

Nonprofit News

Engage the Funder: The Good, The Bad and The Believe It or Not...

By Dawn Prall George

Imagine this - what if all an Executive Director or Chief Executive Officer (CEO) had to do to raise money for their organization was to ask for whatever dollar amount was needed and the answer was yes. In other words, every time the CEO or the Development Officers asks a funder or a major donor for money to support the organization and the mission, the funder would write a check and that was all it took. After all, the funder must already know the organization is doing good work, helping change lives, making an impact on the community and all that is needed is money to do that, right?

Wrong. Buzzer. If the leadership or someone in the organization doesn't tell them how lives are changed, how many lives are changed, who, what, when and where, they can't possibly know. The operative phrase is— leadership or someone in the organization. Effective communication with funders (and major donors) is integral to a robust, viable fund development program and creating sustainable relationships with funders. Just like everything else, communication with funders requires an ongoing commitment at the highest level of the organization. It is a commitment of organizational resources, strategic capital and accountability.

Does your respective organization have a commitment to a funder communications plan at the executive level? Is it effectively operationalized?

If the answer is yes, bravo! The organization is on the right track. If it hasn't

been done so recently, it would be a good idea to perform a diagnostic, an assessment - a reality check of sorts to evaluate the process and the efficacy of the plan. It is worth the time and effort to check in with the team (see below) across the organization to ensure that everyone is doing their part and truly understands the funder communications process. What should ultimately happen is that by simply going through the assessment it will make a difference. Any issues or problems that are identified will be brought to the surface and a solution will be recommended and put into action. Conversely, if it isn't broken, don't fix it. The team will be incentivized and motivated to keep doing good work and the funders will continue to feel informed and in touch with your organization.

If the answer is no, then now is the time to make that commitment and develop a funder communications plan that the leadership team can effectively execute. Keep it simple and practical but most importantly – get started. Sending the message to funders that they are valued relationships and not just last minute deadlines will help position the organization for greater funding success. It makes it worth taking the time to develop a plan.

In either case, here are a few ideas to help get started:

Convene the team including the Executive Director/ CEO, Fund Development leadership, Accounting/ Finance, programmatic leadership, a

Fall
2012

936 Easton Rd.
PO Box 754
Warrington, PA
18976
&
163 S. Broad St.
Lansdale, PA 19446
215-343-2727
www.catalystnonprofit.com

Continued from page 1

line manager on the front lines doing service delivery, IT, (if your organization tracks impact via technology), and Marketing & Communications. *(The team will vary depending on the size of the organization and the org chart)*

Review the list of current, potential (pipeline) and past funders – generate the list based on the past three to five funding cycles or fiscal years and answer some of these key questions – *Are we communicating with funders? If yes, is our funder communications plan working with each individual funder? Overall? How do we know? Are we maximizing the opportunities to build relationships with funders? Could we do better and where specifically is there room for improvement?*

Grade Your Performance as a peer or self evaluation exercise that measures what works and what doesn't. Start by creating a grid of key performance indicators based on the salient points of the review discussion. Each team member should assign a grade to each key indicator. This can be done on a per funder basis and/or overall. Keep it simple but meaningful and measurable. Here are some examples:

- ◆ Master Mailing List – *i.e. Is the funder on the mailing list so that the program officer received an invitation to the grand opening of a new site?*
- ◆ Communication Tools and Frequency- how, when, who and how often did we “touch” the funder
- ◆ Compliance – did we comply with their standard reporting requirements of the grant?
- ◆ Financial Data: Overspend? Underspend? Why? Were we fiscally responsible with their funds? Did we share pertinent financials even if they didn't ask for them? Did we contact them if we had budget questions or any changes we needed to make during the funding cycle?
- ◆ Outcomes: How did we communicate what we did with their funding? Did we “show” them impact *i.e.* Invite them to a 6 month site visit, or email them a video link showing results of the program they funded. The organization may not have solved homelessness in the city yet but, telling a program officer what has been accomplished in three key zip codes is worth picking up the phone and then sending a follow up summary email.

Final Assessment - compile the key performance indicators grading and review the results within the group. What do the results tell you? Is your organization's funder communications strategy fully operationalized? Is it working? What is not working? Why?

Proactive always trumps reactive but, it is rarely simple and not always easy to be in a proactive mode. Even when you have a plan with thoughtful strategies and a process, invariably things slip through the cracks, people get distracted and workloads need reprioritized on a regular basis. That is the nature of the non-profit beast. It is easy to fall into the procrastination black hole especially with communication to funders. Reacting to a funder will most likely have a negative impact on the relationship and the prospect of continued funding. Unless they specifically tell you, the majority of funders do want to hear from you and not just at proposal or report deadline time. They want to hear the good, the bad and the “you may not believe this but...” Communicating will involve them and that is really what they want, to be involved and to know how their support is making a difference. Engage the funder or the donor – you will be glad you did.

