



Sunflower Foundation

- *Dynamics of Donor Development*

Thank you for joining us!



Dynamics of Donor Development

- Creating a Culture of Philanthropy, **Recording available.**
- Crafting Your Case for Support, **Recording available.**
- Everything You Need to Know About Donor Advised Funds, **Recording available.**
- Discovery Conversations & Corporate Development, **Today!**
- Prospect Research for Small Shops, **Tuesday, April 28 at Noon**



Getting Started

Add your name, organization and where you're joining from in the chat.

If you'd like, also tell us a little bit about how comfortable you are with discovery conversations and corporate development.

We'll use the chat for questions throughout the presentation.



Donor Development Accelerator Grants – Now Open!

Purpose:

Accelerate knowledge into action!

Direct support of strategies and best practices learned through the Donor Development Series.

Anticipated Awards:

- Up to \$5,000 per organization

Timeline:

- Application period: March 24 – May 5

Funding Announcement:

- On or before June 30



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Discovery Conversations and Corporate Development

Vickie Mathews, CFRE, Senior Vice President

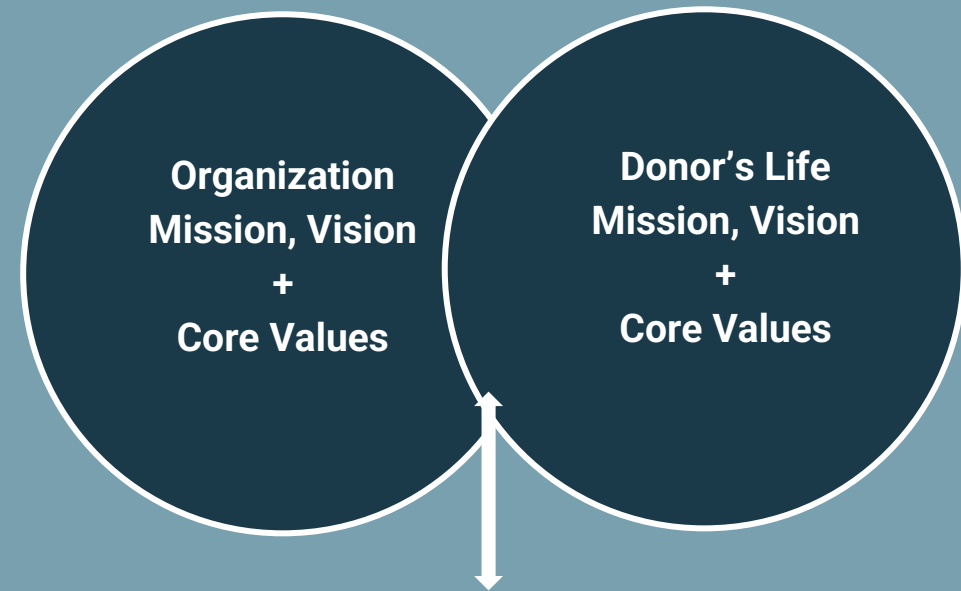
Brad Cecil &
ASSOCIATES



**NO ONE GETS WHERE
THEY'RE GOING ALONE**

Discovery: *What is it?*

Discovery explores where your donor's motivations align with your mission



Transformational Gifts
(not transactional)

Discovery: *What is it?*

- Intentional conversation to uncover what motivates your donor or prospective donor
- Introduces your organization or project
- Opportunity to build trust and your relationship with your donor
- Helps establish priorities and efficient use of time

If you've got a meeting, you've got a gift; it's just a matter of when and how much.

Discovery: Who and When?

- **Who?**
 - Existing major donors
 - New donors
 - Identified prospective donors
 - Community stakeholders
 - Potential or existing partners
 - *Next webinar: prospect research*
- **When?**
 - Before launching a major initiative
 - Exploring a new project
 - Informed by research or peer

Discovery: *The Invitation*

- Be clear about the purpose of the meeting when requesting it
- Acknowledge relationship history with the donor
- Highlight objective of the meeting
- Include impact and a measurable outcome for the program/project
- Availability
 - In Person/Tour
 - Virtual Meeting

Example

Dear Barbara:

Since we spoke last [REDACTED] successfully opened their new facility on Hwy 321 in Lenoir City. Perhaps you've seen it on your way to Maryville? **I can't thank you enough for supporting them already. Because of your previous support,** they moved in October of 2024, and so far the new facility and location have proved to be as impactful as they had hoped it would be. The clinic has increased its volume from an average of 6500 surgeries in previous years to 8002 in 2025, and they're hoping to be able to perform 10,000 surgeries annually before long. The improved layout and workflow allows them to take on more surgery volume in pursuit of that goal.

