



WORKBOOK UNIT 2B:

Strong Relations with Your Donors





Unit Description:

The goal of Unit 2B is to build participants’ knowledge of approaches in philanthropy and donor relationship management and identify donor relations approaches suitable for their organizations.

Unit 2B has two sections. The first section looks at Strong Relations with Your Donors through Change the Game Academy’s Module 8; and the second section is Canadian content. The first section explores challenges and trends in philanthropy to better inform donor relationship management and donor relation plans. In the Canadian content, community-centered fundraising and its impetus is explored. Participants will also explore strategies and tools to develop a strong donor relationship management plan.

SECTION	LEARNING OBJECTIVES
Change the Game Academy	Explore current approaches, trends, and innovations in philanthropy
	Identify the key elements of a donor relations plan
	Assess your current donor relations activities
	Select the donor relations channels that are most appropriate to your organisation
	Develop a donor relations plan and calendar that is suitable for your organization
Canadian content	Identify the key characteristics of Community-Centric Fundraising
	Map specific opportunities and challenges for their organization’s donor relations

Links to Training Content:

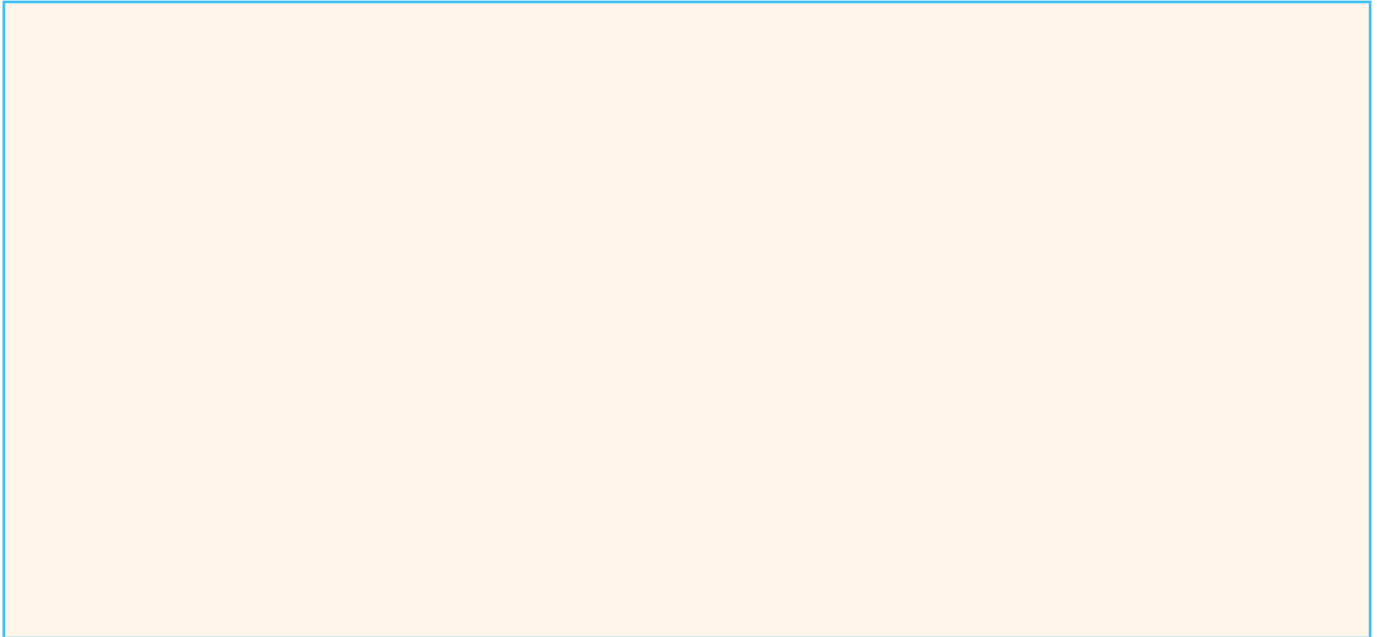
Change the Game Academy: [Strong Relations with Your Donors](#)

Canadian Content: [Spur Change Resource Library](#)

