



Relationship Fundraising

Where do we go from here?

VOLUME 4

Summary Report

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PURSUANT 

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ROGARE
THE FUNDRAISING THINK TANK

Relationship Fundraising: where do we go from here?

Volume 1 – review of theory from relationship marketing

Volume 2 – review of theory from social psychology

Volume 3 – trends and challenges identified by practitioners

Volume 4 – summary report

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Foreword

Jay Love, founder and ceo, Bloomerang

Bloomerang is extremely proud to be the co-sponsor of Rogare's first relationship fundraising project. Being able to fund breakthrough research, which impacts the core concepts of fundraising, is a golden opportunity we embraced to the fullest.

A key reason for our pride is the fact that Bloomerang's mission is to improve donor retention in the nonprofit world, which is why we built our product based on best practices from leading fundraising experts.

Donor retention is all about building relationships. With his breakthrough book *Relationship Fundraising*, Ken Burnett put a spotlight on why donor retention is vital to fundraising success and how to impact retention rates going forward. He paved the way by articulating the methods on how to build long-term relationships.

There could not be a more perfect primer to revisit in order to provide modern and solid advice to fundraisers all over the world on improving donor retention.

All of us at Bloomerang cannot wait to see if Ken's methods have truly stood the test of time, or if new relationship-building concepts emerge. Either outcome could be game changing for the nonprofit world, and the four volumes of this review provide the foundation for planning relationship fundraising's next stage of development.

Ross Miller, chief operations office, Pursuant

The fundamentals of human relationships have not changed much since Ken Burnett coined the idea of Relationship Fundraising in 1992, but in the subsequent two decades technology has made an unprecedented impact on how those relationships are first formed. When the opportunity arose to re-examine the principles of relationship fundraising with fresh perspective, Pursuant could not have been more excited to co-sponsor Rogare's discoveries. As a company dedicated to innovation in the nonprofit space, what better way to shore up that commitment than for Pursuant to support such groundbreaking work?

Fundraising principles are still fundamentally about people connecting with people. However, the relational dimension of our work continues to become more complex as our respective bases of support grow.

The challenges facing fundraisers today require us to think differently in our approach to a practice that is both an art and a science. How we find, begin, manage, and grow those relationships can seem like an impossible task at times. Compiling the collective expertise of senior practitioners in relationship management and social psychology, this study seeks to join what we've always known about the nature of human relationships with fresh insights from the science of how we make decisions.

We must continue to discover and implement the very best disciplines if we hope to improve as effective fundraisers today, and in the future. We at Pursuant are confident that the results of this study offer tangible and actionable observations about how these principles have evolved. 🍎

1

Introduction

It's impossible to understate how important the concept of 'relationship fundraising' is to many fundraisers. Since the term was first introduced to the fundraising lexicon by Ken Burnett in 1992, a huge number of fundraisers have adopted relationship fundraising, and its 'donorcentrist' principles, as the guiding philosophy for their professional activities. The idea has spread throughout the fundraising community to become, at least in the English-speaking world, one of the dominant modes of thought about fundraising. One might almost call it an ideology.

Yet there is, remarkably, little agreement among practitioners about what relationship fundraising actually is, and what a relationship approach might practically mean for the way in which we steward our relationships with donors. Fundraisers certainly have a general sense of what it might mean as a guiding philosophy, but little idea of the theories, tools, and frameworks that could be guiding their approach, nor the results that might be achieved if they did so. Certainly, there has been little academic research or theorizing that puts flesh on the bones of the basic relationship fundraising idea, or has explored entirely new directions for relationship fundraising.

This Rogare project - conducted with the support of Bloomerang and Pursuant, for which we are enormously grateful - aims to provide that theoretical foundation. This is because it is important not just to know that doing some particular thing, such as the questions used in a donor survey, works in some particular situation or with some particular segment of donors. It is also important - arguably more important - to understand why it works, and why and how it might work again in different scenarios and circumstances. It is that knowledge that this project seeks to provide.

However, much of the theory has yet to be applied to fundraising practice and this year-long project (it kicked off in January 2015 and is publishing in January 2016) is the first step in a long journey: it is

our estimate that it will take around 50 years to fully embed these theories into professional practice.