With that said, they are now in a position to implement some outreach programs to reduce the intake at local country shelters, (one of which is the Eastbourne Animal Center in Madisonville), and improve the lives of the cats that are living outside. The term "community cats" has been assigned to this segment, and is inclusive of the feral, stray and tame domestic cats that live in colonies across the tri-county area (Monroe, Loudon and Blount counties) that will be targeted. One of their generous donors has offered to match donations up to \$25,000 to support this program, and with \$50,000 in potential funding they can make a huge dent in this population.

So, I am hoping that you would be willing to ~~make a donation~~ **meet and have a conversation with Executive Director, [REDACTED], to learn more about this program, its goals, and get to know this organization at a deeper level. It is an incredible opportunity for [REDACTED] to have a donor, like the [REDACTED], willing to match gifts for twice the impact, which will be matched by the [REDACTED]. This opportunity is a special chance for [REDACTED] to increase its capacity, but I would really like for you and [REDACTED] to get to know one another. You immediately came to mind as a mission-aligned partner that may appreciate this strategy! If you have time for a virtual call, or better yet to stop by for a tour, I know [REDACTED] and the staff would welcome the chance to get to know you better and learn what inspires your generosity.**

~~The effect of any dollar amount will be doubled with the match. Once launched, they plan to generate some positive press for donors, so I hope you will see the benefit of throwing your support their way:~~

With gratitude,

Paula

Discovery Meeting Structure

- Identify roles ahead of time for participants
 - Subject-matter expert
 - Relationship holder
 - Volunteer/peer influencer
- **Welcome/Introductions**
- **Organization/Project Overview**
- **Discussion of Gift**
- **Summarize Action Items**
- **Closing**
- *Handout: Sample Discovery Questions*

Tips

- Play the conversation out in your mind as you prepare
- Put yourself in the donor's role and consider questions you would ask
- Be curious
- LISTEN carefully
- Observe verbal and nonverbal cues
- Use talking points as a guide, not a script
- Leave with a next step identified
- Bring materials as a leave-behind
- DO NOT bring a proposal unless specifically requested

Follow Up

How will you thoughtfully move the relationship forward?

- Handwritten thank you note
- Key insights to document in notes/CRM
- Stewardship:
 - Annual report
 - Volunteer opportunities
 - Events
 - Impact report
 - News stories or emails

if you ask,
people will



Example 1:

Individual Stretch Gift

Example 2:

Foundation *Managing*

Expectations

Example 3:

Donor Explaining Process

Example 4:

Major Corporate Gift

Key Takeaways

- **Example 1: Discover the donor's story**
- **Example 2: Value discovery, not assumptions**
- **Example 3: Listening and stewardship**
- **Example 4: Partnership over transaction**

SPIRIT AVENUE



Corporate Development

- Volunteer Engagement = Gateway to corporate giving
- Driven by HR and/or PR
- Contacts change often
- Giving priorities can change often
- Multiple sources for donations
- Long cultivation period
- Multiple decision makers/influencers

Corporate Giving Strategies

- Programmatic grants
- Event sponsorships
- In-kind donations
- Employee matching gifts
- Volunteer programs
- Corporate challenge grant
- Cause marketing campaign

Cause Marketing



Friends of Flight 93 National Memorial

475 followers

6d • 🌐

🍷 Raise a Pint to Support Flight 93! 🍷

Join us for Pints for Parks at Forbes Trail Brewing on April 26 at 2:00 PM ET as we celebrate National Park Week, National Volunteer Week, and Earth Day! 🌱🌍

🎵 Live Music by Bianca Melgar & Screamin' Blonde

🚚 Delicious Eats for sale from Jackie's Groovy Cheese Truck

🍺 Special Brew – "Giving Back IPA," with all proceeds benefiting [Friends of Flight 93 National Memorial](#)

A huge thank you to our sponsors: [Hollern Koontz Insurance](#), [Mid Penn Bank](#), [S&T Bank](#), and [Somerset Trust Company](#), in partnership with Forbes Trail Brewing.

Come out for great beer, good vibes, and a meaningful way to give back. Let's raise a pint in honor of Flight 93 National Memorial and the 40 heroes we will never forget!

🍷 #PintsForParks #SupportOurParks #NationalParkWeek #EarthDay #GivingBack



Corporate Engagement Tips

for Community Foundations

- Be prepared to educate on giving strategies
- Benefits of establishing a DAF:
 - In place of a corporate foundation
 - Immediate tax benefit
 - Establish separation from corporate decision making
 - Ideal for pure donations vs. event sponsorships
 - Can use to match employee giving, simplifies reporting ([Daffy for Work](#))
- Timing
 - Consider budget year
 - Set up DAF Q1-3 to prepare for Q4 donation
- Engagement strategies
 - Volunteer service days
 - Education days/lunch and learns
 - Be a resource
 - Stewardship

Thank you!

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ASSOCIATES

Dynamics of Donor Development: Up Next!

- Prospect Research for Small Shops, **Tuesday, April 28 at Noon**
- Donor Development Accelerator Grants due, **Tuesday, May 5 at 4p.m.**



Thank You!

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Kelli Mark, Director of Healthy Communities

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