



**Omaha
Community
Foundation**

Growing good,
together.

Nonprofit Success Series

Navigating Funder Relationships to Sustain Success

Tessa Barney, Chad Allen, Joey Felici

June 17, 2025

Introductions



Nathan Morgan
Donor Services Advisor



Dasia Horne
Sr. Program Manager



Panelist Introductions



Tessa Barney
Director of Philanthropic Services



Chad Allen
Donor Services Advisor



Joey Felici
Senior Donor Services Advisor



Introductions at Your Table

- Name
- Organization
- Your Organization's Elevator Pitch



Our Mission and Vision

Mission

We maximize the power of philanthropy to strengthen our community.

Vision

A connected community of passionate philanthropists, strong nonprofits, and thriving residents.



**Omaha Community
Foundation**



What is a Community Foundation?

- 900+ community foundations nationwide
- Structure: 501(c)(3)
- National Standards Accreditation
- Giving tools
 - Charitable giving funds
 - Concierge level service
 - Community connections
 - Partner grantmaking

Who We Serve



NONPROFITS

- Fund for Omaha
- African American Unity Fund
- Futuro Latino Fund
- Equality Fund
- Neighborhood Grants Program
- Nonprofit Capacity Building



COMMUNITY

- The Landscape
- CAP[®] Program
- Omaha Venture Group
- Nonprofit Capacity Building
- Community Loan Fund
- Community Resilience Fund
- Government Partnership Grantmaking



DONORS

- Giving Funds
- Legacy Giving
- Family Giving
- Corporate Giving
- Philanthropic Support Services



OCF's Impact

- **2,000+** Donor Funds
- **\$240M** in grants processed in 2024
- **17,000+** grants to **3,200** nonprofits



Mission in Action

- **Strong Nonprofits**

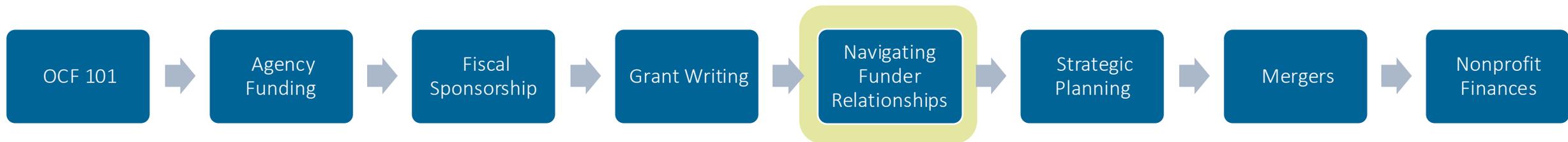
OCF Serves as a capacity building resource to strengthen the vital community of nonprofits to support diversified funding streams and sustainability.