The project had six stages:

1. Canvass the views of senior practitioners on the project advisory panel (see Appendix) on the definition, scope and current success of relationship fundraising techniques.
2. Collate evidence of what is currently considered best practice and collect case studies of success.
3. Conduct a review of the domain of 'relationship management' in psychology and social psychology to identify theories, frameworks and ideas that might be used to inform fundraising practice.
4. Conduct a review of the academic and practitioner literature to identify theories, frameworks and ideas from the domain of relationship marketing that might be applied to fundraising.
5. Based on the two literature reviews, assess the views of senior practitioners on the project's advisory panel about the direction that relationship fundraising will take in the future and the challenges it must overcome.
6. Compile a final report that summarizes the learning from steps one to five and outlines the future direction that relationship fundraising might take.

There are four outputs to the entire project - which we have entitled 'Relationship Fundraising: Where Do We Go From Here' - each labelled as a 'volume' of the research (numbered according to the order in which they were completed).

Volume 1 contains the literature review of theory and ideas from relationship marketing (phase 4 above).

Volume 2 contains the literature review of theory and ideas from social psychology (phase 3), along with case studies of where some of this theory has already been applied to fundraising practice (phase 2).

Volume 3 contains the results of the qualitative research into what relationship fundraising practitioners consider to be the strengths and weakness of, and future challenges for, relationship fundraising (phase 1).

Volume 4 - this volume - is the summary report (phase 6) for the entire project. It brings together the key points from the previous phases (incorporates suggestions from phase 5), makes recommendations, and suggests future directions for relationship fundraising.

The three volumes are linked in this way:

Volume 3 identifies the challenges, strengths and weaknesses practitioners identify for relationship fundraising.

Volume 1 explores to what extent, if at all, relationship marketing ideas can be applied to fundraising and whether these ideas can address the challenges and weaknesses identified by practitioners?

Assuming that relationship marketing ideas are applicable to fundraising, Volume 2 explores how current theories of relationship building and maintenance from the domain of social psychology could be effective.

About the summary report

This report summarizes the main findings and recommendations of the whole project (which is, of course, the whole point of a summary report), coalescing and intermeshing ideas from all the previous phases of the project and the other three volumes.

However, it does not replace those three volumes (not everything is summarized in Volume 4) and we strongly recommend that fundraisers read and digest all three instalments to glean a full picture of the theory underpinning our recommendations, which this summary necessarily skims.

As this is the summary, we have not duplicated full references and citations, which can be found in the preceding volumes. Instead, we have referenced the volume and page number where you can find a full explication of anything summarized in this report. For example, something to be found on page 13 of volume 2 appears referenced in the summary report as (2:13). We strongly recommend you follow the references. ❶

2

What do fundraisers think about relationship fundraising?

Four key themes emerged from the qualitative study of practitioner attitudes:

Different American and British 'schools'

There appears to be a difference in how relationship fundraising is viewed in the USA and UK, with both schools that refer to themselves as 'relationship fundraising' having developed independently.

Responses suggested that American relationship fundraising applies mainly to major gift fundraising and focuses most strongly on the relationship, sometimes to the point of discounting the donation, at least when it comes to defining the concept. British relationship fundraising applies equally to direct marketing fundraising and major gift (and corporate, legacy and trust fundraising) and is strongly focused on maximizing sustainable long-term income, to the point of eschewing relationship fundraising principles if they do not achieve this end (3:7-11).

Donorcentrism

This research highlighted many ideas about what entails 'donorcentrism' in fundraising. These include:

- Understand donors (3:12)
- Connect donors to a cause (3:12-13)
- Focus on the cause, not the organisation (3:13)
- Build a 'deeper' relationship with donors (3:13-14)
- Developing genuine two-way communications (3:14-15).

The last bullet point points to a future development of relationship fundraising in co-opting some ideas from academic public relations theory, which looks at how organizations manage their organization-public relationships (OPRs) by developing genuine two-way symmetric communications with stakeholders, or 'co-creating' meaning with their stakeholders (3:15-16).

Failed intra-organizational relationships and the need for an organizational 'culture of philanthropy'

Many survey respondents highlighted their problematic relationships with senior colleagues at nonprofits, often manifested as a short-term approach that demanded immediate returns on investment. This short-termist culture among the senior management team and board made it difficult to secure the long-term support needed to make relationship fundraising work. The proposed solution is to establish a 'culture of philanthropy' at organisations (3:17-18).

Evidence, measurement, data and technology

Respondents called for more robust and consistent benchmarks and metrics by which to measure the success of relationship fundraising, focusing on factors such as retention and donor satisfaction rather than simple short-term monetary targets (3:22-25). ●

3

Can relationship marketing be applied to fundraising?

