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Keeping Funders Close by Engaging them in Meaningful Relationships



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Non-profit vs. Social Profit



Lynn Twist acknowledges the work we do as that of a “social profit” that provides for the social welfare of our community.

For those who engage in “social profits” we are social “prophets”.



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Being a “social prophet” means we are each a part of the “Healing Profession”

- Healing TRAUMA
- Healing DISEASE
- Healing the ENVIRONMENT

Today: *Let’s consider how we may engage hard working men & women who are also seeking “meaning” in their lives.*



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Step into your power as a “social prophet”



Leadership = Vision + Implementation

- Be a Leader; Speak/Be a part of the Vision & putting it into action

Risk Taking – Success requires stretching & risk taking – knowing mistakes are inevitable

You are the Story teller for your client & donor

We are all moved by stories and want to know our role within them. What’s behind the power of a story.... Through it, is our experience validated? Are we the savior?

What is the story that speaks to your social profit’s vision and its implementation?

→ Rethinking our “elevator speech”)

Development Professionals should all have Direct Service within the job description

→ Spend time working your mission directly with clients . **Directly engaging with your clients will inform the authentic stories and motivation to step in to your power and take risks on their behalf**

Mastering the Art of Storytelling



- **Tell Your Clients' Stories:**
(vision, implementation, \$, stats, and a call to action – not all at once)
- **Teach Your Clients to tell their Stories:**
 - What was life like before; details of the intervention and what is life like now
 - Have your clients write their stories (NPR's "This I Believe")

How engaging is the Tour of your Facility?

Direct Service: it teaches you when status quo wasn't enough and will provide the most authentic stories. *(Great New Years Resolution!)*

Hand written notes, sending work from the clients...photos, poems, art, report cards..etc, etc! *(New Years Resolution #2: how many can you send per week?)*



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Always consider Layering a Corporate Gift with Meaning



Companies wish to experience “meaningful relationships”

Financial Education as an example of bringing their expertise to social prophecy.

- Bringing their own contribution to heal
- Dollars vs. In-kind expertise
- Benefits of knowing they’ve made a difference
- Sharing in the mission makes for a true corporate partner

Seeing the company as also deserving of benefit

(individuals who feel they've made a difference, spreading to MANY individuals, i.e. morale, recognition in the community, their name linked to making a diff in the community)



- Bring visibility to your Thank You (Pamela Chavez)
 - ✦ Presenting to the managers meeting/team meeting after receiving a corp. gift
- Letter to their supervisor/stakeholders
- United Way's Employee Campaign (staff → board → community)
 - ✦ ("we're in it together!")
- Matching gift campaigns or informal matching opportunities
- Adding a volunteer opportunity that will bring employees to clients (ex: mock interviews, financial education)
- Broadening the pie! Collaborate, collaborate, collaborate!
- Press Release/Media to spread the story of lives changing!

- Seeing the company as individuals...with families, seeking meaning – all potential!



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Engaging the Donor's FAMILY



- “and most importantly, tell your children”
- Creating Ceremony (“Guardian Angels”)
- To whom do we address the letter? Are we ignoring the MOST important people in our donors’ lives?
- Speaking of letters....engage board members, staff, clients & vol. to write PERSONAL notes on Annual Letters!
- Inviting spouses & children in for visits, community service, especially with the clients *(mock interviews, holiday wish program)*
- Middle & HS students all need community service projects --
- Offer your social profit as a field trip to their kids’ school
- Have you presented with a donor at her/his Church, Rotary, Civitan Club?
- Family Lifecycle events are opportunities to engage their favorite social profit.
- To those who do not have “family”, are we prepared to fill the gap?
- Broadening the pie....Does your agency do Mutual Designated Asks with UWCNM?



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Funder's Forum



- Identify the Funders for whom you have a relationship and choose 3 to take steps toward a meaningful relationship.
Ex. If you received a scholarship today...send Jennifer a Thank you note.
- Do your homework on any who have had relationship with your social profit in the past, ask board members, key staff, clients & volunteers. *“just learned of a client who bought their first car at Don Chalmers FORD – 10 years later it’s still what gets them to work and back – the same job, the same car - thank you and I look forward to meeting you Pamela!”*
- Afterwards, send a note of something that was applied and made a difference.
- Other ideas:



In Closing...keeping ourselves real!

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- **Use of Self**

You are the Storyteller, the bridge to the classroom, the client's home, the tour guide, the interpreter and the one to ASK!

- **Authenticity**

Don't be perfect – be yourself. Further, the agency and your agency isn't perfect either – but they are authentic!

Engage with clients (offering your own authentic strengths)

- **Be a Leader - be a “social prophet”**

Be a part of building the Vision & it's Implementation.

- **Nurture yourself so you may remain fully PRESENT!**