

WASHINGTON ARCHITECTURAL FOUNDATION – Training For Board Members

Creating a Culture of Philanthropy

It's important for any organization to put into place the elements that foster and sustain a **culture of philanthropy**.

A Culture of Philanthropy (as described in the 2013 study "Underdeveloped" conducted by CompassPoint in California) is where an organization's values and practices support and nurture development. Fund development and philanthropy are valued and understood across the entire organization – staff and board. Everyone is deeply engaged in fundraising.



In brief, if an organization creates the success conditions in which fundraising and philanthropy can thrive, it has a greater chance of raising support to sustain their charitable work. Those condition including things like having the right tools and systems in place, making sure that donors are at the center of the conversation, and that there is a shared accountability across both staff and board for the organization's achieving its fundraising goals.

One of the first steps in creating a culture of philanthropy is that EVERYONE at the organization can and should serve as an *Ambassador*.

Being an ambassador

- It's like being a one-person fan club for your organization, except you're not alone!
- Being a good Ambassador means being a good communicator. It comes down to being able to tell stories about impact and emotion.
- When you get people engaged in and passionate about your organization's work, contributions are almost an "accidental" by-product!



EVERYONE AT AN ORGANIZATION SHOULD BE ABLE TO DO THE FOLLOWING:

- 1. Engage in relationship building**
- 2. Promote philanthropy**
- 3. Articulate a case for giving**

For WAF Board Members – Consider these ideas:

- Are you ready to do that? (if not, what do you need?)
- Do you have an "emergency ask" ready in your back pocket? (take the time now to plan one)
- Don't be caught off guard! (practice)

Relationship Building, Storytelling and Conversations
How they all lead to good fundraising!

A Tool for WAF Board Members



First – STORYTELLING – Your pathway to fundraising!

Good Storytelling = Good Solicitation

- You should be able to tell someone a story about why the Washington Architectural Foundation is important.
 - *What impact is WAF making? In DC, in the field? For the future of architecture, design, the lives of young people?*
- You should also be able to tell a story about why you contribute to Foundation.
 - *What has giving to WAF meant to you personally and/or professionally?*

Emphasize EMOTION and IMPACT

What works for good storytelling works for fundraising! These elements *all* come into play when you are making a strong solicitation.

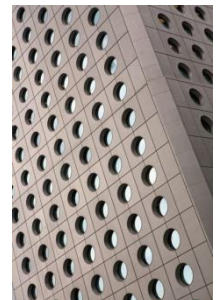
- **Focus** and **clarity** of your message is critical.
- **Honesty** and **authenticity** is really motivational.
- Putting yourself in the **mind of the potential donor** is essential.
- *Using emotional links to draw your prospect in works all the time.*



Storytelling Transforms Fundraising; Transaction Turns Into Transformation

- First gifts tend to be transactional.
- Renewed or increased gifts are part of the transformation.
- Stories and engagement are part of leading your donors and prospects to that.

Donor retention is critical to long-term sustainability. Most nonprofits really fall down on this. It is essential that you engage that first-time donor in such a way so as to ensure that second gift!



SECOND – Having CONVERSATIONS with People about WAF

BEFORE the Conversation:

- Gather as much information as possible about the person (or firm or business) with whom you will be meeting.
 - Important information may include: past involvement with WAF or AIADC, affiliations with similar nonprofits, and demonstrated interest in the mission.
- Go into the conversation with a *specific objective* (e.g. to seek their advice, to ask them for something, to explore their interest in serving on the Board of Directors, to invite them to serve on a committee, or simply to tell them about the organization, etc.)

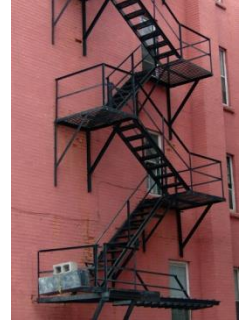
DURING the Conversation:

- Introduce yourself. Tell them what your role is with WAF.
- Tell them about the Foundation. Don't overwhelm them with too much information; give them enough so they have some context.
- If you know what may interest them most about WAF, connect your conversation to that. (For example, if you know they like the human story angle, have one ready to share. A scholarship story for instance, or the connection between CANstruction and the Washington Area Food Bank)
- Depending on the goal of the conversation, each individual will receive details on a specific aspect of the organization. For example:
 - If you think you have a donor prospect, describe briefly the important role that philanthropy plays in making your work possible and begin to gauge their interest.
 - If you think you have a potential volunteer, tell them about the Foundation's programs and what a critical role volunteers play in all the programs: AIS, CDS and CANstruction and begin to gauge their interest.
- If the initial goal of the conversation isn't being met (i.e. if it looks like they're not "biting") there are many other ways to engage an individual.
 - Ask for advice and feedback on WAF's programs and plans and how the organization can best get the word out to various constituencies, such as chapter members, firms, allied professionals, etc.
 - You can ask them for names of potential donors, Board members or volunteers. (e.g. "Who else do you think should be hearing about this work?")
- Inform them of and promise to invite the individual to an upcoming event or activity (if appropriate.)
- Let them ask questions! (and if you don't know the answer/s, it is perfectly fine to say so and then tell them when you will get them an answer.)
- The goal of every conversation should be setting up the "next phrase" in the conversation.
- NOTE - Remember to *really listen* to what the individual is saying. Don't get stuck in the "script" of how the conversation is *supposed* to go. Much can be learned from the detours that conversations often take. Especially when it comes to financial contributions, the more you can respond to an individual's personal concerns and values, the easier it will be to secure a meaningful gift.

THIRD – Telling WAF’s story – and Connecting it to Fundraising

Remember the importance of “Emotion and Impact?”

Everyone– staff members and board members – should be able to do the following:



- Share 2-3 important facts about your organization and/or the work that it does (Impact)
 - *If you had just a few seconds, what facts about WAF would grab someone’s attention or really drive your point home?*
 - *For example, you might want to start with some of the great “numbers” that were used at the 2013 Fete.)*
- Tell 2-3 meaningful stories about the Washington Architectural Foundation’s work or impact (Emotion)
 - *Stories can be yours or they can be borrowed, but they must be authentic; stories can also be about you!*
 - *For example, what have YOU learned or discovered by being a donor and board member?*
- Verbally link funding to your organization’s accomplishments
 - *Help people to clearly understand that the Foundation relies on the support of others to get its great work done.*
 - *For example, even though AIS uses many many volunteers, that program still requires actual funding to pay for staffing, materials, etc.*

FOURTH – During the Conversation – How to Respond to Things People Say

It’s OK to say the words: “I don’t know.”

- “That’s a great question, and I wish I had a good answer for you right now. Let me get that for you, and I will get back to you within a week. How’s that?”
- “I don’t know, I’ve only been given the high level summary of this, the details you want are really being handled by our wonderful staff. Can I have our executive director call you?”

Be ready to talk about YOUR giving and YOUR involvement

- “I’m so glad you asked! Our firm is very pleased to be one of the first to give this year, and I couldn’t be more proud. I hope your firm will join ours!”

- “You know that I prefer to keep my giving amounts private, as I feel that’s a personal matter, but I can tell you that WAF is in the top three of my philanthropic priorities! That’s how important it is to me!” OR “... the gift I give to WAF is one of the largest I give to any nonprofit! I hope you will think about making a gift that’s meaningful to you.”
- “I’ve seen some incredible things through my involvement with the Foundation. I would love for you to see some of the things I’ve witnessed. I’d be happy to show you _____ and let you see firsthand what your support will help make possible.”

If they raise something controversial; or you find that they have an axe to grind

- “I am really glad that you felt comfortable to share that with me. Clearly this is a matter that’s important to you. While I cannot solve your issue today, I can get your concern directly to a member of our staff. May I do that?”
- “Yes that certainly is a big issue that’s attracting a lot of attention right now, but I’m eager for us to focus if we can on the issue that the Foundation is working on right now. If this isn’t a good time to talk, perhaps we can reschedule.”

If you want to move to the “ask” portion of the conversation (assumes you’ve been talking about the program/organization/campaign, assumes a “relationship” even if it’s only 30 minutes old)

- “You’ve asked some great questions, and clearly you are interested in this program. Let me tell you more about how we are making this happen.”
- “It is indeed a great program. I’m so glad you think so. And I want to tell you that great programs require great resources, and that’s what I’d like to talk about now.”
- “Long-term we think that this program/project is sustainable because we’ve identified a range of sources of revenue to keep it going. Funding from grants is one of them, but so is support from firms and chapter members like you and me as well. I’d like to show you our plans for making that happen.”
- “I’m always happy to talk about our programs, but I really want to get to the real reason I’m talking with you today, because we need your help.”