Relationship marketing is a process that attempts to put a longer-term focus on customer needs, which are viewed as pre-eminent, through a flow of two-way information (1:5). One conception of relationship marketing identified three principle orientations (1:5-6):

Tactical - where relationship marketing is defined in terms of techniques. These might include sales promotion activity and loyalty schemes designed to stimulate purchase and re-purchase.

Strategic - where the purpose is to design marketing that will create deeper bonds between the producer and the customer. The desire to form a relationship now drives how the organization identifies potential customers, gets to know them, keeps in touch with them, tries to ensure that they get what they want from the organization and checks that they do indeed acquire this benefit.

Philosophical - where the organization shifts its whole perspective on how to approach its markets, based on the primacy of the customer and the quality of the relationship that can be developed between them and the organization. Rather than derive value from products and services, value is derived directly from the existence and nature of the relationship itself.

Relationship marketing as a concept was first developed with the intention of applying it to business-to-business (B2B) relationships - where buyers and sellers of services needed to build trust between each other - rather than business-consumer relationships (BCR) (1:78, 1:22). However, there is little evidence that relationship marketing principles work in a B2B relationship setting (1:22-23) (relationship marketing was originally considered inappropriate to a consumer setting [1:13]), that commercial organisations are adopting

relationship marketing principles in their BCRs (1:12), or that BCRs even exist (1:12). It's also relevant to understand that relationship fundraising is not a direct analogue of consumer relationship marketing and was not conceived as an attempt to apply established relationship marketing theories and practices to fundraising (1:22, 3:10).

There are occasions where transactional marketing is perfectly appropriate in a consumer setting and what is required is good, basic marketing employing high standards of customer care.

But that is not to say that there are not times when a relational approach would not work in a consumer setting. Summarising the relationship marketing literature it seems that markets that could be "relationship friendly" would include situations where (1:13):

1. The organization provides important, variable or complex services or products.
2. Involvement in the product category is high and there is uncertainty associated with the purchase.
3. Products are luxury items such as clothes, perfume, cosmetics and fine wine; and purchases are expressive because of their closeness to the consumer.
4. Organizations can enhance social bonds by offering customers a sense of identification with the firm.
5. There is a need for regular maintenance or repair and thus regular contact with a supplier.
6. Customer lifetime value is substantial and where the products/services are high involvement - as in financial services.

7. The product can be significantly differentiated or customized.

Points 2, 4 and 7 might offer the greatest potential for fundraising. These are all scenarios in which there would be high levels of 'involvement' between the donor and the charity, so it may be that relationship marketing is better suited to a particular class of donors who are more engaged with the cause (1:13-14), where both parties desire a relationship, such as major donors or corporates (1:22). This would accord with the thinking of the American 'school' of relationship fundraising (3:7-11).

In other donor markets, notably the markets for cash and monthly giving, there is little evidence that the criteria for high involvement would be met. These contexts have little in common with those where

the development of relationships would be either desirable or achievable. Donors certainly require a fundamentally decent standard of care from the charities they support (1:22-23), but perhaps little more, and a more transactional approach (1:14) consisting of 'good old-fashioned consumer-focused marketing' might be perfectly appropriate (1:22). Even though the American school was very critical of 'transactional' approaches to soliciting donations (3:8, 3:9), employing a relationship analogy to deliver a base standard of care seems unnecessary (1:22-23).

But let's return to the idea that relational techniques have something to offer high involvement situations, and whether there are elements of relationships (if not necessarily 'relationship marketing') that can inform fundraising. ●

4

What can relationship fundraising learn from social psychology?

Models of relationships identify three core components: trust, commitment and satisfaction. Fundraisers in the project's advisory group were very clear on the importance of these three components, especially satisfaction (3:22), even if they were concerned that there were not the specialist databases and technology available with which to measure it (3:24).

Trust - the belief that the needs of one party to a relationship will be fulfilled in the future by the other party - lies at the heart of relationships and is integral to customer retention (1:16). Research shows that trust is a driver of donor loyalty and is enhanced by a number of factors, including communicating impacts on the beneficiary group, honouring promises made to donors and ensuring that donor-facing staff are trained in customer service procedures (see full list at 1:161).

