

## About the author ...

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Bob Miller is the owner of R. Miller Consulting, and the founder of TrustyPortal, a cloud-based fundraising and engagement platform. Bob is a seasoned development professional with over 25 years of management and fundraising experience. Bob served as the Vice President of Advancement at Loyola Academy, in Wilmette, IL, for over ten years and with his team raised over \$125M, including the successful completion of a \$78M capital campaign. Bob served as the Chief Advancement Officer for the American Junior Golf Association and was a founding Executive Board member of the Gwinnett County Public School Foundation, the nation's 10th largest school system at the time. Bob was selected as a member of the top 40 under 40, by the Atlanta Business Chronicle for his work in fundraising and development. He graduated from Texas Christian University with a B.S. and has served on many non-profit and foundation boards. Bob proudly served his country as a soldier in the Georgia Army National Guard, while raising four children with his wife Jennifer. Bob lives in Evanston, IL and founded R.O. Miller Consulting in 2017.

**Delivering Authentic Donor Engagement***By Bob Miller*

Most organizations crave authentic engagement with their constituents. Yet budget pressure, leadership demands, and ever-expanding visions and strategic plans often force staff to neglect the steps necessary to build and sustain relationships and a truly engaged community. Even the most capable supporters can feel disconnected; engagement challenges can affect a large swath of your school family. How do we have conversations that drive better connection? How do we ensure a cooperative give-and-take attitude that will lead to meaningful association?

*The following ideas may help you build better engagement, and expand your mission's impact:*

**Define It**

The first step is to define what you mean by "engagement." Is engagement every interaction that happens between your school and a constituent? Are interactions designed to enhance your philanthropic efforts considered engagement? Does engagement mean interacting with people within a specific age band?

Regardless of the answer, clarity around your engagement goals, and how you plan to measure success in the completion of these goals moving forward is essential. Focusing on non-major gift individuals is an excellent first step, especially if your institution needs to grow its base for long-term success.



**Make the Approach Personal**

Most supporters want what everyone wants – to be known, to belong, to feel like you are a part of a family, and a vital community member. Your strategy must create and intentionally highlight your school’s connection with a constituent. While a personal touch in every contact is nearly impossible, it should be the goal – especially for the critical first-time or small donors. Many organizations inadvertently accept these gifts in a transactional manner and miss the point entirely. Every donation, every person, can and should be an opportunity to draw others closer to the heart of your school.

*What, in particular, stands out about our school?*

Engagement is not about producing an enormous cache of collateral materials; it’s about sharing the philanthropic goals of your organization with donors, and developing an enduring relationship with them. The best outcome is one that encourages donors to get involved with helping those you serve.

The way to reach this goal is to converse with stakeholders, especially when they give a gift of time, talent, or treasure.

**Storytelling**

Storytelling is an important part of encouraging donor involvement. Become a better storyteller by meeting

your donors, and sharing the stories that make your organization one they want to join. This is also an opportunity to paint the bigger picture. Where does your school want to go? Connect the current impact of your organization with a vision for a bigger, bolder future. Sketching a concept through storytelling is a powerful way to keep donors and prospects interested. Continuing the story by providing updates on your mission and impact is a terrific approach to boosting engagement over time.

Train yourself and your team members to think in terms of “chapters” when telling a story – one where the ending or outcome is unknown or in question. Be brief, but compelling – emphasize how the students benefit, rather than how the school progresses. Use a multi-step approach; multimedia tools will help to get your stories out and, most importantly, will encourage people to share them. If you are lucky, maybe they will go viral.

Effective storytelling is essential and learnable. Plan, practice, and hone your skills with advancement arena staff, faculty, and other personnel. Solicit feedback long before you meet up with a prospective donor. It will be an educational experience for all involved.

**Listen and Learn**

When you talk to a constituent, ask, “What is important to you about this organization?” Constituents will give

you this crucial information, and you will learn a great deal – if you are receptive and listening.

*What do you value most about this institution?*

Many fundraisers look at this exchange through the lens of how to capitalize on a contributor’s interests in order to get a donation. It’s a short-sighted approach to development, and could easily bring the opposite, undesired effect. It’s best to have a series of questions to ask your donors to help you understand their motivation for involvement in your organization.

For example...

*What do you wish the school did better?*

*How did you first become involved?*

*What do you remember most fondly from your days here?*

*Why did you choose this school for your child?*

*What teacher had the greatest impact on you?*

When you’re done, ask for permission to follow up, so that patrons can respond with their thoughts on your proposals. Make sure to do your homework before you follow up; at the end of the day, the schools’ needs will always be eclipsed

**Catholic School Management Services**

Assessment	Advancement	Planning	Leadership
LIA – Limited Institutional Assessment	Fundraising	Strategic Plans	Board Development
Audits	Development	Goal Setting	Governance
Evaluation	Alumni	Mission, Vision, Values	Staff Coaching
Administrative Structure	Communications	Programs	Training
Staffing	Planned Giving	Departments	Search
Programs	Marketing	New Initiatives	Facilitation
Departments	Enrollment	Partnerships	Workshops
Satisfaction	Student Recruitment		Seminar Series
	Campaigns		Conference Presentations
	Feasibility Studies		

by the constituents' needs and desires. Find common goals in the information that donors have shared with you that can help get them involved in helping your students.

