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10th Annual ADRP NYC Regional Conference

Friday, June 10, 2022

Building Trust -- The Key to Increased
Giving, Enhanced Reputation, and Job Satisfaction

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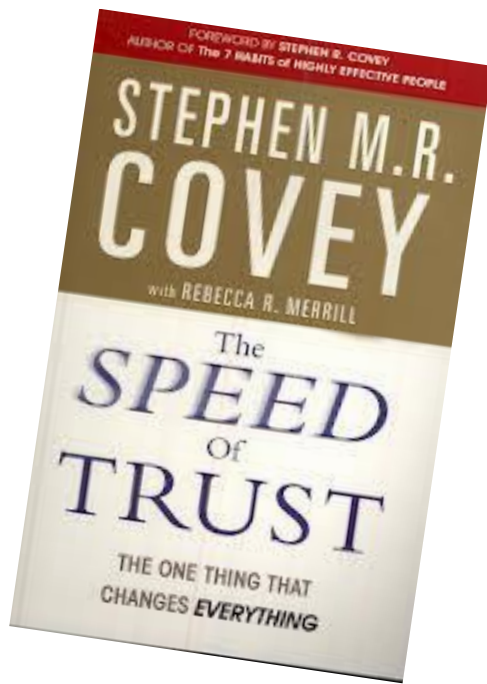


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The Osborne Group, Inc.

Defining Trust



1. What is the difference between being trusted versus being trustworthy?
2. In your experience, what role does trust play in internal and external relationships?
3. To what degree do your donors trust your organization?
4. To what degree is your department trusted by your colleagues?



13 Behaviors Important to Trust and Credibility*

*The Speed of Trust, Covey

Character

1. Do you talk straight, say what you mean
2. Do you demonstrate respect for the other person's work, ideas, time, expertise
3. Are you transparent, do you help create transparency
4. Do you right wrongs
5. Do you show loyalty

Competence*

*The Speed of Trust, Covey

6. Deliver results
7. Get better (fail forward, constantly learn and improve)
8. Confront reality
9. Clarity of expectations up front
10. Practice accountability

Competence + Character*

*The Speed of Trust, Covey

11. Listen first for intent; listen to understand
12. Keep commitments; don't overpromise and under deliver
13. Extend trust to others



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Credibility*

*The Speed of Trust, Covey

- Integrity – truthfulness, walking the talk, humility and courage
- Intent – motive of caring; I want you to win as much as I want to win
– acts in others’ best interests, mutual benefit
- Capabilities – talents, expertise, knowledge, you are current, relevant
(are you relying on yesterdays’ expertise to address today’s problems?)
- Results – performance track record, personal and organizational,
Societal Return on Investment

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Translations?



1. How do the 13 behaviors translate for a department?
2. For an organization or institution?
3. What is your role in building trustworthiness?
4. How might perceptions be different for people from diverse backgrounds, experiences and generations?

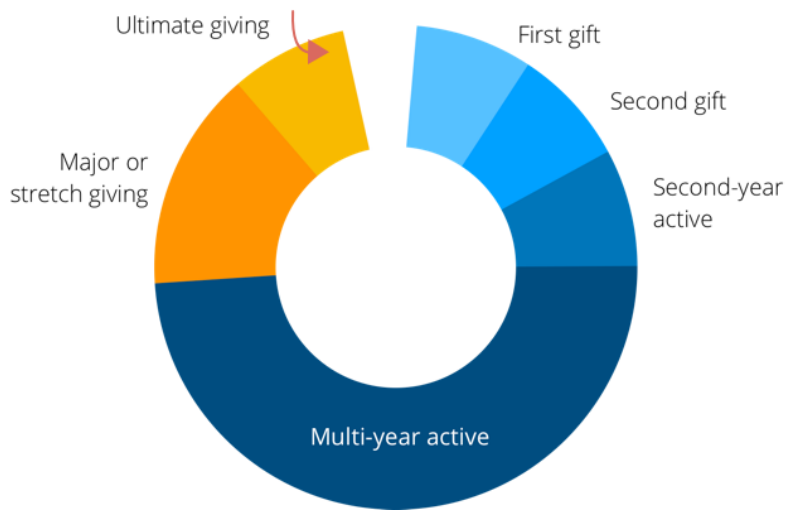
Stewardship and Accountability

- **Spending** as agreed
- **Managing** prudently
- **Documenting** accurately
- **Acknowledging** within 24 to 72 hours
- Providing **recognition**
- **Demonstrating significance and impact**
- **Providing joy through moments and experiences**



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CIRCULAR DONOR LIFECYCLE VIEW



