Things Every Donor Relations Professional Should Know
Heurista is the name Anne created to represent the firm’s discovery-based approach to problem solving and the cooperative, creative process characteristic of our work. Anne has been involved with donor recognition strategy, design and implementation since 1995. She has been an active member of the Association of Donor Relations Professionals since 2005 and is the managing editor of the *Journal of Donor Relations and Stewardship*. 
Discussion-based Research Project
1. Survey of seasoned professionals within the ADRP ranks
2. Toronto ADRP Regional
3. Birmingham ADRP Regional
4. ADRP Webinar & Hub article
Answer the poll:
**How do you spend the majority of your time at work?**
- Communicating with people
- Managing data or systems

Jot down your priorities:
**What are 10 things you would look for in another person coming on board to do your job?**
Answers vary based on…

• Job responsibilities
• Differences in learning and communication styles
• Type of organization
• Leadership’s vision or work style
• Experience level
• Level of authority/autonomy
Category One: Communication

• Speaking and writing well and with confidence
• Creativity
• Problem-solving
• Empathy for multiple audiences
• Relationship building/networking talent
• Ability to interact well with peers, superiors and donors
Category Two: 
**Data Management & Analysis**

- Manage and maximize use of database systems
- Strategic planning
- Process development
- Project management
- Measure, analyze and report
- Problem-solving through teamwork
Category Three: Merit-based Ambition

- Graceful interaction with others
- Articulate the value of one’s work
- Cross departmental collaboration
- “Asks for a seat at the table”
- “Leads with a carrot not a stick”
- Manage up
Professional Skills

Data, report specification, analytics experience (10)
Show your value/ask for a seat at the table (7)
Writing skill, acknowledgements & reports (6)
Relationship building skill (ability to know your donor) (6)
Influence/ability manage up and collaborate (5)
Strategy, process & project planning/management (5)
Fundamentals of fundraising training (4)
Awareness of industry best practices (4)
Networking skill/ability to recall names/introduce others (4)
Creativity for solving complex problems (3)
Gift processing experience (3)
Natural talent for showing gratitude/graciousness (3)
Event planning/management experience (2)
Flexibility/versatility in regards to challenges (1)
Professional Skills

• Critical/analytical thinking
• Ability to quantify and measure your work
• Ability to specify reports and work with/analyze large volumes of data
• Ability to automate/streamline/standardize
• Creativity to find solutions to complex requests
• Confidence to represent the institution to the donor and the donor to the institution
• Confidence to claim a place at the table and demonstrate your expertise
• The ability to discern or research what donors actually want
Knowledge

- **Donor Bill of Rights & ADRP Ethics Statement**
- Policies & Procedures specific to your organization
- Institutional strategic priorities
- Best practices within the industry
- Best practices within your set of peers
- Donor statistics specific to your organization
- Donor motivations specific to your organization
- Specific information about individual donors, as needed
Four Elements:
- Gift acceptance and management
- Acknowledgment
- Donor recognition
- Reporting

http://www.adrp.net/assets/documents/adrpdefinitionsexpanded.pdf

Four Pillars:
- Acknowledgment
- Stewardship and impact reporting
- Recognition
- Engagement

http://www.academicimpressions.com/4-pillars-donor-relations
“Finding staff who have experience in traditional donor relations and stewardship roles is challenging for all organizations. I’d like to recruit people with some background in the field so that I know that they are versed in the whys and wherefores of donor relations and stewardship practices; however, I have learned to appreciate enthusiasm, transferable skills, and a propensity for learning the nuances of donors relations over past experience.”

– Nancy Lubich McKinney
University of California, Berkeley
Journal of Donor Relations & Stewardship
Book 1: Definitions
Just out of curiosity, what was your first college degree?

- English
- English/Shakespearean/comparative literature
- Communications
- Journalism
- Psychology
- Sociology
- Business Administration
- Psychology and Shakespearean literature
- Journalism & Broadcasting
- Math
- Spanish
- Theater
What skills contribute to your current career?

Writing
Communication theory (empathy for the audience)
Research
Understanding of phenomenology and process
Project management
Fluency in the financial realm
Team-building
Problem-solving
Critical thinking
Ability to make connections between seemingly disparate things
How was the bulk of your knowledge about donor relations and stewardship acquired?

“My knowledge of stewardship began organically, in my own life, in the way I steward my personal relationships.”

On the job training
Experience
Trial and error
Colleagues and mentors
Conferences, research, benchmarking and networking
ADRP and CASE
Books
Resources offered by ADRP:

- Webinars
- The Hub
- ADRP Listserv
- Member Directory
- Knowledge Center
- Archives
  » Webinars
  » The Hub
  » Conference presentations
  » Samples
- Career Center
- Regional conferences and workshops
- Annual international conference
- Scholarships
Regional Conferences and Workshops:

Toolkit: https://adrp.memberclicks.net/assets/Regional/adrp_2016_regional_event_toolkit.pdf

ADRP Regional Event Toolkit

Each year, ADRP volunteers host regional events as a way to bring together donor relations and stewardship professionals to network, inspire, and learn about best practices within the profession. Regional events are held in various locations across the United States and Canada, serving as a platform to connect with professionals in your area. These events can only come to fruition through the hard work of our volunteers. With support, guidance, and approval from ADRP, volunteers create successful regional events and programs in a variety of formats.

