



The Journey to Bold Asking®: Lessons in Powerful Philanthropy For Uncertain Times

Toolkit 1: Creating your “Signature Language” to Build Connection and Meaningful Relationships For Transformational Gifts Even in Uncertain Times

“Language is very powerful. Language does not just describe reality. Language creates the reality it describes.”
-Desmond Tutu

Since COVID-19, we have been navigating through an almost unimaginable world. The challenges of the time require all of us to deepen our practices and hone our skills. We must continue to re-create and re-imagine how we work and move forward. Vision Philanthropy Group is presenting the first in a series of toolkits to help organizations as we continue to emerge through this unprecedented time.

No doubt, the effects will be long lasting. History and research tell us that it is during times like these that the best in philanthropy shines and leads. In fact, philanthropy, no doubt will play a decisive role in solving some of our deepest and most challenging problems as we move forward and emerge. As philanthropy leaders, we must ask ourselves: ***Are our leaders, boards and staff up for the challenge? Are they armed with the resources and tools they need to succeed during these times and afterwards? And, how will we emerge even stronger long past this pandemic?*** Now is the time to prepare to emerge stronger than ever!

Let's start with the fundamentals: strong, meaningful relationships.

Some of the most common roadblocks we hear when it comes to engaging prospects and donors is, “How do I to open the conversation?”, “Where do I start?!”, “I'm not comfortable talking to my friends.” Or, “How do I move the conversation forward?” We hear this from board members, the C-suite executives and sometimes even from the philanthropy staff.

Developing your own unique “Signature Language” is one of the first steps to creating meaningful and authentic conversations. It’s a powerful tool in your team’s toolbox. And, let’s be clear, by team, we’re referring to board members, fundraising volunteers, C-suite executives and other leaders and the philanthropy staff.

This is a time for the entire team to redouble their efforts and demonstrate their very best. We hope honing your “Signature Language” will be the first step you will take in adding new, practical and meaningful skills to your toolbox.

WHAT IS SIGNATURE LANGUAGE AND WHY IS IT IMPORTANT?

Signature language is the way you personally articulate an organization’s deep, personal value to you as well as its distinctive and meaningful mission. Over the years, we have seen that, for many people, this may be very difficult. It’s a shame because messages that could be very powerful, instead become unclear or confused, and opportunities are lost.

Sometimes, we become uncomfortable. Describing what is most meaningful in our lives is a deeply personal thing. Sharing personal stories or describing the organization’s most meaningful value in our lives requires courage. And, yes, these stories may even make us vulnerable. Ouch! Vulnerability is not something many of us are comfortable with.

In fact, few CEOs or board members are comfortable with vulnerability. Frankly, neither are development officers!

As Brené Brown writes in her book, Daring Greatly that most of us develop armor around ourselves to protect ourselves from vulnerability.¹ Few of us are comfortable with exposing our emotions, like those shared through personal stories. It puts us at risk of not knowing how others will perceive us. Just like this pandemic, the uncertainty of vulnerability can feel pretty bad.

So, instead, we tend to lean into data, opting out of powerful and even emotion-tied stories.

Don’t get me wrong, there’s nothing wrong with data. In fact, data undoubtedly will be one part of the story. But data rarely connects with deep emotion (unless it is fear). Data simply are not memorable. Stories, that is, personal stories, have the power to deeply connect and move others.

Brown goes on to say, “When we spend our lives waiting until we’re perfect or bulletproof before we walk into the arena, we ultimately sacrifice relationships and opportunities that may not be recoverable. We squander our precious time, and we turn our backs on our gifts, those unique contributions that only we can make.” Wow, how true! We are certainly not immune to this in the fundraising world. We tend to spend a lot of time processing, even putting off the matter at hand. That is, deeply engaging with and *boldly* inviting people who care deeply about our organization to *participate and invest* in it.

¹ Daring Greatly. How the Courage to be Vulnerable Transforms the Way We Live, Love, Parent and Lead, Brené Brown, 2012.

The armor we put up keeps us from exceling. At VPG, we have found that creating our unique “Signature Language” helps each member of the philanthropy team (from executive, to board member and the philanthropy staff) have the confidence and comfort they need to be successful. “Signature Language” helps the team

- Become courageous, perhaps even bold!
- Connect deeply with constituents, prospect and donors
- Manage vulnerability and
- Begin to actively listen and understand the other person’s unique interests, values and connections to the institution.

CREATING YOUR “SIGNATURE LANGUAGE”

This is a time to for all of us to examine what really matters to us, to reflect on our priorities and what is most meaningful in our lives. Our interdependence upon one another has become even more evident. And, the need for basic human connection and relationships has become more and more real on a daily basis. We must be bold! We must step up and use this time, even during its great uncertainty, to invest in building meaningful connections for the institutions we serve. They are depending on us like never before.

Begin with the development team, deepening their insight, skills and confidence.

For The Development Team

Use these exercises to begin building new skills, and affirming others, with the frontline fundraising team. This is also a great team building exercise! Involve everyone from the annual giving program to the major and principal gifts team. This will have positive benefits across the program. All development officers have the potential to help shape the culture and influence others in the institution with their “can do” attitude, even in our current virtual world.

