



Tax Talk Thursdays

Cultivating authentic relationship with funders

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Goals

- Understand the importance of communications with funders and donors outside of proposals and appeals
- Explore The Opportunity Agenda's V.P.S.A. structure as a tool for messaging
- Examine and compare different messaging examples



THINGS TO AVOID:

- Fundraising that is **crisis-driven** or **reactive**
- **Responsibility for fundraising is exclusive** to a few people (for example, a Development Director or Executive Director)
- Development activities are viewed as costs rather than investments, resulting in a **development effort that is often under-funded or inadequately staffed**
- Communication with donors is **limited to solicitations**



BEST PRACTICES

- **Don't** neglect funders and donors in between grant deadlines and appeals
- What can you do to make donors and funders feel Informed, Engaged, and Connected?
 - Keep them informed about the impact of their investment
 - Provide updates on other news about your organization
 - Remind them why their support matters and how their giving is advancing your shared values.



EXAMPLES

- Virtual Engagement:
 - Newsletters
 - "Insider" email updates
 - Webinars
 - Social media outreach
 - Phone calls

- In-Person Engagement:
 - Funder briefings
 - Policy conferences
 - Donor briefings
 - House parties
 - Luncheons and Receptions



MAKING THE ASK

Think about your organization. Why does it exist? Why do you want to do the work?

This is the story we need to tell.

When you know the "why", the ask comes eas(ier)

What does your organization need philanthropic support for?

What is the impact of a gift?

Tailor your language and messages; "speak their language"



Value

Leading with values is a proven strategy to resonate with audiences.

The Opportunity Agenda suggests highlighting "opportunity values" like:

- Equity
- Mobility
- Community
- Security

Problem

Clearly and succinctly define the problem in concrete terms and frame it as a threat to the previously mentioned values.

I.E. cutting property taxes for the wealthy is a direct threat to equality and community.

Solution

Emphasize a clear solution to the previously stated problem.

By making the solution clear, this prevents hopelessness and "compassion fatigue," and provides a positive outlook for audiences.

Connect the dots to your policy solutions.

Action

Give your audience a call to action that will help make your proposed solution a reality.

Make this concrete:
Donate, phone banking, sending an email, peer recruitment, signing a petition...



PUTTING IT ALL TOGETHER

Value: *"Our economy thrives when filing taxes is free and fair for hardworking families."*

Problem: *"But our current tax system is complicated, and corporate tax filing services and software create financial barriers for families."*

Solution: *"Our organization provides free tax help for families in our community. Our volunteers prepare taxes free of charge for eligible folks, uncomplicating the tax filing process and uplifting those who would be left behind by our current tax system."*

Action: *"With your support, we can expand our free tax filing services to 500 more families in the area and continue building an equitable future for our state. Will you make a contribution today?"*



**Any
Questions?**

