

# TURNING OUTWARD TO ENGAGE DONORS

This tool will help you build stronger relationships with potential donors. Use the scale below to rate yourself against the five steps on the following pages.

ENGAGEMENT RATING SCALE	
RATING	DESCRIPTION
We've Got It	Feel good about saying they've got this step
Real Progress	Steadily improving and moving in the right direction. Still room for improvement.
Starting to Improve	Beginning to demonstrate genuine effort. Things are starting to get better.
Lip Service	Talking a good game but actions are not in line with what they're saying.
Business As Usual	Haven't change at all. It's "business as usual."
Not Applicable	Steps isn't relevant or the work hasn't started yet.

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## Step 1: Get to know your donors – and the kind of community they want.

It's too easy to slip into the trap of just looking at people as potential sources of funding, then trying to immediately find that "hook." Try an alternative approach – simply seeking to understand the kind of community they want and the challenges in getting there.

WHY IT'S IMPORTANT	HOW ARE WE DOING ON THIS?	TOOLS AND TIPS TO HELP YOU
<p>People want to be engaged as more than just customers and people to be served. They want to be part of something larger than themselves. And they want to see the reality of their lives reflected in your work. Uncovering people's shared aspirations for their community helps them see that they can be part of something larger and helps you know what matters to them.</p>	<ul style="list-style-type: none"><li><input type="checkbox"/> We've Got This</li><li><input type="checkbox"/> Real Progress</li><li><input type="checkbox"/> Starting to Improve</li><li><input type="checkbox"/> Lip Service</li><li><input type="checkbox"/> Business As Usual</li><li><input type="checkbox"/> Not Applicable</li></ul>	<ul style="list-style-type: none"><li>• Use the tools for hosting community conversations with current and potential donors.</li><li>• As an alternative, use the Ask or Aspirations tools if you have less time or want to do one-on-one discussions.</li><li>• Consider embedding these questions in social media and surveys that you use with your current and potential donors (do not rely solely on these methods).</li></ul>

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## Step 2: Let them help you make sense of what you're learning.

Potential donors can be a big part of helping you shape your work. And because they live in the community, they can be a good sounding board to help you determine how to use your public knowledge.

WHY IT'S IMPORTANT	HOW ARE WE DOING ON THIS?	TOOLS AND TIPS TO HELP YOU
<p>A lot of goodwill can be built by bringing people into the process of thinking about what you're learning. This doesn't have to become a cumbersome process. But it will send a signal that the voice of everyday people matters.</p>	<ul style="list-style-type: none"> <li><input type="checkbox"/> We've Got This</li> <li><input type="checkbox"/> Real Progress</li> <li><input type="checkbox"/> Starting to Improve</li> <li><input type="checkbox"/> Lip Service</li> <li><input type="checkbox"/> Business As Usual</li> <li><input type="checkbox"/> Not Applicable</li> </ul>	<ul style="list-style-type: none"> <li>• Create a summary of your public knowledge using the public knowledge summary tools in the Community Conversation Workbook.</li> <li>• Meet with donors to have a conversation on the implications of what you're learning. Don't let them become planning meetings, but hear what people have to say and use it to move your thinking along.</li> <li>• You can do this as often as quarterly. Keep it small and manageable. A good way to think about it is, "What kind of group could I pull together without it becoming an all-consuming process in and of itself?"</li> </ul>

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## Step 3: Share what you are learning from the community and how it is influencing your work.

It's easy to let business get in the way of communicating regularly, yet communications is so critical to building trust, credibility and common ground for action—all of which lead to people wanting to support your work more.