Instructions:

Start by asking the team to work on the exercises independently. They will need to devote about an hour to reflect and prepare. After reflecting on each series of questions, everyone comes to the group meeting prepared to participate in small break out groups and share their answers. This may take some courage, because undoubtedly the group may feel vulnerable. Encouragement and role models who are ready to share are pivotal to a successful experience! So, make sure a few people are ready to lead!

Convene the group, and, depending on the size and style of the team, it may be best to break out into small virtual discussion group. Large teams will benefit from smaller discussion groups. At the conclusion, answers to the series of exercises should be shared and discussed with the full group.

The exercises involve a series of questions. To do justice to the exercises, we suggest conducting the exercises over several sessions. Three sessions are optimal. After reviewing the exercises, you can determine what works best for your organization; one, two or three sessions. Three sessions will give the team time to reflect, refine and then share their thoughts. The importance of individual reflection before working in groups cannot be overstated.

Session One

Exercise 1: “Centering”

- Why are you here? Why did you join this organization/institution?
- What do you hope to accomplish by joining the organization?
- What are your goals, and even your vision, for being a part of this organization?
- Curiosity is very important in all aspects of life. What are you most curious about this organization? Can you see that curiosity being maintained over time? Why and how?

Exercise 2: “Identifying Value Proposition and Social Connection”

- What do you value most about this organization? Does this reflect your personal values?
- What, if any, are your personal connections to the organization?
- Are your personal connections to the organization reflective of your personal values?

Exercise 3: “Employing Gratitude and Empathy”

- Who and what are you most grateful for in this organization?
- Who inspires you?
- What annoys you most about the organization?
- Describe what empathy means to you. Give a specific situation when you think you were empathetic (it does not necessarily have to be in your work at this organization).

Session Two

Exercise 4: “Defining Impact”

- What does this organization mean to the community?
- What is its impact on your region?
- Does the organization have an impact on the world?
- How is it making an impact?
- Is it changing lives? How?
- What would the community, region, or even the world look like without it?

Exercise 5: “Projecting Your Authentic Self”

- What is your singular intention when you meet with a donor, prospect or constituent besides closing the gift? How do you remain mindful of that intention?
- How do you show up and remain present, even in a remote setting, when meeting with a prospect?

- How do you make sure you are listening more than you are talking? Give a couple of tactics.
- Give five examples of the most powerful questions you can/should ask when meeting with a prospect or donor.

The series provides an opportunity to discuss and deepen tactics for donor and prospect meetings by employing: 1) Intention 2) Staying present while listening and 3) Asking powerful questions.

Session Three

Exercise 6: “Your Story”

- Write a story (a real story versus a series of examples) about how the organization is changing lives. Who are the people that make this possible? Whether you include it in the story or not, reflect on whether this story reflects your personal values and your gratitude for the organization. How does this influence the way you tell the story?

Exercise 7: Creating your “Signature Language”: This is what we like to call your “Molecular Fingerprint”

Now, write a series of short statements that describe the organization. These should reflect what you learned as a result of the series of exercises. The statements should reflect your *authentic and genuine voice* based on your value, gratitude and impact statements in the above. Examine how you bring your intention, your empathy and your presence into those statements. Identify how you will use these statements when meeting with a prospect or donor. Plan and then practice how you can use them when introducing, opening, leading or closing a conversation.

At the close of the final session, invite the team to share examples of their “Signature Language” and discuss how and when they can put them to use. We also recommend even setting up practice sessions before donor or prospect meeting to comfortably execute.

Next, introduce the series of exercises to the CEO and Executive Team to 1) build alliances and partnerships, 2) enhance your philanthropic culture and 3) develop new skills and tools.

For The Executive Team:

Helping the executive or management team and other leaders create their own “Signature Language” is a great way to begin elevating powerful new partnerships between executive leaders and the development team. The process helps build comradery and begins to get people on the same page simply by talking about and sharing meaningful experiences, insights and values within the context of philanthropy. At a minimum, the exercises provide a framework for building partnerships across the organization.

The executive team’s readiness to participate in this exercise varies greatly. In some cases, the number and types of questions included in the exercises should be customized. The

forum, however, provides important opportunities to introduce or hone basic major and transformational giving concepts.

Instructions:

Begin by preparing and educating your CEO. It is essential to you have the leader's full buy-in and committed leadership to the process. As in everything in life, timing and readiness are everything. It is even more delicate now while leaders are grappling with such challenging issues. But, participating in this series of exercises help build community and keep philanthropy visible while teams are dispersed.

Before you begin, with the CEO:

1. Determine the goals *the team* wants to accomplish with this series of exercises
2. Define what success will look like and
3. Agree on how the material will become operationalized, revisited and practiced.