Good, two-way communication is essential to fostering trust (1:16): Two-way comms were identified by the fundraisers in the project's advisory group as necessary to develop meaningful, mutually-rewarding relationships based on shared beliefs (3:14-16). Building trust also requires 'disclosure' of purpose, meaning and mistakes on the part of the organisation.

Disclosing information is a way to build 'intimacy' in relationships, in which both the organization and supporter might choose to share what they feel (affective) or what they think (cognitive) about various aspects of the relationship (2:19), fostering trust and leading to greater commitment, through an increased sense of identity with the focal organization (a good example of this is the Friends of the Earth Case study 2:19).

One way to achieve this would be to adopt current ideas in academic public relations theory (outwith

the scope of this current review) by encouraging and facilitating donors to 'co-create' meaning with nonprofits (3:16).

Understanding how donors regulate their privacy, balancing this with the need to connect, which may fluctuate over time, is also an important factor in building trust (2:8-9; see also 1:15).

Satisfaction - the positive affect associated with a relationship of the relative positivity of outcomes obtained in interactions with a partner (2:12) - is the single biggest driver of donor loyalty: donors who are 'very satisfied' with the quality of service they receive are twice as likely to make a second gift as those who are merely 'satisfied' (1:18).

Yet few nonprofits actually measure and track levels of donor satisfaction over time. That said, a number of major charities are now measuring and tracking donor satisfaction, with a handful constructing supporter satisfaction indices that can be fed into their organizational reporting systems (e.g. a balanced scorecard). Managers are thus now being rewarded for changes in the level of aggregate satisfaction expressed. Given the foregoing analysis, this would seem a long overdue practice (1:18). Fundraisers themselves are aware of the need to measure donor satisfaction and are calling for better ways of measuring and recording such metrics (3:23-24).

However, the nature of satisfaction changes over the course of a relationship and fundraisers need to be able to adapt their relationships to reflect that. At the start of a relationship, theory suggests that donors will be attracted to supporting a cause because of what the charity does and what it does for its beneficiaries. At this point, donor satisfaction comes from creating the best first giving experience possible (2:168) and, if possible, striving to create

a sense of 'longing' for the next interaction with the charity (2:12, 2:16), an expectation that ought to be instilled in donors before they receive a thank you for their first gift (2:12), and which will lead them to seek future interactions (2:15).

Once you have created the absolute best first giving experience and left your donors longing for more, social psychology research predicts that they will begin to transition their focus of attention in deriving satisfaction in the relationship from 'how attractive you are' to 'what needs this relationship can meet for them' (2:16).

It then becomes about not what charities do for their beneficiaries but what charities do for their donors. And this depends on what 'connection' fundraising built for the donors from the first gift. So fundraisers need to choose their relationship target carefully, beginning with the first contact, as this will set the parameters for how the relationship develops: if it is the relationship that a fundraising event built for the donor with other donors, then that is the relationship that needs to be strengthened and that is the relationship that donors will expect to fulfil their needs.

In simple terms:

- Acquisition requires a focus on the beneficiary and donors need to be 'aroused' to feel something about the cause (2:12, 2:27).
- Retention requires a focus on the donor, building on the context of the initial contact.

Satisfaction is a big predictor of commitment to a relationship, which we come to next.

Commitment – the intention to persist in a relationship (2:14) – is closely linked to loyalty (1:16) and in a nonprofit context has two dimensions: active commitment and passive commitment.

Active commitment drives loyalty (and through that donations and lifetime value) more than passive commitment and is itself impacted by shared beliefs and multiple engagements with the charity and the opportunity for learning by the supporter (1:16-17). This again highlights the need to co-create through genuine 'symmetrical' two-way communications (3:15-16) and all that this might entail for the future development of donor/supporter journeys (1:17).

Research in social psychology shows that commitment can be affected by persuading people to consider how much they have already invested in a relationship and how much they plan to invest in that relationship in the future (2:15-15). There's a difference between 'tangible' investments (in the case of charities, hard cash), and intangible investments (such as the 'warm glow' they get from supporting a cause, as well as any 'self-disclosures' – see above in section about Trust). How much people plan to invest in a relationship is a bigger predictor of commitment than how much they already have done. This suggests that looking at how much donors have already given – through methods such as a Recency Frequency Value (RFV) analysis – is not a good predictor of how committed they are.

