# Session X Readings

Resource Development
November 2021

## Board Plan for the Next Three Months

Here's what I will do to engage my board members in…

**December:**

**January:**

**February:**

**Here are some possibilities to consider:**

A. Invite board members to an upcoming service project of ours
B. Ask them to make a year-end donation
C. Ask them to run an orientation activity for incoming board directors
D. Encourage them to launch a planning process to cover our next year or two
E. Ask them to connect us with a business that could support our work
F. Other: ________________________

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## Whose Support Will You Seek?

Think of one business whose support you would like to seek – either for funding, materials, publicity, or other resources.

**What are three-five ways your nonprofit would benefit from such a relationship?**

**What are three-five ways that company would benefit from such a relationship?**

**What would be a modest first step you and the company could conduct together to build trust and momentum?**

## Resourcefulness and Resources

"The defining trait of the great entrepreneur is his or her ability to creatively collaborate with other people. Each of us is limited by time and resources, but when you leverage others' time and resources, you create an environment with no limits."

*Jay Abraham*

"Intaxication: Euphoria at getting a tax refund, which lasts until you realize it was your money to start with."

*Anonymous*

" You must use the set system, that is *repetition* of each technique in sets for perfection. Apply all you've learned with *economy of motion*. You will double your speed and skill doing just that."

*Bruce Lee*

" When preparing to travel,
lay out all your clothes and all your money.
Then take half the clothes and twice the money."

*Susan Heller*

# What You Should — and Shouldn't — Do When Meeting with a Donor

By Isa Catto, artist and executive director of the Catto Shaw Foundation

The donor-grantee dynamic is essentially a platonic courtship that is subject to the same quaint but essential norms that govern any successful relationship: courtesy and engagement. Two recent experiences I had as a director of my family foundation — one a lovely meeting where the representative was poised, well informed, and engaged, and the other, which left me scheming for a quick exit — inspired me to pen a short list of things nonprofit representatives should keep in mind when meeting with potential donors. These tips apply to any meeting with a donor, but they are especially important for first meetings. This might be a refresher for some and common sense for others, but it all bears repeating. After all, you won't get a second shot at that first impression.

**1. Do your homework.**
Google is your friend. Unless you have stumbled across the rare person who has no internet presence and gives anonymously, there is usually a trail of informational bread crumbs at your disposal. Most potential donors probably have a profession and many dimensions that turn up online. Read annual reports of organizations that you know the donor or family foundation gives to, and identify giving patterns.

Research your contact. (But don't reveal too much; otherwise, you will seem like a stalker.) Check for details on GuideStar. Review mission statements and financials. The donor may be fully committed to other causes, and your cause may be outside of the donor's mission. If this is the case, come clean ahead of time and give the donor an opportunity to cancel the meeting. A foundation may not take unsolicited grant requests. When I encounter a potential grantee who has done her research, it's a good sign and inspires confidence for the organization she represents.

**2. Learn how to pronounce the prospective donor's full name ahead of the meeting**.
This only shows common courtesy and respect — and you really want to avoid being corrected right off the bat.

**3. Leave early for your meeting in case there are delays en route**.
I have often been kept waiting. That is a clear signal that the grantee values her time more than mine.

**4. Be present**.
Take your coat off. Put the phone away. Remember to smile and give eye contact. Don't fidget and yawn. One potential grantee couldn't stop yawning like a lion and did not excuse himself, so I thought I was boring him to tears.

**5. Be flexible, and do not impose your scheduling restraints on the person you have asked to meet**.
A new nonprofit leader was being introduced to members of my community, and I

agreed to meet him as a favor. The timing was terrible: I was in the midst of child-chauffeur duty, holiday activities, preparing for houseguests, the Christmas tree pick up, you name it. But I thought I could spare an hour to be part of the welcoming committee. I was wrong. At the last minute, I was rushed and asked to push up the meeting time, which seemed to aggravate him. That may have not been the case, but I did not know him, and his tone was billy-goat gruff. I was put off before we even met. These events served as a clear reminder to me to set certain times of year as off-limits for these kinds of meetings. My advice: If a potential donor suddenly seems stressed about a meeting, immediately and sympathetically offer to reschedule. And avoid scheduling year end crunch meetings when everyone is agitated and distracted.

