

Ken Burnett's slides from his "how to" workshop delivered on 28th February 2020. Please note the images and text in these slides are copyright and not intended for anything other than your personal private use.

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BEFORE THERE WAS CHANGE. THERE WAS YOU.



IT STARTS WITH YOU

Vision. Collaboration. Transformation. **FIA 2020**

FIA CONFERENCE

HOW TO DELIVER A BRILLIANT DONOR EXPERIENCE.

KEN BURNETT

Fundraising How To...Track

IT STARTS WITH YOU



Vision. Collaboration. Transformation. **FIA 2020**



What are we doing to our donors?

Kate



Edith and Roger



Martin



Rick and Ellie



Carol



Frank



What are we doing to our donors?

Kate



We are losing way too many of them, way too soon.

Rick and Ellie



What are we doing to our donors?

Kate



We are losing way too many of them, way too soon.

Rick and Ellie





EVOLUTION: Three definitions of fundraising

The act or occupation of soliciting money for charitable organizations, political parties, etc. Also written fund-raising.

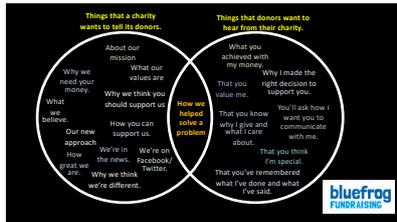
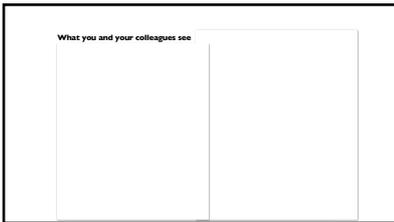
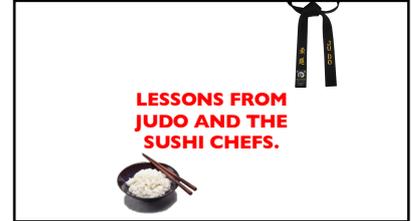
Wikipedia: How World Cancer Research

Raising money for a cause is a unique business area. Its benefits from many of the highest human emotions and is lucky enough not to be burdened by some of the basest... Fundraisers are members of a profession that is one of the world's most powerful catalysts for change. Without the money raised by fundraisers, there are no good works.

Antoinette Fundraising 1992

Fundraising now is about all aspects of the supporter experience. How you communicate with donors, understanding your 'why', asking properly for money and delivering fabulous supporter care and feedback.

Donors for Life 2017



HOW HE BECAME A TARGET FOR COMMENT

VICTORY!

After Mark's tremendous generosity in donating £4,000 to charity, donors who pay no attention to his generosity.

Note this.



We'll need a revolution in our thinking to change this.

"The conventional 'volume' fundraising let them down. How can we stop that happening again?"

Kevin Schulman, DonorVoice
24 January 2020



The real enemies that prevent the donor-based approach

- Short-term thinking.
- Targeted mentality.
- Increasing expectations.
- Under-investment.
- Risk aversion.
- Precedent/Copycat culture.
- Laziness.
- Decline in testing and innovation.
- Silos.
- Wrong people.
- Wrong kind of training.
- Poor leadership.
- Lack of concern for non-responders.
- Taking the donor for granted.
- Simply too much stuff.

'The way to raise more money is to ask more people for more cash more often and more vigorously.'

Other than nothing, what could we do about this?

THE COMMISSION ON THE
DONOR
EXPERIENCE

Transforming fundraising: how changing fundraising's culture will make donors feel great about their giving and the difference they make.

Twelve obvious actions to turn the tide

- Be really, really nice.
- Integrity. Doing the right thing by donors, always.
- Well informed, well trained, well led.
- Open transparency and honesty.
- Controlled egos and no tricks.
- Brilliant stories: the truth, told well.
- Reciprocity: give before you get.
- Great products and propositions.
- Much better evidence of 'the difference donors make'
- Continuous donor choice - positive opt-out, regularly given.
- Always give more than is expected.
- Invest boldly, wisely, sufficiently.