If fundraisers can encourage donors to reflect on how much they would like to contribute to the charity in the future (planned future investment) and how much making a potential impact with their gifts mean to them (emotional investment), then they have the potential to increase their donors' commitment beyond the level determined by donors' past satisfaction, past investment and available alternatives. This has clear implications for the content of the communications of donor journeys, and may be particularly appropriate to products such as child sponsorship schemes, where the impact of future investment can clearly be seen. ●

5

Meeting donors' needs

Once a donor-charity relationship progresses out of its initial attraction/arousal stage, the emphasis shifts from what the donor can do for the charity/cause/beneficiary to how the relationship can help fulfil the donor's needs, such as a need to belong and be connected with other people, and for growth, self-actualization and self-fulfilment (2:17). It will not be easy to know how and when these needs are being met through a donor-charity relationship, but there are some relevant theories that can provide pointers.

Fundraisers can simply ask their donors through carefully constructed surveys that seek affective or cognitive self-disclosure (we have already explored disclosure as a way to improve trust in the donor-charity relationship). But disclosure also fosters greater intimacy in the relationship, which leads to a sense of identity and 'we-ness' with the charity or cause and higher levels of commitment (2:18).

Exploring the implications of **Identity Theory** will be hugely important to the future direction of relationship fundraising'. Key here may be the 'need to belong', by instilling in people the sense that they are a 'Greenpeace supporter' or an 'ActionAider' or a 'child sponsor'. For those charities that can, making a donor feel like a part of a unique or distinctive group would seem a highly appropriate strategy to adopt. Fostering a sense of group identity, however artificial that might initially appear to be, could bolster longevity in relationships (find out more about identity theory at 2:23-25; 2:27; 1:20-21).

In seeking to build loyalty, charities should reflect on how the donor can be encouraged to see **similarities** between themselves and the focal other (beneficiary, organization, another donor, etc). Merely exposing donors to the values of the organization is not enough. They need to be encouraged to participate in activities that allow them to experience the similar beliefs and values being applied; words alone may be insufficient (2:21-22; 2:28). For example, while acquisition events (initiating relationships) aim to create the

right arousal level to increase initial attraction, development events should create opportunities necessary to deepen perceived similarity, build deeper intimacy and increase how satisfied supporters are in experiencing a fulfilled life (2:22).

Self-Enhancement Theory also suggests that similarity, while powerful, is not enough. Rather than merely reflecting who a donor is in our communications, we should be reflecting equally on whom that donor could be, stretching their sense of who they might need to be to live a fulfilled life.

The whole focus of relationship fundraising could – note we are saying could, not should – shift to a more ideological focus on the donor in that the intention of relationship fundraising would be, according to **Self-Determination Theory**, to help the donor live a more fulfilled life in which a persons become highly competent of acting in one's love of others, and to feel that they are good at doing that (2:7).

Finally, bringing to a head all these ideas, relationship fundraising could set itself the ultimate goal of attempting to move donor-charity relationships from 'exchange' relationships to 'communal' relationships (2:25-26). Exchange relationships – following **Social Exchange Theory** – are conceived of as a series of connections, interactions and exchanges between parties, that create a sense of obligation to reciprocate and reward the partners for doing so (2:13). But partners to a communal relationship don't keep track of costs and benefits in this way. In a communal relationship, one partner begins to care about the others' needs and wants as if they were his/her own. To reach this stage, donors will need to have developed a shared identity with the charity they support, perhaps even a 'fused' identity (see 2:23-25). We hypothesize that if donors do feel that way about others in their giving relationship, taking care of beneficiaries' or organizations' needs feels akin to taking care of the needs of family and the pleasure is thereby heightened. ●

6

Future directions for relationship fundraising

Our purpose in conducting this project was to review and 'refashion' relationship fundraising, exploring how fundraisers might use current ideas and theories from relationship marketing and social psychology (and as it turned out, a small amount of public relations) not just to improve their current practice but to see if relationship fundraising could or needs to be taken in entirely new directions. These are our suggestions, recommendations and questions.

Relational v transactional/relationship marketing v customer service

There is a question for fundraisers about how far they can usefully apply the relationship analogy in their customer care. Would abandoning the notion of 'relationship fundraising' in individuals fundraising (reserving it for major gifts, corporate, trusts etc) serve a purpose by focusing fundraisers on the need for superior donor service through good marketing techniques?

