



## Organizational Relation'shifts'

I know it may look like a typo but it isn't. There really is the suffix 'shifts' and not 'ships' at the end of the word relation. The world of business development or fundraising for nonprofits has a clear focus; identify and build partnerships with people who can build your organization, invest in your vision, and/or buy your product/services. Building and [deepening relationships](#) is a significant part of successful philanthropy. I thought I would share some of the steps I use with organizations to shift towards a culture with a deeper focus on relationships with the investors (boosters, funders, members, etc.) and ideas on how to establish goals and practices that can help make this shift happen.

At the Women's Funding Network conference, I had the honor of sharing the podium with Clare Costello who oversees the philanthropic work of Bank of America and shared key findings from the [2008 Bank of America Study of High Net Worth Philanthropy](#). The ideas below are supported by the Bank of America report that showcased the factors for successful investing by high net worth philanthropists. I also believe that the findings, and Clare concurred, are applicable to all levels of donors. Donors are trying to make an impact for the community and themselves. They want transparency and they value the feeling that they are making a difference and 'doing good in the community'.

1. **Move Goals from Dollars to People.** If the sales or fundraising staff has a monetary goal for a month or quarter, what would happen if the organization shifted the focus from dollars to number of personal contacts with people? Instead of raising \$10,000 a week, what would happen if the goals of the development/sales staff were reoriented to achieving 20 meetings a month by volunteers, the CEO, and/or program staff? See what happens to the culture of the organization when one shifts the goals and reporting to numbers of phone calls, personal notes, and small events that are held in a month with qualified donors. Define circles of influence that are important to your work (Dads with daughters, businesswomen, government leaders, etc.) and set goals for meetings with the key leaders in each of these circles.
2. **Deepen Engagement and Trust.** Finding ways to invite donor partners to the table is critical for success. The use of focus groups, surveys, committee work on substantial issues, donor circles, and grant and program review involve donors in a meaningful way and are essential to a relation'shift' plan. Delivering prompt and personal thank you notes for gifts and having athletes or grantees make thank you phone calls to boosters/donors is also a critical task. Have measurable goals for an organization to monitor around stories of people served and how these are shared. Review the [characteristics of good fundraising](#) with the entire organization.
3. **Examine your own Relationship with Money.** Whether you are a Board member, program officer or executive in sales or fundraising, address your money issues. What

[www.ImaginePhilanthropy.com](http://www.ImaginePhilanthropy.com)

[tuti@imaginephilanthropy.com](mailto:tuti@imaginephilanthropy.com)

516.380.0923



are your own giving habits? If you have not personally invested in the organization to your capacity, how is it that you will be able to have this conversation with others? How do you feel about money – stressed or relaxed? Whatever you feel about money is brought to a conversation with a prospective investor. Spend some time doing some [inner work](#) and dialogue around money, class, and prosperity and see how it can shift your work and your organization.

4. **Build Systems and Infrastructure for Measurement.** Follow up, follow through, and follow up. From every prospective donor conversation there should be a summary of the meeting, a rating of the prospect based on research, and a specific plan for further engagement. The people who the organization's leadership meets with are all potential contributors. Next to its brand, reputation, and leadership, the database of these names and the information about them is an organization's biggest asset. Make sure your database system allows the creation of 'chrono reports' or follow up activities for people. A database is only as good as the people hired to fill it with data so build in costs for research profiling, data entry and training for all staff who need to analyze and use the data. Successful institutions have these systems and people in place as well as regular "moves management" meetings where next steps and ratings of prospects are continually reviewed and updated.

*Tuti B. Scott is the President of Imagine Philanthropy, an international consulting firm that supports funders in effective giving and guides organizations and nonprofit leaders seeking to enhance and energize their work.*