**THE 5 Fs:
FAMOUS
FOR
FREQUENT
FAST
FABULOUS
FEEDBACK**



Seven ways Botton can help you

There are seven ways Botton can help you. We'll do our best to make sure you get the most out of your experience. We'll do our best to make sure you get the most out of your experience.

- 1 By giving you the chance to decide when**
We'll give you the chance to decide when you want to visit. We'll do our best to make sure you get the most out of your experience.
- 2 By sending you free advice**
We'll give you free advice on how to get the most out of your experience. We'll do our best to make sure you get the most out of your experience.
- 3 By showing you and your friends 100 in Botton**
We'll show you and your friends 100 in Botton. We'll do our best to make sure you get the most out of your experience.
- 4 By sending you a list of**
We'll send you a list of things to do in Botton. We'll do our best to make sure you get the most out of your experience.
- 5 By giving you information on Botton's history**
We'll give you information on Botton's history. We'll do our best to make sure you get the most out of your experience.
- 6 By representing your wishes**
We'll represent your wishes. We'll do our best to make sure you get the most out of your experience.
- 7 By sending you information only if you want it**
We'll send you information only if you want it. We'll do our best to make sure you get the most out of your experience.

THIRTY YEARS OF GIVING DONORS CHOICES.

THIRTY YEARS OF FUNDRAISING RESULTS TO DIE FOR.

Botton Village results

Overall response – 31 per cent

- Donors – 24%
- Large donors – 43%
- Multiple donors – 51%

Christmas only – 50%

Information only – 14%

Some more lightbulb moments ... that will transform how we fundraisers raise our funds.

This Room Is Equipped With Edison Electric Light.

Do not attempt to light with match. Simply turn key on wall by the door.

#1 Lightbulb moment

Obviously, when we ask we should always ask properly.

ASKING PROPERLY
THE ART OF CREATING FUNDRAISING

George Smith, 1996

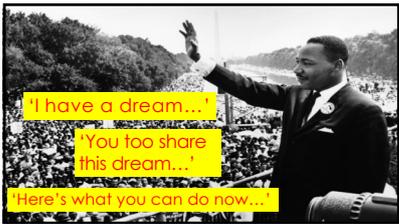
'My mother always told me to ask properly for things. I was told off if I was impolite or over-aggressive. I was reprimanded for asking in sloppy language or incomplete sentences. I was scorned for asking for the impossible. I was honoured when, on occasion, I did manage to ask properly.'

5 REALLY BIG THINGS I KNOW ABOUT ASKING PROPERLY

1. No pressure, ever. Always reinforce this: whatever you give is just fine with us.
2. Fundraising isn't about money.

Fundraising isn't about money...

- It's about work that urgently needs doing.
- It's about one person talking to another about something they both care deeply about.
- It's about inspiring people to believe they can make a difference, then helping them to make it.
- It's about building sustainable, mutually beneficial, long-term relationships that deliver **lifetime value** to both donor **and** cause.



- 5** REALLY BIG THINGS I KNOW ABOUT ASKING PROPERLY
1. No pressure, ever. Always reinforce this: whatever you give is just fine with us.
 2. Fundraising isn't about money.
 3. Asking properly is not about what's right for you. It's about what's right for your donor.
 4. Crucial things to get right: preparation, consideration, right cause, right time, right place, right amount, right person to ask.
 5. Accept a 'No' cheerfully and unhesitatingly.
 6. Reciprocity: Give/give not just give/take.



Meet the donors

Eleven things we could easily change just by listening better to donors

- No pressure, ever. I wouldn't like my granny to be pressured. Grandads too for sure.
- "I want to make a real difference". Tell me about the difference I'm making. "Did my gift go through?"
- Feedback. It's how they see the difference, what their support achieves.
- Integrity. Do the right thing. Always. Show your passion, but be led by your values.
- Respect. And reciprocity. Listen to what we think and want.
- Send less, but better. Only send intelligent and welcome communications.