As the profession gets to grips with reviewing and developing relationship fundraising, an acceptance that the relationship marketing approach has little to offer mass direct fundraising might allow fundraisers to refocus on high standards of customer (donor) care unencumbered by the notion that low-value donors require any kind of 'relationship' with the charities they support or an 'ideological' imperative that non-relational, transactional fundraising is somehow 'wrong'.

Rather than blindly seek to apply relationship fundraising to every individual donor, fundraisers should critically evaluate each fundraising situation to determine whether a relationship is the best approach.

Donor and/or beneficiary

Our review of theory from social psychology shows that focusing on donor needs once the relationship has passed out of the initial acquisition stage of attraction and arousal is imperative as it will lead to higher levels of satisfaction and commitment and ultimately more money to provide services for beneficiaries. However, for some tranches of donors, a transactional approach may be more appropriate.

As a sector we seem to have imposed relationships on our donors without giving the first thought to whether they might want one or the benefits it might deliver. Such benefits might be economic, but they are considerably more likely to be social or psychosocial in nature and reflect, or add value to, various aspects of an individual's sense of self. To practice relationship fundraising, fundraisers need to understand these dynamics.

Viewed from this perspective, engaging in relationship fundraising can be seen as a choice, depending on whom the organization regards as the ultimate beneficiary of its marketing activity. Is it solely the user of charities' services or are we genuinely interested in the outcomes for our donors as well? We do not, incidentally, seek to imply that either approach is necessarily better, merely that both approaches can offer value and that organizations need to decide whether a relationship or a transactional approach would be better suited to their circumstances or mission.

From a consequentialist perspective, focusing on donor needs is the right thing to do. Whether they ought to do this from a deontological perspective – i.e. do it because focusing on the donor is an appropriate end itself, rather than the means to bettering the lot of beneficiaries – is a choice charities need to make

Use academic theory to meet donor needs

If nonprofits choose the relational approach, whether that is from a consequentialist or deontological perspective, there is a wealth of theory from the domain of social psychology that would allow them to meet and fulfil the needs that donors have from their relationships with charities, which we have summarized above and explicate in far greater detail in Volume 2 (see especially the conclusions, 2:27-28).

We think that two of the most important of these for the future of relationship fundraising are creating a sense of identity for the donor with the charities they support, preferably a fused identity, and moving donor relationships from exchange to communal relationships.

We see it as absolutely essential that relationship fundraising must draw on the latest relevant theory to continually refresh and reinvigorate the ways it can deliver the best possible experience for the donor. This has been lacking over the past 20 or so years but is imperative to ensuring relationship fundraising does not stagnate in the future and become little more than a fundraising ideology.

Focus on commitment, trust and satisfaction

Whether focusing on a relational approach or a high standard of customer care in a transactional approach, it is important to focus on how the donor feels about their engagements, and whether they trust you, are satisfied with the service you provide, and are committed to the cause, organisation or relationship (or all three). Transactional donors can still be committed, satisfied, and trust you to do what you say you will do.

We strongly recommend that nonprofits start rewarding their fundraisers by how they make their donors feel. If you can focus on donor satisfaction, the money will surely follow. However, this means eschewing traditional metrics such as LTV, RFV, meeting income targets etc, and developing a whole new set of consistent metrics against which to measure and assess the set of relationship fundraising/customer care practices. Developing bespoke metrics is an imperative consideration, as is developing the software on which to run them.

A ‘culture of philanthropy’ and ‘total relationship fundraising’

The responses of the practitioner advisory group revealed very clearly and unambiguously that a main concern of fundraisers is that they don’t have the support, buy-in, or understanding of their colleagues and superiors: from trustees, chief executives and finance directors at the top; and from the likes of communications staff and campaigners at a peer level (3:17-18, 3:20-21). They are describing intra- organizational relationships that are problematic at best and failing or have actually failed at worst.

A proposed solution to this is the need to build a ‘culture of philanthropy’ throughout the organization (which echoes the view of relationship marketing as operating at a ‘philosophical level’ throughout an entire organization [1:6]).

Fundraisers are very clear in their understanding of donorcentric principles about the importance of understanding donor motivations, wants and needs, and developing, or ‘co-creating’, shared meaning with donors through symmetrical two-way communications (3:12-16).

However, for a discipline based on relationship building and maintenance, at no point in our project was there any serious suggestion that fundraisers ought to apply the same relationship building mechanisms they attempt with their donors to the relationships they have with their colleagues. Instead, the only focal relationship of relationship fundraising is ‘the donor’.

