

## **Building Relationships With Your Constituents**

*Read this over and over until it's second (or first!) nature to you.*

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### **Relationships rule!**

Developing stronger relationships with your constituents is critical to effective and productive fund development. The success of your organization depends on your ability to build relationships.

Your constituents are at the center of this relationship, not your organization. To be effective, you must focus on them. Remember, it's not what you're selling but what the constituent is buying that counts.

The process of building relationships for philanthropy is all about finding out if your personal and professional contacts are interested in the cause that you espouse.

Building relationships is not about trespassing on your personal and professional relationships. You are not expected to raise money by coercing gifts from those who feel an obligation to you. No! That's trespassing and it's unnecessary and certainly inappropriate.

### **The steps in relationship building**

1. Respect and understand the needs and motivations of your constituents. (This means you have to get to know them and keep the information on file and use it appropriately.)
2. Meet their needs if they are in keeping with your organization's values, mission, and vision.
3. Communicate your programs and activities and their value to the constituents. (Use *Love Thy Reader* to strengthen your written communications. Remember to communicate without asking for money all the time.)
4. Follow up and nurture the relationship. (Cultivation activities include donor recognition, personal meetings, events where you hang out with them and talk with them.)

### **Understanding terminology**

- a) Constituent means someone (or some group, e.g., business) that has somehow raised its hand, signaling its interest in your organization. For example: clients, donors, and volunteers.
- b) Predisposed refers to someone (or some group) that you suspect might be interested but the interest has not yet been confirmed.
- c) Prospect is shorthand for prospective donor or volunteer. You have confirmed their interest, no matter the nature of that interest.

### **What you have to do**

- a) Identify the predisposed. Find out if they are actually prospects. Then move them into cultivation, asking, and cultivating again to maintain loyalty.

- [Or, you might find out that the predisposed is not actually a prospect so don't "add them to the list." Move on!]
- b) And for those who are already donors, nurture the relationship to retain their loyalty.
- c) **So who does all this?** Every single board member and every single staff person. And the "development office" facilitates and coordinates the effort. Be intentional and well planned.

### **Getting to know their interests, disinterests, motivations and aspirations**

You can find out about them through surveys, focus groups, and personal dialogue. You listen to them. Remember: getting to know them is not not telling them about your organization!

Use conversation! Every day, you learn about colleagues, neighbors, friends, and even people sitting next to you in an airplane!

You talk with your colleagues on Monday morning and share stories about weekend activities. You talk with clients and customers about their work or worries or responsibilities.

If you're a good conversationalist, these are *conversations*, not mini lectures or presentations. You ask engaging questions and share and listen and learn.

You try to keep the conversation going. One might say that each exchange is "the purchase of more time" to continue the dialogue, thus nurturing a relationships.

All of these conversations provide you with information. You learn about the interests and disinterests, motivations and aspirations, and values of those you are speaking with. (And then you tell the office so the information is kept on file!)

### **Cultivation gatherings: nurturing donor loyalty and introducing the predisposed**

Gatherings are a great way to nurture donor loyalty. Ask a donor to lunch and tell him about your successes and invite his comments. Invite several donors to meet with you and conduct a mini focus group. Meet with some lapsed donors (they gave before but aren't giving now). Ask them why they stopped – and maybe you can help them start giving again.

Or have a big party and ask lots of people – current and prospective donors and the predisposed. (And by the way, the gathering doesn't have to be a big party. Have a small party. Or ask these donors, prospects and predisposed to attend a seminar or other event that you are hosting.

BUT! Make sure that you mingle with these special guests. Board members and staff should not hang out with each other. They should mingle and connect and carry on conversations. That's how you learn and cultivate relationships!

And P.S.! Do not ask for money at a cultivation gathering. And tell your guests you will not ask for a gift at the gathering.

### **Host your own cultivation gathering**

Every single year, people from your organization should host cultivation gatherings. It is best to host these gatherings in homes or boardrooms. Hosting the gathering at the organization is not that effective because it isn't particularly personal.

By the way, co-host with one of your colleagues from the organization. This can reduce the stress, increase the invitation list, and share the workload.

Ask some of your donors to host a cultivation gathering for their colleagues and friends. And sometimes attendees at a cultivation gathering sometimes offer to host one.

## **So turn the page for the details!**

# Hosting your own cultivation gathering

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## **Purpose of your cultivation gathering**

- Introduce the predisposed and prospects to the organization, its mission and services.
- Nurture the relationship with current donors and volunteers and strengthen their loyalty.

## **Potential invitees for your cultivation gathering**

1. Current and lapsed donors to your organization. And volunteers too!
  - a. Get the list from the office.
  - b. Start by inviting those who will know your name or know you personally.
  - c. Then you can also invite people you don't know / who don't know your name either – but are donors and do know the organization. (They are not as likely to attend but you can still try.)
2. Prospective donors
  - a. Get the list from the office. These are people or businesses or civic groups that the organization has qualified as prospects; these are not the predisposed, those you suspect but are not sure.
3. The predisposed
  - a. Now you have to identify the predisposed. Yup, you. Think about your professional colleagues and friends and neighbors. What do you know about their interests? Does anything you know suggest that they might be predisposed to some part of your organization?
  - b. Will they come? Who knows but you sure can try! Focus on their interests and what your organization can do for them.