Meet the donors

Eleven things we could easily change just by listening better to donors

- "Know me and show me you know me".
- Premiums came in for a bashing. "Don't send me stuff" seemed to be the message. Premiums, raffles and prizes diminish donating.
- Emotions. Initial support for 'their' causes had come through personal emotional connection. But emotion was talked of quite fearfully...
- Transparency and accountability. Charities need to be open, clear, honest and accessible.
- Admin and salaries. Though not unreasonable, donors don't want their gifts lost on high admin and salary costs.

Meet the donors

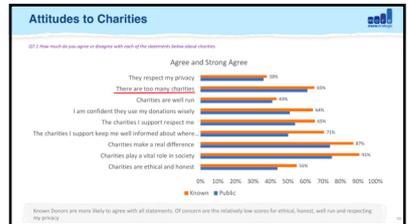
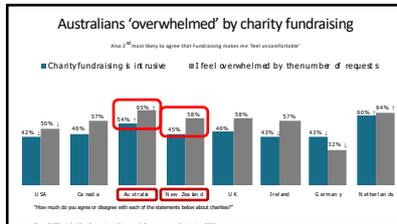
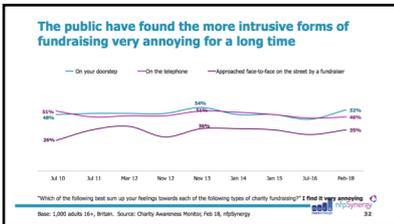
IoF Convention Meet the Donors session. Feedback from the evaluation forms.

- Great to hear from the donors mouths. Inspiring.
- It was very interesting hearing from a wide variety of speakers - may be good to mix it up a bit, having direct questions to direct speakers enabling audience to have detailed answers. Overall a great insight.
- Best session of the day!
- Good advice but far more discussions to be had - needed more time for audience questions.
- The donor panel was excellent. A refreshing change from industry people presenting.
- The effect that "thank you for having me" still has on Daphne is/was the very essence of charity, and thus fundraising at its best.
- Good to hear from real donors, however some more variety in answers would have been helpful - especially since questions were prepared in advance.
- Daphne was amazing! More time for questions would have been good.
- Great to hear from the donors. Took good ideas away with me.
- Wonderfully insightful session. More of this please, maybe with corporates etc.
- Microphone volumes weren't very good

Meet the donors

IoF Convention Meet the Donors session. Feedback from the evaluation forms.

- Best session so far. Good job
- All very good. Great session
- Very interesting to hear directly from donors, their good and bad feedback.
- Like the panel set-up. Diverse opinions, views and knowledge in depth answers



12 pillars of lasting change THE UNIVERSITY OF DONOR

1. Integrity and consideration underpin every contact.
2. Donors will be in the driving seat.
3. Charities will recruit the right people.
4. Every communication should leave the donor feeling better about the causes he or she supports.
5. Wonderful people to deal with.
6. Fundraisers are always learning.

12 pillars of lasting change - part 2 THE UNIVERSITY OF DONOR

7. Leading by example, from the front.
8. New views of risk, investment and return.
9. Increased aspirations of excellence.
10. Improved public passion for and commitment to fundraising.
11. Innovative and donor-centred communications.
12. A new promise to donors.

#2 Lightbulb moment

If giving is a good experience, donors will do more of it.

If it isn't, they'll soon stop.

This isn't rocket science.

#3 Lightbulb moment

Integrity is not something you show others. It is how you behave behind their back.

The credit

This isn't rocket science.

#4 Lightbulb moment

You'll know your donor-centred thinking is making progress when...

...you stop saying 'we do this'

...and start saying, 'this is what you make possible'.

CDE 6, the use and misuse of emotion

#5 Lightbulb moment

Leadership is influence. It's that simple.