<table>
<thead>
<tr>
<th>Types of Regional Events</th>
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<tbody>
<tr>
<td>Coffee Meet-up or Happy Hour</td>
<td>10-25 guests who meet for networking and discussion</td>
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<tr>
<td>Breakfast or Lunch Roundtable</td>
<td>25-50 guests at a breakfast or lunch event. Can include a presenter or roundtable discussions</td>
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<tr>
<td>Regional Workshop</td>
<td>50-100 attendees, with 3-4 speakers and a panel or information roundtable discussions.</td>
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<tr>
<td>Regional Conference</td>
<td>One or two-day event in your town with multiple speakers. Intending to create lasting connections with your colleagues.</td>
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How did you learn the vocabulary specific to this work?

On the job Experience
Books, blogs and newsletters
ADRP Listserv
Attending conferences
By studying for the CFRE

Certified Fund Raising Executive® is practice-based credentialing offered by CFRE International.
Visit www.cfre.org to learn more
List of Glossaries:

- **Journal of Donor Relations and Stewardship** (Open Access)
  http://www.journaldrs.com/

- **ADRP** (Open Access)
  http://www.adrp.net/assets/documents/adrpdefinitionsexpanded.pdf

- **AFP Fundraising Dictionary** (Members Only)
  http://www.afpnet.org/ResourceCenter/ArticleDetail.cfm?ItemNumber=3380

- **CFRE** (Open Access)

- **Council on Foundations** (Open Access)
  http://www.cof.org/content/glossary-philanthropic-terms
Advice

• Ask lots of questions, learn your organization, and don’t assume anything (positive or negative).
• Focus on developing both technical skills and the professional presence needed to effectively represent the donor relations perspective.
• Assume your decisions are the best anyone would make when faced with the same circumstances.
• Stick with your decisions long enough to become convinced they were right or wrong.
The most important question you can ask is **WHY?**

Simon Sinek: *Start with Why*

Book
TeD Talk
Advice

• I would tell my younger self to approach every project or issue with a positive attitude and a creative spirit, always looking to build on previous relationships or repair those that have been strained. It is not possible to make everyone happy all the time, but as long as you strive to do what is right—for you, the institution, and the donor—your work will be appreciated and will surely make a difference.

• Don’t let challenging personalities affect your work.

• Think about what will be important 5 years from now.
Advice

• You can’t do everything all at once and sometimes you just can’t do what’s asked.

• It takes time to build a donor relations program and you must do it methodically.

• Choose your areas for success or improvement, and make sure each one is institutionalized and running well before taking on more.
Advice

Never forget that your role at your institution is as important as the role of the frontline fundraiser. You are responsible for maintaining the donor relationship, even if you don’t know the individual donor. You are a co-owner of that donor and all donors. The frontline fundraiser will never get back in the door for the next ask and gift if you aren’t right there standing beside them, assisting them, keeping the donor informed and feeling appreciated.
Advice

It can be discouraging sometimes to know that the person making the ask is paid more than you or gets more recognition, but take solace in work well done and the important contribution you make to bringing in every gift—and in the knowledge, I believe, that the trend is starting to change, with more recognition coming the way of donor relations professionals.
Resources:

Websites & Blogs
- ADRP website: ADRP.net
- Journal of Donor Relations & Stewardship: JournalDRS.com
- DonorRelationsGuru.com, be sure to look at the “swaps” under resources
- Tom Ahern - aherncomm.com
- TED talks, Edx.org, and coursera.com

Books
- Journal of Donor Relations & Stewardship, Book 1: Definitions
- Donor-Centered Fundraising by Penelope Burk
- Intentional Stewardship by Julia S. Emlen
- Effective Donor Relations by Janet Hedrick
- The Storytelling Non-Profit by Vanessa Chase Lockshin
- The 4 Pillars of Donor Relations by Lynne Wester
- The 11 Questions Every Donor Asks by Harvey McKinnon
- Rambam’s Ladder: A Meditation on Generosity and Why It Is Necessary to Give by Julie Salamon
- Think Like A Donor by Wayne Olson
- How to Win Friends & Influence People by Dale Carnegie
- The 5 Languages of Appreciation in the Workplace by Gary Chapman and Paul White
- Managing Change by Richard Luecke
- The Feiner Points of Leadership by Michael Feiner
- Breakthrough Creativity by Lynne Levesque
- Diagnosing and Changing Organizational Culture by Kim S. Cameron and Robert E. Quinn
- Seven Habits of Highly Successful People and Speed of Trust by Stephen Covey
- Crucial Conversations by Kerry Patterson and Joseph Granny
- Drive by Dan Pink
- Start with Why by Simon Sinek
- A Curious Mind by Brian Grazer
- The Originals: How Non-Conformists Move the World by Adam Grant

Publications
- The Chronicle of Philanthropy
- CASE Currents

Style Guides
- AP Style Guide
- Chicago Manual of Style
- newyorker.com/series/comma-queen
- Crane’s Blue Book of Stationery
Thanks for your contributions to this project!

Please email your notes from today’s discussion and any other thoughts or feedback to:

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