If they say, “No” – Thank them.

- Explore if there might be a better time in the future; were there other decision makers that needed to have been present
- Thank them for their time and openness to your request
- Invite them to – stay in touch, come to something, stay on the mailing list etc.

If they say, “Let me think about it” – Thank them.

- Be clear about next steps and time frame
- Ask them what other information or materials they might need

- Follow through – on being back in touch and on getting materials to them if promised

If they say, “Yes” Thank them.

- Be clear about next steps and the details
- Ask them if they know others who should learn about the Foundation and would they be open to making an introduction
- Send them a thank you note (or email) afterwards (you can do that regardless of their response.)

After ANY Conversation:

- Share a formal report with staff and appropriate volunteer leaders after each conversation that details the conversation, the follow-up steps, as well as any advice and referrals that were given by the individual during the conversation.
- This valuable information will be logged into the notes field of the donor database so that WAF can keep good records of the conversation for future reference.
- As you share this information with others, you can continue to refine your own strategy, and to offer perspective and guidance on future contacts with others.
- This type of specific information will also help to identify potential opportunities (or roadblocks) to WAF’s plans for the future. It will also help the staff to efficiently identify particular people and organizations that should be contacted.
- Send a personal thank you note to the individual thanking them for their time and reconfirming the outcomes of the conversation.
- Follow up with the individual as promised in the conversation.

Exercise:

If they say this – you say what?

Objection	Response
How is the Foundation different than the AIADC chapter?	
Does Washington really need this kind of help? Aren’t there other groups who do this?	
I don’t see how this benefits my firm/company, so I don’t know if I should do this.	

Objection	Response
If WAF does so many of its programs using volunteers, why do you need my money?	
I can't make a decision right now, I need to think about it.	
How can I be assured that my money will be spent wisely? I don't want it wasted!	
I already support an organization that works with young people in Washington. OR I'm already engaged with another organization in this field. (DC Preservation League, Howard University, National Trust, Trust for the National Mall, etc.)	
I had a bad experience as a volunteer once.	
I already pay enough in dues to AIA. Why do I need to give above and beyond that?	



THE SOLICITATION PROCESS

Step by Step

Get Ready

- **REVIEW** your stuff. How are you going to tell the WAF story?
- **PREPARE** yourself; will you need a script? What's *your* story?
- **LEARN** about the prospect. Who are they, what are they interested in? No single strategy will work for everybody.
- **PRACTICE!** Is anyone going with you? Do you know who is going to say what?

Get Set

- **CALL** your prospect. Try not to do this by letter or email.
- **BE UP FRONT** about the call and your role. "I would like to set up a time to meet with you to talk about WAF and our programs."
- **ASSURE** them - it won't take long, and you can do it at a time/place convenient to them.
- **INSIST** on a personal meeting. "*Our schedule is really tight; can't I just send you something in the mail?*" Try: "Please wait until we've talked. I've got some amazing stories to tell you, and I know you're going to want to hear them."

Go!

1. Meet the person as promised. Thank them for their time, and their support/interest.
2. Bring them up to speed. You can use materials, but do not let them get distracted.
3. Tell the story! Make the case. Use your own natural style. Be yourself! But as you speak – do as much listening as you can. Hear what the prospect is "saying."
4. Link WAF's plans with how they might meet the needs of the donor. Remember, you should have been listening to the prospect all along.
5. Refer to your own gift as well as to those of others.
6. Suggest a *specific gift, gift range or opportunity* for the person to consider. Then ... MAINTAIN SILENCE. Let the person consider your request.
7. Respond appropriately to their reaction.
8. Present any leave-behind materials.
9. Discuss any follow up. (Keep any promises you make.) Thank them again for their time and/or for their gift and/or for considering your request.
10. Report immediately on your progress.

Helpful Hints

- Be a good listener, as well as presenter.
- Be your own charming self and remain positive throughout the entire meeting.
- Ask for a gift in a particular range and ask for enough.
- Before soliciting someone else, it is more effective if you have already made your own gift.
- Do your homework before asking; tailor the presentation to the donor's interests.
- Anticipate the prospect's objections and be prepared with answers.