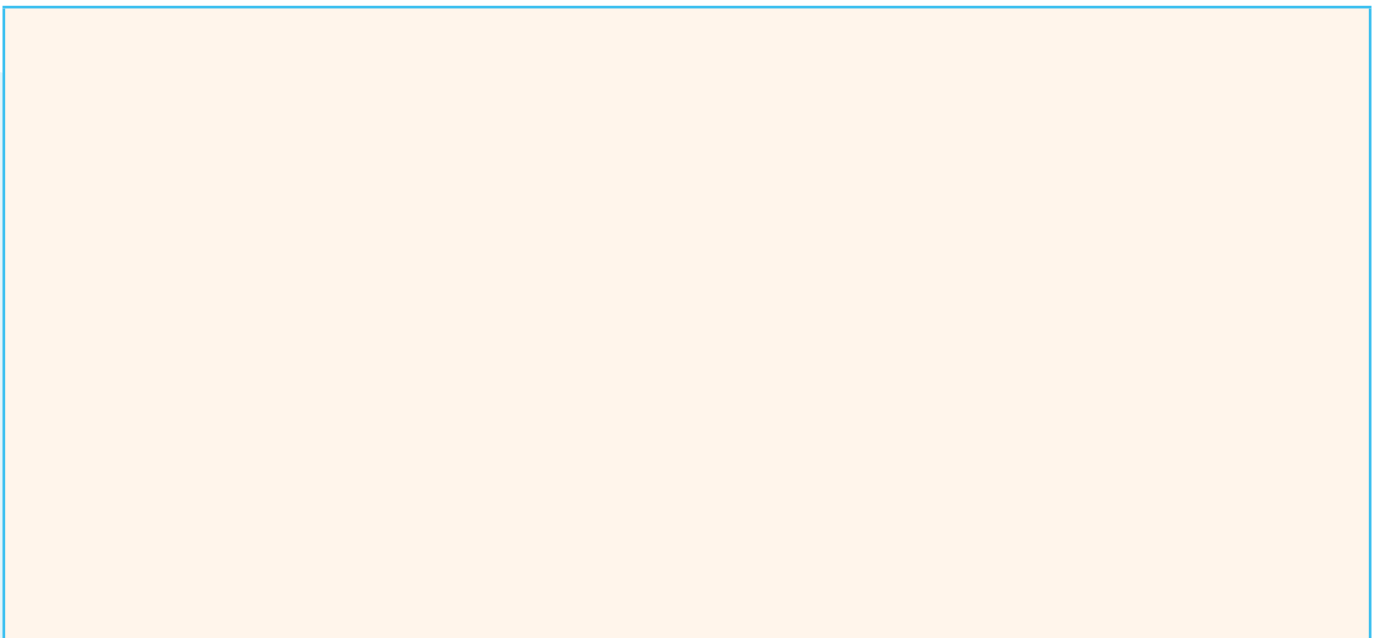
EXERCISE 1:

Build Out a Donor Relationship Management Strategy

When it comes to your organization’s donor relationship management strategy, what are some methods you have used as part of your work, either with your current organization, or past organizations?



What methods have been successful? What didn’t work, and what lessons were learnt? Share your reflections in the box below.



