sense of why?
- Could you discuss money with your family as a child? And today?
- Did you have to work at a young age? Did you choose to work? Did you not have to work at all? What beliefs/values did you develop about money and work as a result?

## **FUNDRAISING IN RARE TIMES**

**COVID-19** #NPCOVID19 Resources for Non Profit Organizations by Beth Kantor and Others

<https://docs.google.com/document/d/1k5pC-R1V4SK4bRPN7cqh9WplxubXP5tt8qpF5hinMoQ/edit?usp=sharing>

### **DIVERSITY EQUITY AND INCLUSION (DEI) in FUNDRAISING**

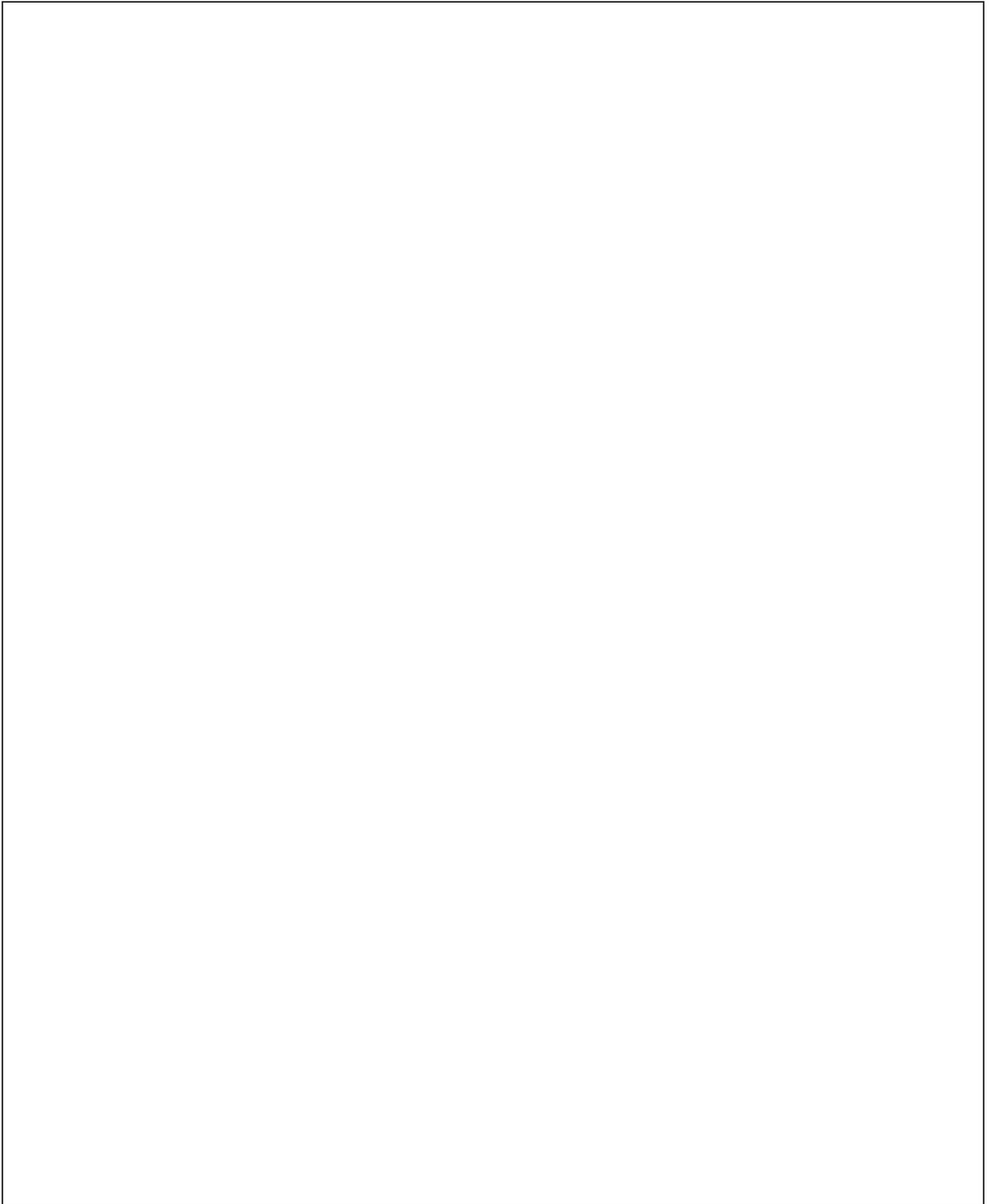
- Are we aware of and do we value existing diverse donors in our organization or in the community we serve? Are we publicly promoting narratives that affirm a diverse and inclusive development and donor team? Have we checked our assumptions about whom we deem a donor?
- Do we see and understand historical factors that underlie the issues we aim to tackle? Do we acknowledge past circumstances that have driven inequalities, and do we prompt givers to recognize the advantages some groups and individuals have gained over others from generational privilege as a part of our case statements?
- What is the value in getting proximate to those we serve? Does every individual at our organization—including the board chair and the office coordinator—have an intimate understanding and knowledge of our constituency, including our donors?
- Do we see donors and community leaders as equal partners in our philanthropic strategy? Do we see community as a partner with the competence to meaningfully contribute to our fundraising efforts?
- Do you see the value of including diverse persons in your fundraising plan? Do we believe we have only something to get, as opposed to something to learn, from those you aim to fundraise with?

## **MOVING STORYTELLING**

Create a compelling 1-2 minute description of your organization's plans, delivered as part of a two-way conversation, that educates and hopefully, elicits interest from listeners. Your Story Must Answer the Following Questions:

1. What does the organization do? What is its mission?
2. Why is the organization necessary? Is it trying to address a particular problem or issue?
3. How is the organization addressing the problem? What makes it unique or different than another organization with a similar mission?
4. How long has the organization been in existence?
5. How many people does it serve?
6. Why is this organization important to you?
7. How can the listener support the organization?

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