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Developing a culture of cooperation: The importance of internal relationships in program planning, outcomes reporting and donor relationships

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The RFDS VIC major donor program has
grown by 60% over the past 3 years!

STARTING BASE

- RFDS VIC has always had a strong, reputable brand profile.
- There has been a long-standing successful major donor and grants program.

INITIAL GROWTH STRATEGIES

- In commencing the new role, priorities were meeting the existing major donors and grantors, to ensure they knew me and were happy with their partnership to date.
- Ensured that the CEO was accessible for meetings with major donors and worked with him to ensure he was comfortable in that role.

Meetings with Major Donors

- Invite major donors for informal boardroom lunches with CEO, to thank them and discuss the impact of their giving.
- Prior to major donor meetings, information on donor giving is shared with all RFDS participants. How long the donor has been giving, the amount, to what programs.
- CEO asks what motivates the donors to give to RFDS VIC. Creates great engagement and discussion amongst the group.
- Donor back stories are great for outcomes reporting and case studies.
- The goal is to allow the donors to lead with lots of questions about what we are doing and what is next. We attempt to answer all their questions and give them materials to take away, on request.



*"Most of our funding is untied. This has come through **long-term, trusted relationships** where they instruct us to use the funding where it is most needed."*





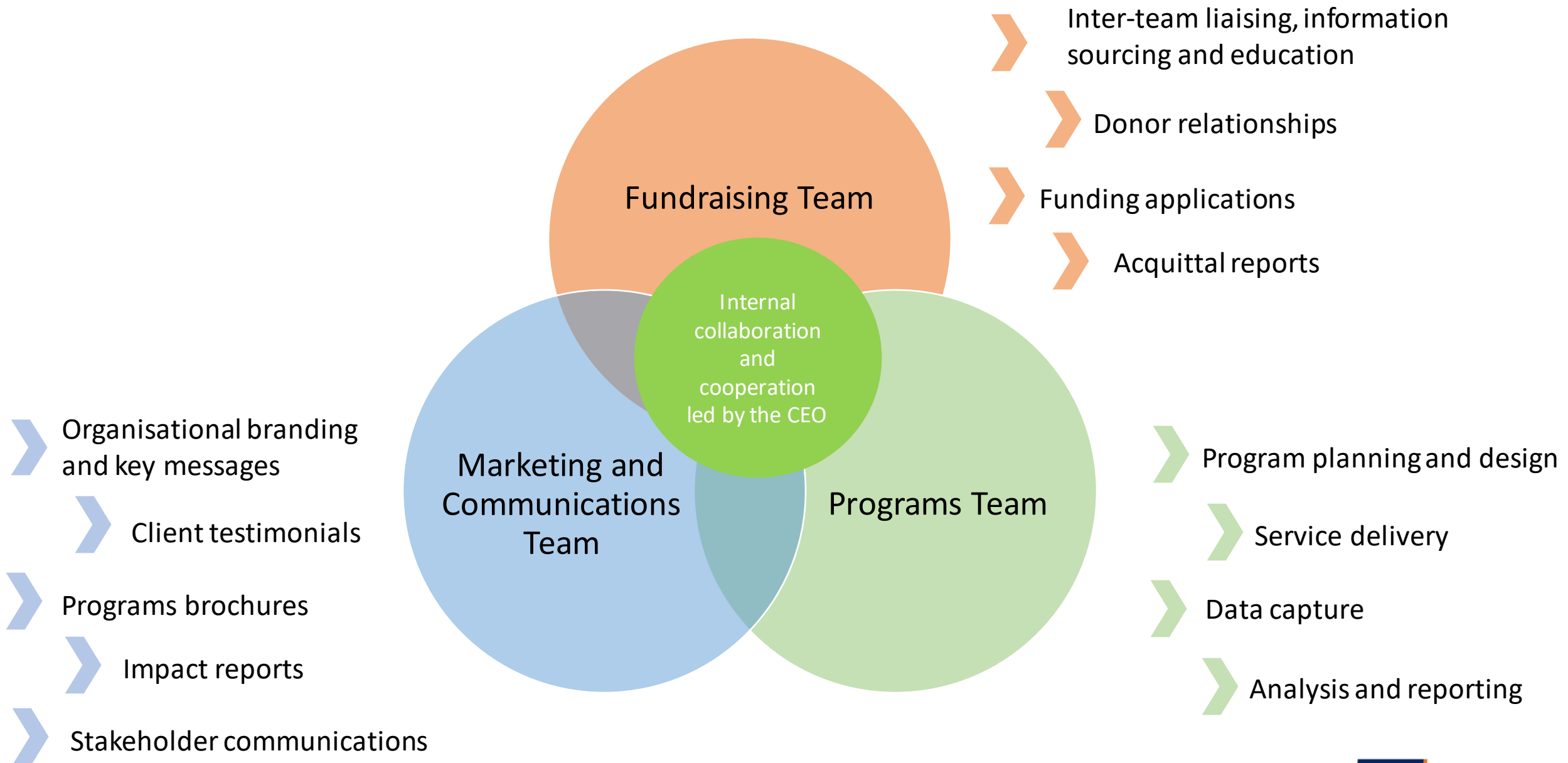
Collaborating with Program Delivery Teams

- Establish and nurture a solid relationship with the program delivery teams and educate them on each donor / funder's objectives and expectations.
- Program delivery teams are given Project Plan Templates to collate and source the information that major donors most often require.
- Project Plan Templates are updated every July, so there is always a current set of project information to talk to major donors about, and the fundraising team always have project needs at the ready.
- Program leads are involved in the submissions and acquittal content, so they continue to grow their understanding of the type of questions major donors ask.
- Program delivery and fundraising teams meet monthly to discuss funding needs and major donor updates.
- Programs team staff are happy to talk to major donors, with appropriate briefing.

