

CATHOLIC DEVELOPMENT + QUARTERLY +

An informational DIGEST to guide development personnel in the emerging field of development.

Volume X, Edition 4

DONOR RELATIONS

On many occasions, this publication has advocated that development is a ministry and that Catholic institutions should be in the business of serving people and bringing those people the Gospel message. An adage to remember in the work of development is that people identify with causes or institutions but they give to people. More specifically, they give because of the people involved at the institution -- both staff and Lay Leadership.

A recent survey indicated the five major reasons why people give, in order of importance:

- Convictions as to the institution's merits.
- Leadership.
- Future plans.
- Management.
- Taxes.

Lasting, spiritual, personal relationships are the key to effective development programs and major gifts.

DONOR RELATIONS VS. PUBLIC RELATIONS

One might ask if "donor relations" is simply a fancy phrase for "public relations." Think of public relations as a wide berth or shotgun approach to communications. A development newspaper mailed to all of the Catholic institution's publics would be an appropriate example of "public relations." Donor relations, however, is much more targeted, specific and personal. A good donor relations activity would be personalized and specifically directed to a donor or group of donors.

Since its inception, this publication has advocated the "four C's" of development:

- **COMMUNICATION.**
- **CULTIVATION.**
- **CALLS.**
- **COMMITMENT.**

That alliterative displays an essential development process. An effective development program COMMUNICATES with all donors, CULTIVATES relationships with donors CALLS on them regularly to inform, report, thank, propose and seeks faith and financial COMMITMENT from key donors.

Remember, major donors are not found. They do not jump from one institution to the next (although we all know donors who support a number of institutions). They are really created by good, strong, sound development programs.

Many Catholic institutions lament the fact that "...we don't have any major donors." Major donors aren't "found." They are "created" by effective, ongoing development programs which continually cultivate and report to donors on a regular consistent basis.

A good example of donor relations would be an annual luncheon and report meeting with donors/families with endowed memorials/scholarship funds. They would be presented an "early edition" of the Annual Report and a personalized update on the performance of their "endowed fund" and its impact on your Catholic institution.

DEVELOPMENT COUNCIL AND DONOR RELATIONS AS STANDING COMMITTEE

In the September, 1994 edition of the +*QUARTERLY*+ ("[The Development Council](#)") we outlined the ideal structure of a Development Council:

- Major Gifts.
- Annual Fund.
- Planned Giving.
- Memorials.
- Foundation/Corporate Gifts.
- Donor/Marketing.

Ideally, your Catholic institution would have a Development Council which would meet on a regular basis -- monthly or quarterly at minimum. The Donor Relations committee would report to the full committee on activities and programs. The subcommittees would be staffed by the development officer. The work of the subcommittees of the Development Council would mirror or reflect the job description/function chart of the development officer.

Listed below are a sample mission statement and some recommended activities for the Donor Relations/Marketing subcommittee:

- **DONOR RELATIONS/MARKETING:**
 - Promoting the "Good Works" of the Catholic institution and educating donors how to make gifts to the institution.
- **ACTIVITIES:**

- **Personal Reporting to Donors:** Personal meetings to report to donors about a previous gift, seek their advice or counsel is essential. Calls to inform, calls to report and calls to update are nearly as important as major gift calls.
- **Annual Report:** The annual report is an effective year in review, financial, donor recognition/education and updating document for your donors. It will provide donors a sense of direction as well as ownership. It can also have the effect of moving non-donors to first time donors as they get to review classmates, friends and other donors participate in the giving process to your Catholic institution.
- **Annual Liturgy/Luncheon:** This donor event can be a special opportunity to personally greet and thank key donors, give them an early distribution of your Annual Report, report to them on any recent campaign (see +*QUARTERLY*+ September, 1996, "[Your Campaign is Over. Now What?](#)") and its current status (total pledges, fulfillment to date, update on impact of the campaign case, etc.).
- **Newsletter:** "The mailman isn't the development director," but you can never have enough information in the hands of donors and potential donors -- regardless of what critics might say about "junk mail" and "wasting money." A donor newsletter distributed quarterly can go a long way toward educating, informing and thanking your donors.
- **Special Receptions/Events:** Your donor relations committee/program can assist with organizing regional alumni/alumnae clubs where you may have large clusters of alumni or alumnae. Planning and assisting with reunions as well as awards banquets can be effective donor relations tools.
- **Donor Recognition/Clubs:** The donor relations program should also include the creation of a sound, effective donor recognition in the form of saluting people for their record of service and generosity. A program where Catholic institutions can get an edge is the area of Donor Clubs. Most Donor Clubs are limiting to giving levels only. Your donor club should have benefits or activities (e.g., tours, recitals, art shows, etc.) as part of the "membership" of the club.
- **Photos:** Remember to shoot photographs as gifts and pleasantries at your events. Many personal relationships and major gifts have been cultivated through the simple task of taking photographs of people at events and sending the developed photographs with a kind letter.
- **Planned Giving:** The largest single gift your Catholic institution will ever receive will be a planned gift. Try to develop donor relations that involve planned giving information. Drop off planned giving information that you are comfortable explaining. Designate a gift, recognition or artwork for all donors who have planned to remember your institution in a bequest or other type of planned gift.

+*QUARTERLY*+ CHECKLIST

This edition's +*QUARTERLY*+ **CHECKLIST** provides a reference of different activities that you can select to use from time to time that will help to build warm, lasting, personal "donor relations."

800 OR 888 TOLL-FREE NUMBER: Toll-free phone numbers are inexpensive. Catholic institutions with donors outside of their immediate geographic area should invest in this service. It is an "add on" to any current phone line.

THANK YOU PHONE CALLS: One donor a week should be called, thanked and updated on the impact of his/her giving.

REGIONAL DONOR/ALUMNI CLUBS: Gather donors for special occasions in their geographic areas: conventions (NCEA, NCSC), workshops when you have travel plans direct you to donor geographic clusters.

PLANNED GIFT "GIFTS": Any donor that has informed you of an intended bequest or other type of planned gift should be presented a special gift for them to display in his/her home. Artwork, watercolor, painting of some visually stimulating rendering that focuses on your Catholic institution. Other prospective donors can see and inquire about this type of gift.

VIDEOS: Mail any videos on your institution to some of your better donors.

ON-LINE SERVICES AND E-MAIL: Try to garner E-Mail (electronic mail) addresses of donors and prospective donors. Any new alumni directories should include E-Mail. For many donors, E-Mail is still a novelty and contact through this medium can be beneficial. Place your E-Mail address on the masthead of your newsletter and as part of the return address information. Add and adapt for all communications (annual report, brochures, mailings, video trailers, etc.).

FOCUS GROUPS AND RETREATS: Consider having key donors, board members and other development leaders participate in focus groups, visioning sessions and annual or biannual retreats to focus and share ownership of these important development concepts.

The Omaha Development Institute -- the pioneering development program for Catholic institutions nationwide -- has underscored four basic principles of development:

- Quality Education/Ministry.
- Sound Business Management.
- Effective Public Relations
- Attracts People and Dollars.

Effective donor relations is effective public relations.

[[Return to the CDQ Online Index](#)]



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