We therefore suggest that relationship fundraising adapt the concept of ‘total relationship marketing’ – which assumes that marketers need to not only build relationships with their customers, but with all the stakeholders (media, suppliers, regulators etc.) that enable their relationships with customers (3:20-21).

Using co-creational two-way engagement methods from current PR theory, a refashioned discipline of ‘total relationship fundraising’ would likewise attempt to foster, build and maintain all necessary relationships, including better relationships with fundraising agencies. The onus is on fundraisers to build these relationships to foster the culture of philanthropy, as it seems unlikely that the impetus will come from elsewhere.

Appendix – Advisory Group

United States

Nonprofit organizations

Brad de la Cruz, regional major gifts office,
Sutter Health

Ann Hale, chief development officer,
Anchorage Museum of Art and History

Bill Littlejohn, ceo, Sharp Healthcare

Consultants and suppliers

Tom Ahern

Claire Axelrad

Gary Cole, Pursuant (project sponsor)

Roger Craver

Simone Joyaux, Joyaux Associates

Jay Love, Bloomerang (project sponsor)

Kivi Leroux Miller, Consultant

Gail Perry Marc A Pitman

Kent Stroman, Stroman Associates

United Kingdom

Nonprofit organizations

Lucy Caldecott, director of fundraising,
CLIC Sargeant

Catherine Cottrell, deputy executive director,
Fundraising, UNICEF UK

Alex Hyde-Smith, Head of individual giving,
Marie Curie Cancer Care

Craig Linton, Amnesty International

George Overton, Director of fundraising and
communications, HCPAT – The Pilgrimage Trust

Sayyed Salam, philanthropy director, Save The
Children Fund

Paul Stein, MQ: The Mental Health Charity

Richard Turner, chief fundraiser, SolarAid

Consultants and suppliers

Ken Burnett, Revolutionise

Alan Clayton, Revolutionise

Alan Freeman, Freestyle Marketing

Scott Gray, Rapidata (Rogare Associate Member)

Susie Hills, Graham Pelton Consulting

Giles Pegram

Mark Philips, Bluefrog (Rogare Associate Member)

Beth Upton, Consultant

Dominic Will, HOME Fundraising
(Rogare Associate Member)

Other countries

Nonprofit organizations

Francesco Ambrogetti, Fundraising adviser, UN
Population Fund, Thailand

Maeve Byrne, president, Nanaimo & District Hospital
Foundation, Canada

Denisa Casement, Merchant's Quay, Ireland

Leif Wien Jensen, Fundraising manager, Norwegian
Association of the Blind and Partially Sighted,
Norway

Douglas Tanton, director of global resource
development and fundraising, CARE International,
Switzerland

Jane Vickers, VP development and alumni,
Warwick University, Bermuda

Roewen Wishart, foundation director,
Neuroscience Research Australia, Australia

Consultants and suppliers

Kimberley McKenzie, Canada

Anne Melanson, Bloom Nonprofit Consulting
Group, Canada

Pamela Simmons, Corniche Consulting, Canada

Sean Triner, MD, Pareto, Australia

In this project – supported by Bloomerang and Pursuant – Rogare reviews the theory that underpins relationship fundraising and identifies possible directions for its future development.

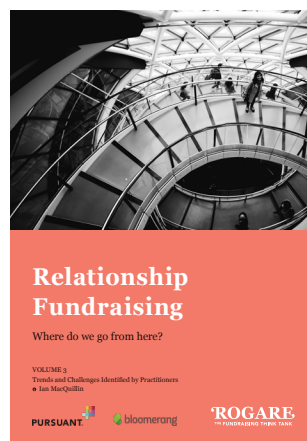
There are four volumes to this project:



Volume 1
Review of theory from
relationship marketing



Volume 2
Review of theory from
social psychology



Volume 3
Trends and
challenges identified
by practitioners



Volume 4
Summary report

Get in touch

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Rogare - The Fundraising Think Tank CIC is a community interest company registered in the UK, registration number 11807930.

Rogare brand identity created by Rebecca Woodall at Bluefrog Fundraising.

Associate Members

Rogare is supported in its work by a number of Associate Members - partners to the fundraising sector that share our critical fundraising ethos. Our Associate Members are:



Ask Direct
Creative agency (Ireland)



Bluefrog
Creative agency (UK)



Stephen Thomas
Full-service fundraising
agency (Canada)



Ethical
Telephone fundraising
agency (UK)