WHY IT'S IMPORTANT	HOW ARE WE DOING ON THIS?	TOOLS AND TIPS TO HELP YOU
<p>People want to be heard. They also want to know that what they have to say matters. It's important to establish a regular pattern of letting people know what you are learning about the community and how it relates to your work. A good rule of thumb is to make sure you are communicating about these things at least once every two months.</p>	<ul style="list-style-type: none"> <li><input type="checkbox"/> We've Got This</li> <li><input type="checkbox"/> Real Progress</li> <li><input type="checkbox"/> Starting to Improve</li> <li><input type="checkbox"/> Lip Service</li> <li><input type="checkbox"/> Business As Usual</li> <li><input type="checkbox"/> Not Applicable</li> </ul>	<ul style="list-style-type: none"> <li>• Communicate key points from your public knowledge summary in your newsletter and/or your website.</li> <li>• Make sure in your updates that you share how the learning is influencing your work – either reinforcing that you're on the right track or causing you to change direction or make different choices.</li> <li>• Use social media to share "snippets" from your public knowledge and to ask people the simple question, "What do you make of this?"</li> </ul>

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## Step 4: Turn the pitch outward, too.

When it's time to do the ask, resist the urge to fall back into old habits. Instead, keep the focus outward on the community.

WHY IT'S IMPORTANT	HOW ARE WE DOING ON THIS?	TOOLS AND TIPS TO HELP YOU
<p>It's counterintuitive, but shifting the pitch from, "Here's what we do for you (or the community)," to "What we can do together to build the kind of community we all want," can make a powerful difference. Tie your pitch directly to people's shared aspirations.</p>	<ul style="list-style-type: none"><li><input type="checkbox"/> We've Got This</li><li><input type="checkbox"/> Real Progress</li><li><input type="checkbox"/> Starting to Improve</li><li><input type="checkbox"/> Lip Service</li><li><input type="checkbox"/> Business As Usual</li><li><input type="checkbox"/> Not Applicable</li></ul>	<ul style="list-style-type: none"><li>• Consider setting fundraising goals based on what it will take to achieve goals or solve issues based on what you have learned through listening to the community.</li><li>• Use your public knowledge summaries to frame your pitches. Shift to a position of, "Here's what people are telling us they care about and what they want to see happen to get there. How can you be a part of that?"</li></ul>

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## Step 5: Stay Turned Outward and keep communicating.

Keep the lines of communication open even after the ask. But instead of defaulting to just providing information or “puffing up” your success, keep tying back your progress or course corrections or even setbacks to what you are learning from the community so the connection is clear to people.

WHY IT'S IMPORTANT	HOW ARE WE DOING ON THIS?	TOOLS AND TIPS TO HELP YOU
<p>People want to know that you aren't simply paying lip service to the aspirations and concerns of the community. Show them by keeping them up to date and making explicit how your efforts continue to stay grounded in what you are learning.</p>	<ul style="list-style-type: none"> <li><input type="checkbox"/> We've Got This</li> <li><input type="checkbox"/> Real Progress</li> <li><input type="checkbox"/> Starting to Improve</li> <li><input type="checkbox"/> Lip Service</li> <li><input type="checkbox"/> Business As Usual</li> <li><input type="checkbox"/> Not Applicable</li> </ul>	<ul style="list-style-type: none"> <li>• Tell real stories of how people are making a difference toward the kind of community people say they want. These “can—do” narratives give people a sense of possibility and hope. Make sure the tieback to what you know matters to people is very explicit.</li> <li>• Let donors be the voice of sharing updates and progress. They could write pieces for your newsletter, share learning through their social media networks, or do newspaper editorials.</li> <li>• Keep your public knowledge summary ever present in front of the communications team. Make sure they can answer the question, “How is the tieback to our public knowledge explicit in this communications piece?”</li> </ul>

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## DISCUSSION QUESTIONS

1. What do you make of your results? Do they surprise you? Why?
2. After reviewing your results, what current donor engagement strategies could you “tweak” in a way that’s more Turned Outward?
3. What’s one new step you could take to better Turn Outward and engage donors more fully in the next 1—2 months?
4. What’s a more long—term action you might take and implement over the next 6 months?