Leadership: What kind of leadership increases the chances that a charity will operate in a donor-centred way?

- Leaders have to act differently.
- Define, champion and reinforce what success looks like in terms of your supporter's experience with your charity, and why it matters.
- Build great relationships. Recruit much more carefully and deliberately.
- Culture: create a stable, adaptable, empowered environment.
- Treat supporters as complete human beings, rather than merely, for example, 'major donors' or 'campaigners'.
- Practice 'whole organisation' fundraising and continual learning.

CDE17 leadership for a great donor experience

#5 Lightbulb moment

A new approach to donors

gapmyworld

#5 Lightbulb moment

The board and the SMT

Charity boards and senior management teams need to change their mind-set to recognise that fundraising is good for both donors and beneficiaries, not a necessary evil.

Without the support of the board, the CEO and senior management team, donor-centred fundraising strategies will fail, or never get started.

Boards need to recognise that putting the donor at the heart of the charity is the responsibility of all the SMT and their staff, not just fundraisers.

CDE 15 the role of trustee boards and senior managers

#5 Lightbulb moment

'Every board should be an emotional board'

- 1) Start each meeting with a mission story.
- 2) Set up a 'Guest of Table' scheme.
- 3) Encourage trustees to visit projects and on return get them to tell an emotional story.
- 4) Decorate your walls and any other available space with emotional images and captions that tell your cause's story.
- 5) If your board members aren't natural storytellers, train them. Get them to be donors too!

Tessa Aspek, CDE 6 the use and misuse of emotion

#6 Lightbulb moment

Some donors are vulnerable

- Many people don't like to say no.
- The more generous you are, the more you are targeted.
- Supporters are overwhelmed by sheer volume of contact.
- Every supporter is different. Anyone can be vulnerable.
- Every organisation should have a specific policy on vulnerability.
- But **remember**, every UK charity criticised recently had a policy on vulnerability.
- All donors deserve respectful, appropriate and timely contact. This should be a matter of course, not the exception.
- Need to **invest** in supporter relationship management.
- Brief and reward quality of interactions rather than number of sign-ups.
- Get to know your supporters and put yourself in your donor's shoes.
- Believe in giving donors choice: the ability to control the relationship.

How many of you have a vulnerability policy in your charity?

CDE project 2 Fundraising and vulnerability

#7 Lightbulb moment

Words are precision instruments capable of taking us right to the heart of our donor.

- More precision with language. Less carelessness.
- Less 'we and us' language. More about what **you** achieve.
- Less monologue, more dialogue.
- Promote the charity's values and illustrate them consistently.
- Some terminologies are offensive: acquisition, renewal, upgrading, moves management, lapsed donors...
- Donor-friendly job titles. No more 'directors of targeting and segmentation' and 'heads of donor acquisition'.
- Less formulae. More agreeable surprises.

CDE project 1. The use and misuse of language

Careful, clean, precise forms of writing have nothing to do with the approach that gets people to donate.



Fundraising belongs to a messier, more passionate world that includes love letters, ransom notes, pleas for mercy and outbreaks of religious fervour.

Jeff Brooks
Future Fundraising News

Fundraising is a difficult, and at times a lonely job.

We can make this much clearer...

...by consistently doing things differently.



'Some of the reigning wisdom about what organisations need may not be true.

'Specifically we may miss when we focus on strategies, plans, training, evaluations...

'What organisations need are ways to change their structure, habits and fundraising ethos.'

Kim Klein

Great leaders begin by building the team

"If ever there was a great success, it was the creation of what I think was a super team, and actually I think sometimes maybe the only thing I do really well is surround myself with brilliant people."

#8 Lightbulb moment

Charities must recruit the right kind of people...

at least as passionate
for the cause as your donors are.

Go now.

...and train them brilliantly in how to deliver a consistently excellent donor experience.

ABSOLUTELY KEY IS RECRUITING AND RETAINING THE RIGHT PEOPLE.