Data and Reporting

- Record keeping is essential!
- Program teams understand funder reporting expectations and collect data that includes occasions of care provided, type of care and locations.
- Program teams are busy so regular education reminds them of the importance of data, case studies and testimonials for funding.
- Marketing and Communications team collects a lot of qualitative data and together with Philanthropy team produces Impact Reports in January and July, as well as written and video testimonials.
- Programs teams know when funder reports are due and work together with the Philanthropy Team to ensure reporting expectations are met.





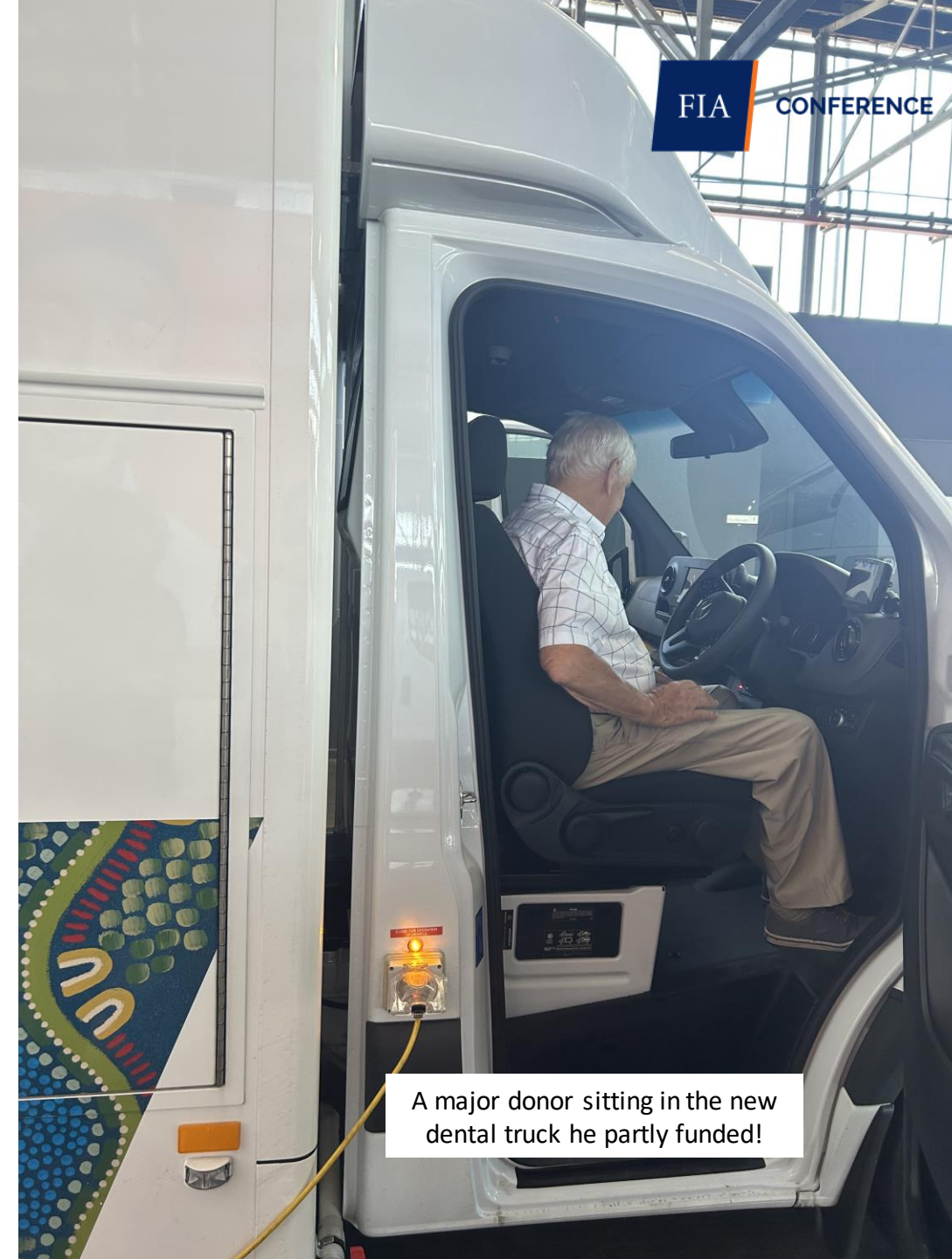


When things don't go to plan

- Be open and transparent every step of the way!
- Funders understand that the best of plans can go off track. They will work with you to come up with a workable solution for both the recipient and themselves. They don't want the funding back!
- Work with program delivery teams to capture program updates, including any supporting images or videos.
- Keep in touch with funders and share the updates from the program delivery teams.

Essentials for success

- Effective internal processes start at the top! Make sure the CEO understands that funders expect to speak to them about organisational plans, progress and funding requirements.
- Build a relationship with program delivery teams. Remove as many barriers as you can. Educate them on what funders expect and why.
- Streamline processes to reduce strain on people's workloads – project plan templates have made a huge difference.
- Monthly meetings between the teams have had a positive impact.
- Ensure the project team that will be delivering the funded project are involved with the submission development and are clear on the outcomes reporting expectations.



A major donor sitting in the new dental truck he partly funded!



Thank you

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