For more in depth discussion, additional ideas and strategies you can put into practice – please join us on October 23rd for **Communication & Community Impact: Critical Components in the Funding Relationship** *(see page 4 for more information)*.

Feedback? Questions? Ideas? Please feel free to share your thoughts - contact Dawn Prall George at dawn@copperbeechconsulting.com

**Dawn Prall
George**
Principal,
CopperBeech
Consulting
*Helping
Organizations
Advance to the
Extraordinary*

Client of the Quarter



A Woman's Place is a community-based social change organization committed to the empowerment of women and to ending intimate and domestic violence for all.

A Woman's Place has served Bucks County, PA for more than 35 years. As the only domestic violence organization in Bucks County, Pa, they provide a full range of assistance and support services for victims of domestic abuse and violence and their children, including a free 24-hour confidential hotline, a full-service residential shelter, individual and group counseling, legal and medical advocacy, and a children's program. As domestic abuse and violence is a community issue, AWP also provides comprehensive community-based domestic violence training, education, outreach, and advocacy.

The issue of domestic violence is one that reaches across gender, age groups, and social economic strata. One in four women will experience domestic violence in her lifetime and one in four adolescents, girls and boys, will experience violence in a dating relationship before graduating from high school.

Each year

- ◆ AWP provides free, private, and confidential counseling services to approximately 4,000 victims of domestic abuse and violence
- ◆ AWP provides free, private and confidential emergency housing to 75-100 families
- ◆ AWP educates over 18,000 individuals, including students, professionals, community members and more.
- ◆ AWP invests in training between 100-200 volunteers each year in an effort to control program expenses without compromising quality of service delivery.

Since 2009, AWP has seen a 24% increase in services. During this same period, AWP has experienced a 15% cut in state and federal funding.

Critical programs delivered to victims of domestic abuse and violence, their children, and the community include:

Counseling Program AWP direct services bridge traditional advocacy to empowerment counseling on an individual basis, creating change one life at a time. This dual-purpose program addresses the needs of victims while working to identify and address barriers to create lasting change. Special programs address the needs of children and victims over 50.

Hotline AWP's hotline **800.220.8116** is available to anyone 24-hours a day. Counselors answering the hotline are able to:

- ◆ Provide information about domestic and dating abuse and violence
- ◆ Give referrals for other organizations
- ◆ Provide support for victims of domestic and dating abuse and violence as well as for friends and family members who call
- ◆ Access to all AWP services and information.

The hotline is the gateway into the entire organization.

Shelter AWP's full service shelter is in a confidential and secure location. Shelter services:

- ◆ Provision of a safe and nurturing environment
- ◆ Provision of food and clothing
- ◆ Counseling, support, and advocacy
- ◆ Financial, housing, employment, education, and legal assistance

Legal Program Combining advocacy, assistance, and first response services, the Legal Program helps victims of domestic violence navigate the criminal and civil justice systems, while providing ongoing advocacy and training to individuals, agencies, and institutions within the justice system.

Education & Training Program AWP builds the community's capacity to prevent violence and strengthens community knowledge and skills by educating providers, fostering coalitions, and changing practices that promote violence.



*Best Wishes to
Donna Byrne
Executive Director
On her retirement
after years of hard
work, dedication and
passion for the
mission of
A Woman's Place*

There are many opportunities for investment and partnership with A Woman's Place from attending or sponsoring a special event to recycling cartridges and/or cell phones.

Of course, like most not-for-profit organizations AWP is largely supported by individual contributions, so a direct donation is always welcome.

For additional information, visit AWP online at www.awomansplace.org or contact them directly at 215-343-9241

2012 Catalyst Center's Nonprofit Management Training series

October 23rd 8:30-12:00pm

the Funding Relationship

Dawn Prall George, CopperBeech Consulting

Communication & Community Impact: Critical Components in

The relationship an organization has with a funder is a 2 way relationship that is critical to success. Now more than ever, effectively communicating the impact your organization is having on its constituents and within the community can mean the difference between a grant proposal that is funded or one that is denied. Learn effective and proven strategies and methods that can improve and strengthen the relationship.

November 13th 8:30-12:00pm

Michelle Landis, Action Coach

Time Management, The Art of Getting Things Done

The effective achievement of goals relies specifically on how you manage your time. Join Master Business Coach Michelle Landis from ActionCOACH as she helps you uncover the secrets of time management in a way that will deliver focus, accountability and results.

To Register: visit the Training and Events page of www.catalystnonprofit.com or contact Liz Vibber at 215-343-2727

Seminar location: PA Center for Biotechnology 3805 Old Easton Rd. Doylestown, PA



Thanks to the generosity of
MileStone Bank,
There is no registration fee for the Fall seminars

Subscribe to our monthly e-newsletters
by contacting lvibber@bbco-cpa.com

Fall 2012

Catalyst Center for Nonprofit
Management
PO Box 754
Warrington, PA 18976