CDE project 14 Getting the right people as fundraisers.

#8 Lightbulb moment

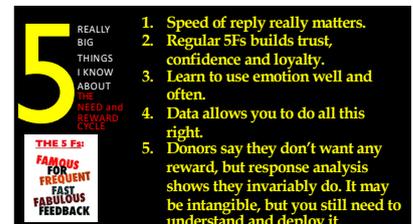
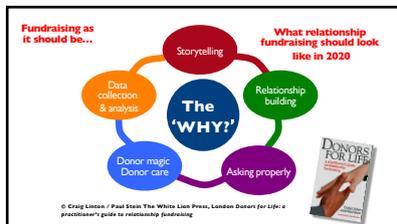
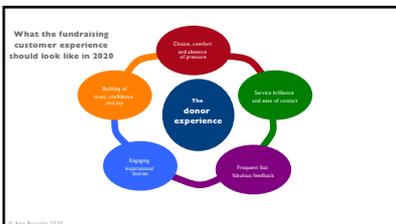
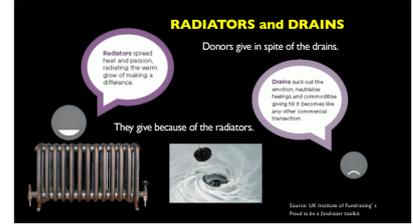
The German Coastguard



ABSOLUTELY KEY IS RECRUITING AND RETAINING THE RIGHT PEOPLE.



ABSOLUTELY KEY IS RECRUITING AND RETAINING THE RIGHT PEOPLE.



THE COMMISSION ON THE DONOR EXPERIENCE

Saying thank you appropriately is the best fundraising opportunity of all... if you do it right.

Recognition of this permeates all CDE projects.

CDE 4 Thank you and welcome
CDE 16 Creating a distinctive service culture.
+ 26 other projects

5 REALLY BIG THINGS I KNOW ABOUT SUPPORTER SERVICE

1. It's an investment, not a cost.
2. Everyone is part of supporter service. Instil the service ethic in all staff. And the 'staffing' ethic too.
3. CEO, SMT and board must buy in too.
4. Be the best at saying 'Thank you'.
5. Learn from the best in other sectors.

#10 Lightbulb moment

WHY DON'T DONORS STAY?...?

Please Stay Don't Go

AFTER 30+ YEARS OF DONOR 'MYSTERY SHOPPING' ROAD TESTS THAT SHOW CUSTOMER SERVICE IS THE PITS...
...DONORS CAN STILL EXPECT CHRONICALLY POOR SERVICE FROM THE CHARITIES THEY SUPPORT.

CDE 16 Creating a distinctive service culture

#10 Lightbulb moment

'Customer service and donor care should be seen as a driver of income and not as a cost centre.'

'Customer service should not be seen in isolation – include supporters and beneficiaries too, not just donors.'

CDE 16 Creating a distinctive service culture

#10 Lightbulb moment

- Be obsessed with great donor care.
- Work out where your staff spend their time – how much of it is talking to donors or cultivating donors?

'You need great donor service, either in house or with outside help, to keep your donors happy and to dramatically increase your income.'

'Since every person in your organisation is a fundraising representative, it's worth spending time clarifying roles, training staff to be the best they can be and treating any donors or prospects with the greatest of care and generosity.'

CDE 16 Creating a distinctive service culture

#10 Lightbulb moment

'A lady phoned about looking after sheep. We did not fob her off. We were tenacious in finding someone who could help, though it was not an area of knowledge for us.'

She left us £1 million in her will.

Phil Young, RSPB (Royal Society for the Protection of Birds)

CDE 16 Creating a distinctive service culture

sofii showcase of fundraising innovation and inspiration

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History | evolution | inspiration | effectiveness | Tools | techniques

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THE COMMISSION ON THE
DONOR
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For the
future
of
fundraising

**More lightbulb
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Thank you!

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