


A Moves Management Love Story

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1



Why relationship management?

80% of nonprofits use gift amount as primary – and often, only – data point for planning donor communication and fundraising campaigns.

[*Abila Donor Engagement Study, 2015*](#)

2



What we'll cover:

- #1**
 - Learn elements of successful relationship building
- #2**
 - Identify opportunities for relationship building throughout donor/client cycle, especially stewardship
- #3**
 - Discuss healthy relationship building practices

3



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4

My legacy donor experience




The image shows a woman in a red top holding a certificate, standing next to a man in a light blue shirt and yellow tie. They are in front of a university seal. The Tablanthropy logo is in the bottom right corner.


5

What is relationship management?

Transactional
One-way communication
Specific action



Relational
Two-way communication
Series of actions




The image shows a diagram comparing Transactional and Relational communication. Transactional is one-way and specific, while Relational is two-way and a series of actions. The Tablanthropy logo is in the bottom right corner.

6

How to manage relationships

Donor Cycle	Management Model
<ul style="list-style-type: none"> ● Identification ● Cultivation ● Solicitation ● Stewardship 	<ul style="list-style-type: none"> ● Analyze ● Plan ● Implement ● Evaluate

[Encyclopedia of Public Relations](#)




7

Healthy relationship elements

- Communication
- Respect
- Acceptance
- Trust
- Shared Interests/Values

["The Five Most Important Components to a Healthy Relationship,"](#)
Norra Macready via Classroom



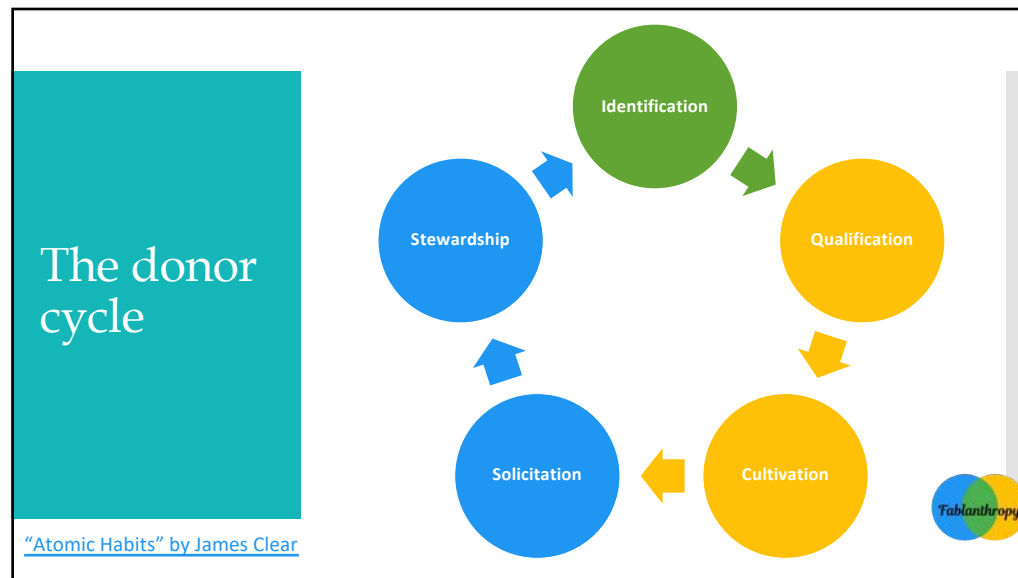
8

Personal Case Study

- Think of a donor/client where in working with them, you've faced challenges. Which area is the one you can work to improve connection?
 - Communication
 - Respect
 - Acceptance
 - Trust
 - Shared Interests/Values
- Share with a colleague your story and what you've chosen to do.
- Would they suggest something different?



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9





10

Identification
Be upfront



11

Uncovering their story:



Why?
What?
How?



12


Cultivation

Stay curious

Keep your word

[John Gottman's bid theory](#)



13

Learn their motivations

- Why are you engaged with our organization?
- What values are important to you?
To your family?
- If money were no object, what would you like to accomplish?
- What impact would you like to make with your philanthropy?
- How do you want to be remembered?