## **The invitation** (See the sample invitation at the end of this document.)

You develop and send the invitation. Don't ask the staff to do it; this is your gathering. Don't use the organization's letterhead; use your own. Or buy some interesting stationary or cards. For the right audience, you can also use email.

Compose an invitation and print it from your computer. Or hand write the invitations.

Make sure you ask for an RSVP. Give an RSVP due date. And provide an email address and telephone number for RSVPs.

Send out the invitation at least one month in advance, given people's complex schedules. You should estimate that about 25% of the invitees would say yes. And some of those may not actually attend. And sometimes, people who didn't RSVP do attend.

P.S. You should contact each invitee who does not RSVP and get their answer. This is a qualifying action. They may be unable to attend and may wish to be invited again. Or they may simply not be interested. You have to find this out.

P.P.S. Put in the invitation that this is not a fundraising event and the invitee will not be asked for a gift at this gathering.

## **Attendance**

Your gathering is a success no matter how many people attend. 5 – 10 people is comfy sitting around the living room and attendees ask lots of questions. 20 – 30 people is big! Any more than that and it's hard to ask questions and have conversations.

### **Who attends the cultivation gathering?**

1. The host or co-hosts of course! And the invitees.
2. If appropriate, a staff person from the organization – who can talk firsthand about services and answer questions.
3. And perhaps a couple board members who haven't hosted one yet and want to have a personal experience first.

### **So what happens at the cultivation gathering?**

1. Mingling. Refreshments. Meeting new people and current colleagues and friends.
2. As people arrive, offer refreshments and engage them in conversation.
3. After 20 – 30 minutes or so of mingling, convene the group. Ask everyone to take a seat.
4. The host welcomes and thanks. The host explains why s/he is involved in the organization and thinks it is important. Then the host introduces the “guest speaker.”
5. Guest speaker speaks for 15 minutes or so and invites questions and engages people in dialogue.

The gathering usually lasts at least one hour and typically lasts 1.5 hours or so. The more questions asked, the longer the gathering lasts.

Here's another idea for your cultivation gathering: Conduct a mini focus group. You ask questions of the invitees instead of them asking you questions. For example, a human service agency might ask: *We are thinking about developing a seminar series. Experts would talk about issues that might be of interest to you and your family. A modest fee would be charged to pay for refreshments. Might you be interested in such a series? If yes, what kinds of topics would be of interest to you?*

### **The guest speaker**

There are different ways to approach this. For example:

- The executive director can talk about people in need and the service response. Why we do what we do and why it is important – not just what we do.
- A staff or volunteer expert can talk about a specific topic of potential interest for the invitees.
- Include a few remarks about how your organization's services are funded.

### **Handouts**

Sure. But don't get carried away. Don't overwhelm them with paper. Bring the organization's capabilities brochure for everyone. If you have multiple services (with a different brochure for each one), just bring a few – or those targeted to the invitees.

### **Closing your cultivation gathering – the sign up sheet**

The host thanks people for coming and invites people to sign up if they would like further information / to be on the mailing list. Pass the list around. Make sure a pen is available. Don't watch as people sign up or not; that's off-putting. (Develop a sheet that provides space for name, snail mail address, e-mail address, and telephone number.

See also the sample sign up form at the end of this document.

Keep in mind: Some people will not sign up. After listening, they simply won't be interested. But typically, if they attend the gathering, they may well sign up – or a significant number of them will.

**Who pays for the cultivation gathering?**

- You do. You the hosts. Not the organization. You pay for the refreshments and invitations and postage. This shouldn't be expensive.

**Sample invitation**

Lots of exciting things are happening at the Women's Fund. We'd like to share our vision and accomplishments with you and hear your thoughts.

Bring your questions and please join us for an informal gathering to learn more.

**Wednesday, November 5, 2004 at 5:15 p.m.**

**10 Johnson Road, Foster, Rhode Island**

Your hosts: Mary Jones and Simone Joyaux

P.S. This gathering is for information only. Do **not** bring your checkbook.

Please RSVP by October 31 to Simone at 397-2534 or spjoyaux@aol.com

**Sample sign up card** (Note, this is for a social justice organization. How can you modify it for your organization? What might be your box choices?)

**Your Personal Promise Form • Your Action Makes A Difference**

Please complete this form. Turn in your *Promise* and we'll keep in touch. Keep a copy for yourself.

I will be a voice. I will speak out for the rights of women and girls.

I want to be counted. Make sure I'm on the Women's Fund mailing list and e-mail alert list.

I want to help. Send me information about volunteer opportunities.

I want to fuel the fires of change. I'm sending in my financial gift to help the Women's Fund do its important work.

I want to be part of a social change community. Invite me to gatherings where we talk about the issues facing women and girls, and figure out how to work together for progressive change.

I am a social change agent. I know I can make a difference.  
I'm turning in my *Personal Promise*.

Please print clearly.  
Name  
Address Telephone numbers E-mail