**6. Remember tone, avoid platitudes, and repress being a know-it-all.**
You may know it all, but the smartest person in the room usually isn't the best representative of a nonprofit. A thoughtful listener is. I recently took the time to outline some ideas for the first meeting of a nonprofit director. He found some of them appealing and swiftly dismissed others with a telling lack of curiosity. He then concluded our meeting by saying, "You added value," as if I had offered a service. I found this phrase not only baffling but sexist. Any whiff of negativity and condescension instantly puts anyone off.

**7. Pick up the check**.
You asked the donor for his time, not the other way around, so it is customary to pick up the tab.

**8. Everyone appreciates gratitude**.
Thank the person you met by email within 24 hours. Then follow up with a written thank-you note that demonstrates you see the potential donor as a person, not a target. I recently got a nice note from a grantee who took the time to look at my studio website online and on social media. It was flattering and felt sincere and suggested that she saw me as something more than a money pot.

**9. Don't ask for favors during the initial meeting**.
Sometimes I'm asked for introductions to other donors or for more of my time. I do not make introductions without the consent of the other party, and when someone I just met asks me for access to someone, or for some other favor, a big red flag goes up.

**10. Avoid making assumptions.**
When a person can give, she is often stereotyped. Just because someone runs a foundation doesn't necessarily mean she has vast private wealth or an ability to spend with impunity from her own pocket or from the foundation's assets. Years ago, I boarded a plane and saw a nonprofit director sitting in first class. As I was passing her to move to the back of the plane, she looked at me and said: "*You* fly economy?" I was flustered and hustled to my seat. Be open and know that most donors are juggling the quotidian details of daily life like anyone else without personal assistants, staff, or private transportation. That kind of understanding will make for a better connection.

## Be Ready to Respond Quickly with a Case Statement File

A case statement file contains crucial details about your nonprofit. This master document enables you to respond quickly and thoroughly to grant competitions or prospective donors' requests for information. It is best to refresh this file at least annually to reflect changes in your staff, board, strategy, finances, programs, services, and impact. Designate one person as the keeper of the case statement file; this person should ensure that any edits get made to the master version and that the writing style stays consistent across all sections of this document.

These sections are important to include in a case statement file:

- Welcome to Our Organization
- Mission and Purpose
- Organizational Strategies and Goals
- Geographic Focus: Map and Relevant Challenges/Service Needs
- Issues We Address and Why They Matter
- Theory of Change/Programming Philosophy
- Program Delivery Purpose, Features, Audience Traits, Participation Levels, Dates, and Locations for Each Program
- Impact Evaluation Criteria and Methods for Each Program and Services
- Event Schedule throughout the Year
- Community Partners' Roles
- Community Involvement in Planning and Execution
- Organizational Leadership: Board and President/Executive Director Profiles
- Subject Matter Expertise of the Staff and Board
- Progress and Achievements: History, Milestones, Awards, and Testimonials
- Photos and Stories of Impact
- Financial Statements with List of Funding Sources and Resource Investments
- Donor, Endorsement, and Sponsorship Opportunities
- Contact Information

A case statement file can easily encompass a dozen-plus pages. Although it may take much time to create one, this process will hone your ability to tell your story. You may then be able to copy-and-paste sections when you are filling out requests for grants and donations, as financial supporters will often ask for the kind of information your case statement file will include. If you have this information handy, you can respond fast if you learn of, say, a tantalizing grant opportunity just before the application deadline. This document may also serve as a great piece to quickly educate new board and staff members about your work.

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## Fourth Quarter Sprint Calendar

Map your resource development activities for the rest of this year.

| Method | Late November | Early December | Late December |
|---|---|---|---|
| Mailings | | | |
| Posts | | | |
| Conversations | | | |
| Gatherings | | | |