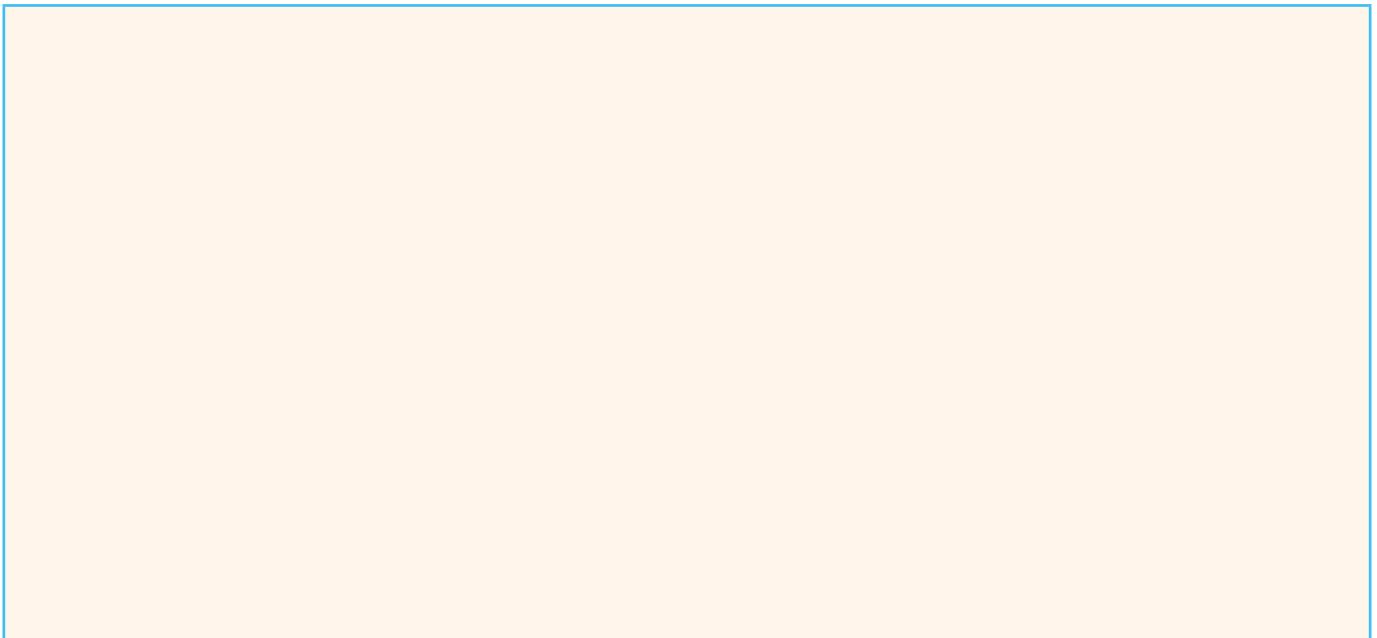
EXERCISE 2:

Build Out a Donor Relationship Management Strategy

After going through Unit 2B's materials, what are some donor relationship management methods you would like to try?



What would enable success in applying these methods? What could detract from successfully applying these methods?



EXERCISE 3:

Comparing CRM Systems

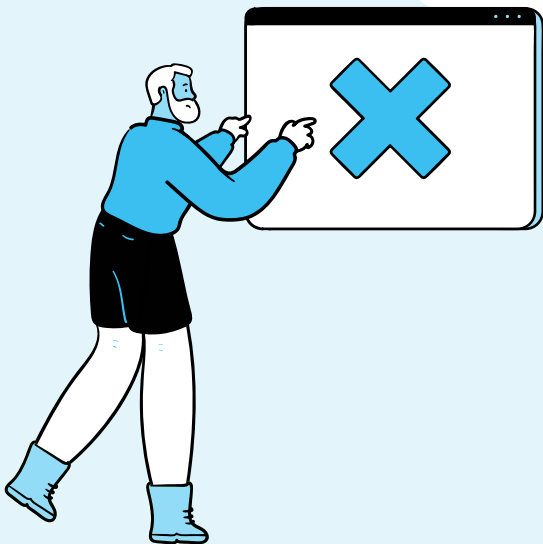
If your organization currently doesn't use a CRM system, review the various free CRM options shared during this Unit, and compare the functionality of each. Select and register for at least one free option and explore the features.

Have a look at this [resource](#) on key considerations for choosing your CRM.

We have provided a table for you to reflect on each CRM software mentioned in Unit 2B. Please feel free to add rows if you discover other CRM software that you would like to compare.

CRM SOFTWARE	Would this meet the needs of your organization? Why or why not?	Does the CRM seem user-friendly?	Is this software cost efficient?
<i>Hubspot</i>			
<i>Keela</i>			
<i>Bitrix24</i>			
<i>Bloomerang</i>			
<i>Zoho</i>			
Others			

Use this space to add additional thoughts related to Exercise 3 :



UNIT 2B RESOURCES CITED:

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LEARN MORE!

[*Racial Equity Resources*](#)

[*Grantmaking with a Racial Equity Lens Guide*](#)

[*Unfunded Report*](#)

[*Innovations in Global Philanthropy*](#)

[*Tech Soup*](#)

[*CCF*](#)