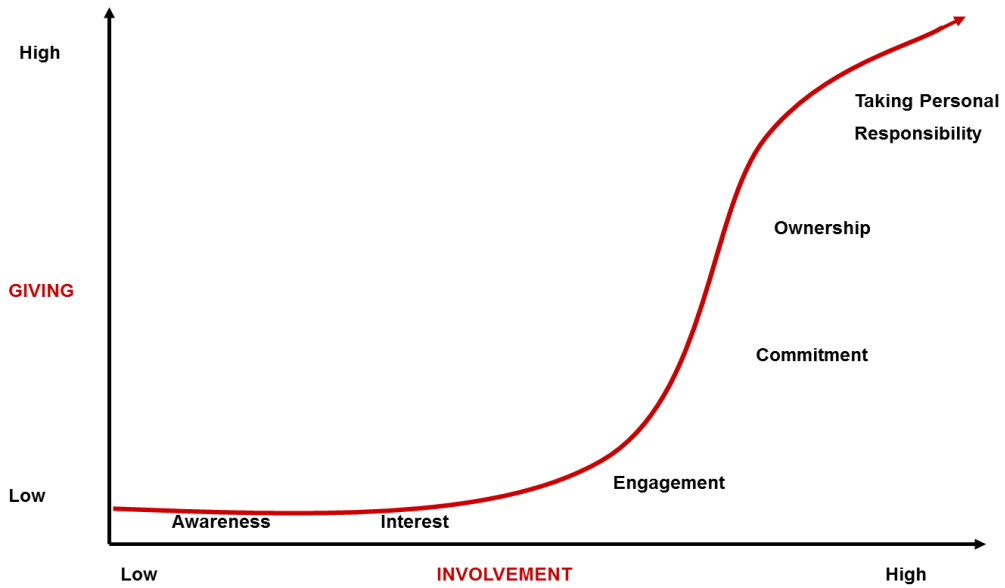
**Kindful*



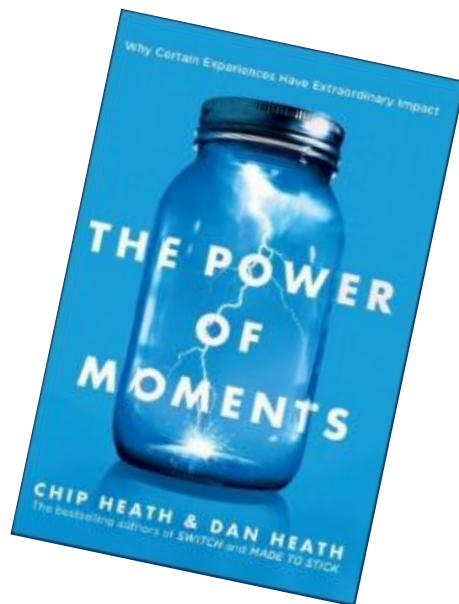
Donor Journey Model

The Tarnside Curve of Involvement

**Developed by Patrick Boggen, Tarnside Consulting, UK*



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Know Your Data

- Global Study – Elderman Trust Barometer 2022
 - 36,000 people; 28 countries
 - Are NGOs getting results – 57% yes
 - Solving societal problems – 55% yes
 - Trusted – most marked neutral between trusted and not trusted
- What are your numbers?





Be Sure to Also Use a DEI and Generational Lens

Know Your Numbers

Retention & Upgrades

- New donors
- 2nd Year donors
- 3 Year+ Donors
- By channel
- By size

Table of Gifts Metrics

- Donor Pool Spread
- Number of donors
- Prospective donors needed
- By giving level

Other Key Metrics

- ROI & Cost per Dollar Raised
- Lifetime Giving
- Yes Rates
- Donor Satisfaction and trust levels

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Mission Measurement Why It Matters, Why It is Happening

- Individual donors, and an increasing number of foundations, are demanding more mission measurement.
- They want to have societal impact.
- HNWI philanthropists are focused on systemic change



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PLUS, It Helps You!

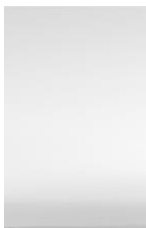


Metrics-Based Strategies

	Year 1	Year 2	Year 3	Actions
Retention	55%	65%	75%	2x Impact Reports Thank-A-Thon Welcome Packet
Upgrades	10%	20%	35%	Vision Meetings Suite of Engagement Ops
Donor Satisfaction & Trust	70% "Very Satisfied"	80% "Very Satisfied"	90% "Very Satisfied"	Segmented, personalized stewardship
Average Gift Size	\$200	\$220	\$270	Segmented asks Middle level Donor Visits
Cost per Dollar Raised	\$0.18	\$0.15	\$0.12	Outcome of increased stewardship & upgrades

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Taking Action



1. Collect information
 - Including data from donor trust and satisfaction survey
2. Identify and recruit champions
3. Develop (or enhance), in partnership, a three-year stewardship strategic plan
 - Vision, values, SMART goals, objectives and action steps, RASCI, budget
4. Name and solve for, obstacles and motivators for change

Action Planning -- Focus

High Impact Harder to Implement PLAN	High Impact Easier to Implement ACT
Less Impact Harder to Implement DON'T DO	Less Impact Easier to Implement REV UP or ABANDON

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“ You have to decide what your highest priorities are and have the courage - pleasantly, smilingly, nonapologetically - to say 'no' to other things. And the way to do that is by having a bigger 'yes' burning inside.”

— STEPHEN COVEY

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