### First Time Donors

Outreach to new donors paves the way to the next gift, and to better understanding. When someone makes a gift for \$250, pick up the phone and call them to say thank you. Say, "I just wanted to thank you for your gift and I'd love to know a little bit about what prompted your donation." It's an opportunity to celebrate that the donor is investing in your mission, that they found it worthwhile enough to get involved. Solid follow-up with first-time givers sows seeds. It is very rare to get a million-dollar gift right out of the gate; people come along on a journey. When you acknowledge their first gift, they remember, and appreciate it; it encourages them to give again, down the line. This interaction also lifts the spirits of those making the calls.

### Record and Share

Relationships are essential to development goals. Remembering what people tell you is vital to building authentic interactions. Beyond the names, birthdays, and family members, you should do your best to understand the "why" of a donor's involvement. Why, at this exact moment, are they in your office, school, or event? That information should be recorded, and shared.

*I remember telling my staff,  
"All conversations must be  
recorded in our database, because  
the information doesn't belong  
to you; it belongs to the school."*

This necessary discipline is always worth the time.

These encounters help gauge the relative "distance" a constituent has to your organization, for example, whether or not they understand, and value, their impact. This data should be in your records, and quickly disseminated to inform and improve engagement.

### Transparency

Transparency is necessary to growing healthy affiliations and is critical when conversing about important topics. Donor letters, and giving statements with details, especially in a digital format, are essential to this process. Does an individual donor know and understand their personal giving information? How much have they given you, and when was the last gift? What have they supported in the past? How much information is available for them to peruse, remember, write down, or double-check?

The idea of this level of data-sharing can feel awkward, or seem overly revealing, but donors appreciate the information. People better understand the significance of their contributions if they know the impact of their gifts. Consider giving supporters their own private password-protected space. Increased access to their personal information – and a sense of being in a more exclusive place – acknowledges the value of the relationship.

### Materials

Evaluate your printed materials and your social media engagement, to ensure that they support donor interaction. This allows you to respond to a donor's need for various levels of knowledge. When you talk to a new constituent, think in terms of general knowledge, using materials with a long shelf-life and a broad scope, as versus the approach to a long-term benefactor, who wants to explore a specific area. Being able to personalize the information you provide ensures the individual will get messages that respond to his/her needs. This responsiveness is valuable in obtaining and sustaining engagement with donors.

### Online Communication

Online communication should complement the printed materials, and provide even more detail for the stakeholder who wants or needs it. Only some people who visit your website want a homogenized experience, especially if they have long-standing relationships with your school. You should do your best to accommodate all levels of involvement in your organization.

One effective way to accomplish this is to think in terms of a story. What story about your school will reflect your constituents' interests, hold their attention, and inspire them to act? Does the story involve the vision, challenges, or history of the organization?



Second, try sub-navigation where constituents self-identify (new parent, donor, alum, etc.) using a “bridge page,” and collate the information you think will apply to these sub-sets.

Lastly, understand the communications life cycle, where someone may visit a website, read a brochure, visit a campus, and re-visit the website before they finally pick up the phone. You should meet your constituents where they are. Two-way “conversations” have always been a strength of the online community, and most donors heartily welcome the opportunity to exchange ideas.

### Feedback

Feedback is vital to authentic conversation. It’s one of the primary means of keeping supporters engaged.

Evaluate how your communication approaches (links, QR codes, texts, email surveys, etc.) allow constituents to provide feedback. Feedback received well will drive better engagement; good feedback protocols will allow you to learn, respond to, and anticipate your donors’ needs, and to personalize your messaging, which is especially important during a PR incident or crisis.

*Responses to feedback (or inquiry) need to be timely and relevant – set clear expectations in this regard for your team, so that donors will not feel ignored.*

### Technology to Reduce Friction

Technology can help in some ways, but it’s generally incapable of genuine conversation or authentic bonds.

Text messaging or app notifications are powerful ways to share information like pictures, attendance, or gift acknowledgments, which may drive relationships, but they are rarely a solution by themselves.

Robust discernment should be had around the use of technology; the purpose of technology should be to reduce friction and enhance engagement.

### The Ask as a Conversation

A successful engagement approach can undoubtedly promote giving. Whether your conversation concerns impact, need, or stewardship, remember that the cooperative approach got you to this point.

I encourage you to take an authentic approach to sharing information about your programs by emphasizing their influence and importance.

*Partnering with a donor who then allows you to highlight their involvement in your mission sends an effective message to peer constituents, and demonstrates leadership and commitment to your school.*

Adopting this “ask” approach can empower you, the donor, and your organization.

Remember, the greatest cathedrals in the world were built because someone had a dream, and a donor was inspired to make it come true.



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