Participation in the exercises will require an investment of time and a commitment to seeing the process through. Once the time is right, you may want to begin by introducing the concept of a culture of philanthropy and preparing the team by administering the Culture of Philanthropy assessment tool designed by VPG. (You may take the survey via our online surveys. [For nonprofit organizations.](#) [For nonprofit hospitals and healthcare organizations.](#))

When VPG leads these workshops, we take the executive team through the same series of exercises. However, we modify Exercise 5. to reflect the executive team members' participation in a prospect meeting as a partner with a member of the development staff. Exercise 5. also provides a framework for discussing the roles the executive team and development staff play as powerful partners in fundraising and philanthropy.

Finally, introduce your board, development committee or campaign committee members to the power and comfort of their "Signature Language".

For the Board, Development Committee Or Campaign Committee:

Engaging the board, and sometimes even the development committee, in fundraising can be one of the most challenging tasks of any development professional. Over many years of working with dedicated board members, we've found almost all want to help. But, oftentimes, they just don't know how. Most truly want to make a difference in the organization, but many are frustrated because they do not feel equipped to effectively and *comfortably* partner with the staff in the fundraising program.

Or, they are simply uncomfortable with fundraising that goes beyond a mere transaction.

One of the greatest challenges of this time is how to connect virtually with donors and prospects. Building relationships with new prospects is even more daunting. This is a time, perhaps more than ever before, when board and development committee members rely on guidance for how they can partner in moving the philanthropy program forward.

The process of developing their “Signature Language” will guide the board in thinking deeply about their own values, gratitude, inspiration and goals. Creating their uniquely distinctive “Signature Language” is one step in helping to equip them with the tools they need to be effective, knowledgeable and confident partners.

It is one step in de-mystifying major gift fundraising, moving from transactional to transformative gifts!

Instructions:

Thoughtful planning with your CEO and board chair are *a must*. Ask your CEO to set aside time to engage the board chair and then the board in a thoughtful conversation about philanthropy and philanthropy training. This is also an opportunity to examine the institution’s philanthropic culture and the practices that are needed to keep the program moving forward and even emerge stronger. You may even invite them to participate in the Culture of Philanthropy Assessment Tool above before moving into the program.

Planning how and when these exercises are introduced is critical to their success. Begin by determining whether the exercises should be a part of a larger philanthropy training program, or if it would make sense to present them as a part of a board retreat or as a philanthropy discussion during a special session.

With the CEO and board chair:

1. Discuss the perspectives of the philanthropy program that prevail and the board’s role in it.
2. Identify the board’s strengths and weaknesses as partners in philanthropy, as givers and as doers.
3. Determine the goals for these exercises or for a more extensive philanthropy training program.
4. Identify how and when the series and training will be rolled out. Timing is very important!
5. Define and agree to what success will look like.
6. Identify board activities, reading and homework that should occur in advance to prepare the board to participate and identify who will lead them.

VPG consultants lead board, development or campaign committee members through the same series of exercises that have been customized to the uniqueness of the group. Although the exercises typically occur within the larger context of the **Bold Asking®** philanthropy workshops, they can also be a useful tool to deepen connections and relationships with volunteers. For example, the exercises may be a part of discussions during a retreat or special session on philanthropy on how to be an effective philanthropy leader.

The process of creating their “Signature Language” provides volunteers with an opportunity to step back, reflect, examine and reaffirm their relationship to and belief in the organization. It invites everyone to share their values, meaningful experiences, gratitude, intention, inspiration and connection. And, while doing so, they will share

personal and powerful stories. Indeed, stories that will be new to many in the organization!

Once the group understands the background and goals for the exercises, begin by presenting the exercises and defining the time allotted. Time should be given for individual work. Then, break into small break out groups to share and discuss. Return to the large group for report outs and a facilitated discussion of how to use them. Be ready for powerful stories to emerge!

CONCLUSION: A LITTLE CONTEXT FOR OUR WORK IN “SIGNATURE LANGUAGE”

Several years ago, one of our clients asked us to help train their board and faculty in the nuances of major gift philanthropy and fundraising. We were thrilled to have the opportunity to help. Over time, VPG developed **Bold Asking®** into a full training, education and coaching program for executive leaders, board and campaign committee members, faculty and physicians, and philanthropy staff. Our goal is to help arm teams with the tools and skills they need to be effective partners in creating truly transformational giving. Crafting “Signature Language” is just one step in the **Bold Asking®** program.

In **Bold Asking®**, we begin by assessing the elements required to support a high-performing transformational and major gift fundraising program. We examine:

- The institution’s culture of philanthropy
- The board and executive leadership team’s participation in fundraising activities
- The development team’s unique strengths and weaknesses
- The case and strategic objectives that compel the organization’s stakeholders, and
- The CEO, executives, board and staff’s skills, competencies, beliefs, attitudes and comfort with major and transformational giving.

The **Bold Asking®** workshops, small group training and one-on-one coaching:

- Deepen the team’s skills in the language of philanthropy and bold asking,
- Elevate the beliefs, attitudes and behaviors that shape the philanthropic culture
- Sharpen the skills needed to be a high performing team and philanthropy program, and
- Create powerful partnerships that support a robust major and transformational giving program.

We invite you to contact us about how we can help you train, educate and coach high performing and effective teams that elevate transformational and even bold giving at your institution.

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