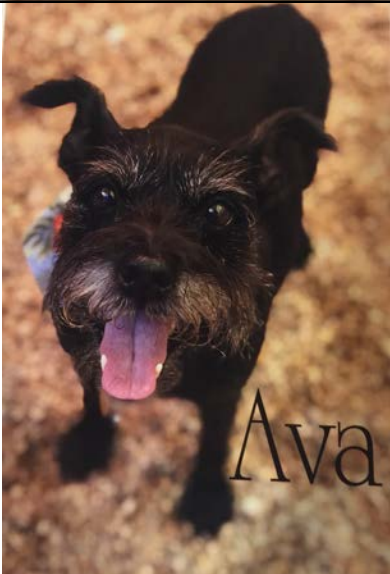


14


Solicitation

Ask, then
listen

["The importance of legacy giving to the donor relationship" by Jay Love](#)




Ava



15

What's your story?


- In pairs, tell a story about a gift you made. If you are the listener, focus on the journalistic elements:
 - Who?
 - What?
 - Where?
 - When?
 - Why?
 - How?
- After listening, paraphrase the highlights back to your colleague.
- Then switch!




16

Stewardship

Relationships
change over
time






17

Legacy Societies

- Offer cultivation, solicitation, stewardship strategies
- Consider how you can integrate with other organization activities (development organized or not)
- Pandemic and beyond considerations for stewardship activities



[Tour of Tulane's Mussafer Hall](#)

18

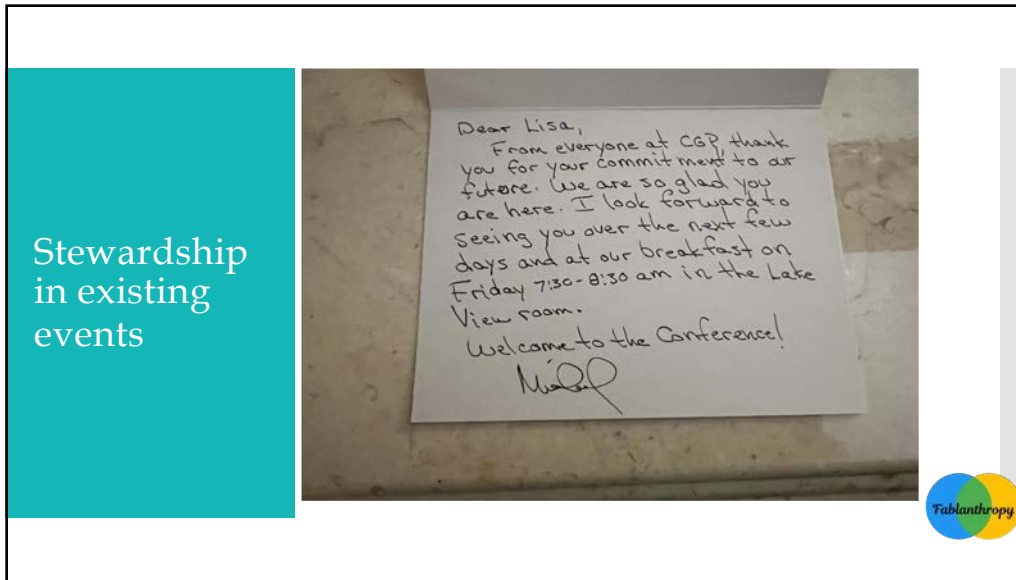


19




20

Stewardship
in existing
events



Dear Lisa,
From everyone at CGP thank
you for your commitment to our
future. We are so glad you
are here. I look forward to
seeing you over the next few
days and at our breakfast on
Friday 7:30-8:30 am in the Lake
View room.
Welcome to the Conference!
Mia




21

AFP ICON
2023:
Omega
Society



22

Stewardship
in existing
materials




*Both Academy women.
Both love their alma mater.*

Both committed to helping future St. Agnes students succeed.

Ann and Kristen may have graduated from St. Agnes Academy 50 years apart,
but they share a love for the school that is so great,
they are supporting St. Agnes through their legacy.

Learn more about these alumnae,
and how you can join them in
making a future gift at
www.st-agnes.org/1906Society
or contact Lisa Chmiola, Director of
Major Gifts and Planned Giving
at 713-219-5466 or
Lisa.Chmiola@st-agnes.org

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Veritas 1906 SOCIETY | 23

23



Recap:

#1

- Learned elements of successful relationship building

#2

- Identified opportunities for relationship building throughout donor/client cycle

#3


- Discussed healthy relationship building practices

24

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A large QR code is positioned on the right side of the teal box. In the center of the QR code is the Fablanthropy logo, which consists of three overlapping circles in blue, green, and yellow, with the word "Fablanthropy" written in a cursive font across them.