

NAYDO Ops Committee

October 13, 2022



PANEL

- **Alison Hansen**
YMCA of Greater Cincinnati
YMCA of Greater Louisville
- **Morgan Montgomery**
YMCA of Cass and Clay Counties
- **Shannon Rauen**
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BEST PRACTICES IN PHILANTHROPY

- No matter the campaign type – Annual, Capital, Planned Giving, Major Gifts – best practices remain constant.
- No matter the size of the campaign, best practices remain constant.
- No matter your role, everyone can implement best practices in philanthropy (you probably already are!)



BEST PRACTICES ...

- Attitude/Personality
 - Positive & Engaging
 - You set the tone, no matter your role!
 - How are you showing up for philanthropy every day?
- Expectations
 - Clearly Communicated & Realistic
 - No matter where they come from, advocate!



BEST PRACTICES ...

- Data Management
 - Establish and follow clear protocols for all data entry
 - If you can, centralize data entry
 - Create clear expectations with front-line staff
 - Your notes make a difference; be sure to capture them!
- Timing
 - Draft your calendar and solicit feedback
 - Share, share, share
- Communication
 - Be clear, be concise
 - Impact drives income



BEST PRACTICES ...

- Solicitation
 - Relational vs. Transactional
 - Know What Matters to THEM (+pivot accordingly)
 - Logical vs. Emotional Appeal
 - Diversification
 - Donor Portfolio
 - Partnership Opportunities
 - Abundance vs. Scarcity Mindset
- Stewardship
 - Benefits
 - Visibility, Engagement, Belonging
 - Return on Generosity
 - Share the Results/Their Impact
 - When you thank, thank!



SHARING RESOURCES

- Collateral/Idea Sharing
- Partnership Agreements
 - Leveraging Strengths
 - Deduplicating Efforts
 - Expanding Network
- Shared Staff
 - Centralizing Strategies
 - Room for customization



CONNECT

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