Mission in Action: Capacity Building Series

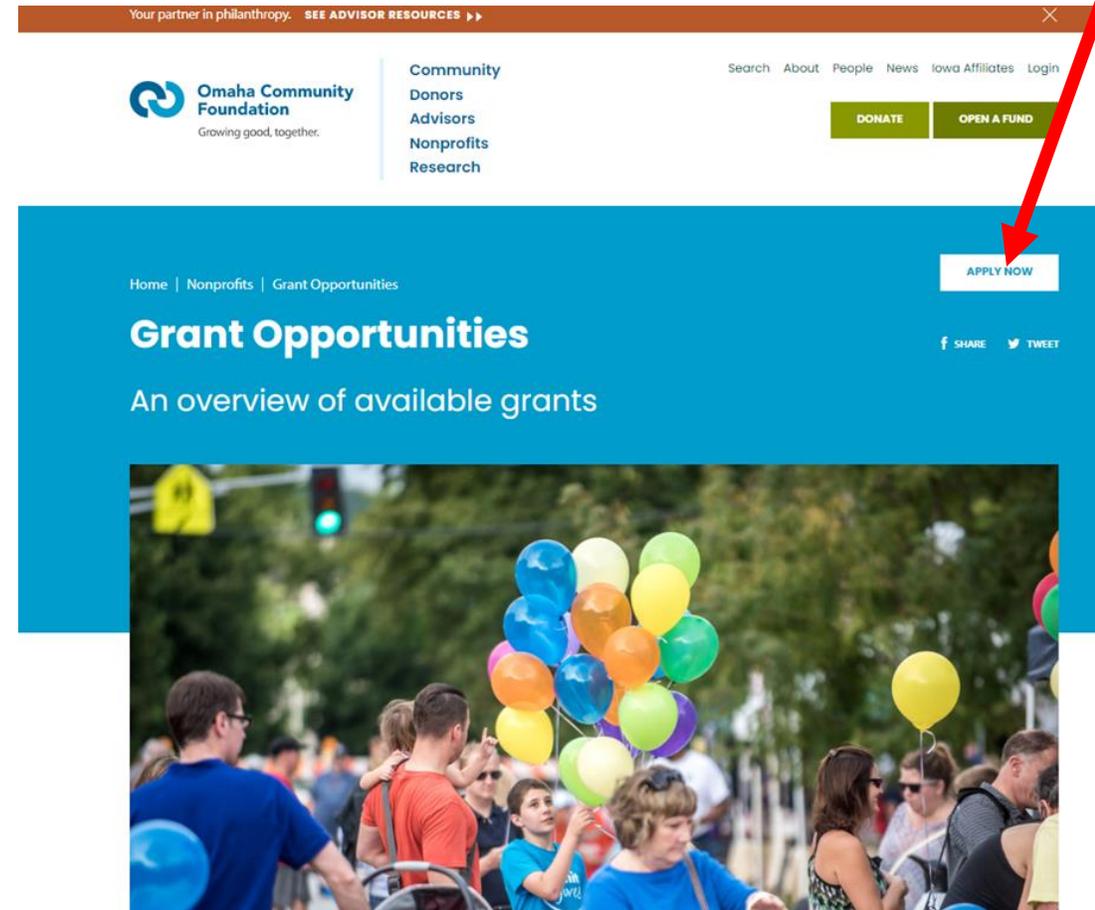
- **Building Resources**

Each session of the Nonprofit Success Series builds upon the content of the previous session. The goal is to equip nonprofits to thrive and meet their mission.



Community Investment Programs

- **Community Interest Funds:**
January 1-March 1
 - Omaha Neighborhood Grants
 - African American Unity Fund
 - Futuro Latino Fund
 - LGBTQIA2S+ Equity Fund
 - Refugee Community Grant Fund
- **Field of Interest Funds:** June 1-July 15
- **Building Healthy Futures:** July 1-August 1
- **Fund for Omaha:** July 1-August 1
- **Nonprofit Capacity Building Program:**
Summer



Upcoming OCF Workshops

Strategic Planning

July 23 at noon

Security National Bank

Successful Mergers

August 21 at noon

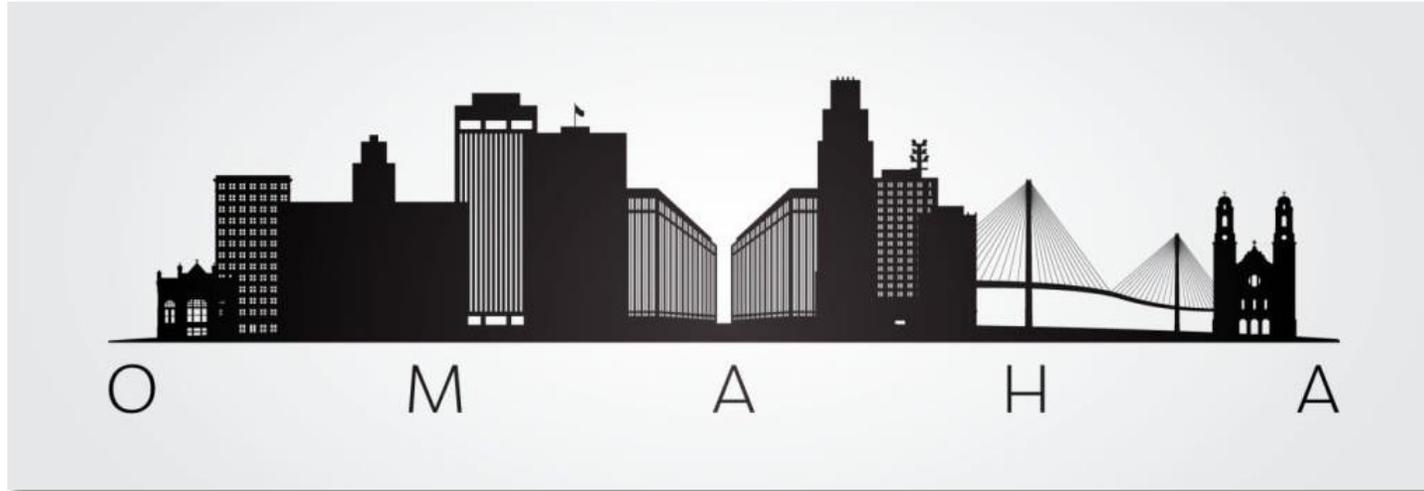
Security National Bank



Navigating Fund Relationships: Workshop Agenda

- Introduction & Importance of Funder Relationships
- Dream Donor Persona
- Building Authentic Relationships
- Framing Your Ask
- Stewardship in Action
- Tools & Metrics for Success
- Quick Wins
- Q&A





Omaha is one of the most philanthropic cities in the United States, ranking in the top 3% of per capita giving.

Nebraska grant makers allocate more than 60% of their grant dollars to local organizations.



Why Do Funder Relationships Matter?

- Strong relationships lead to...
- Deeper Impact
- Organizational Financial Health
- Elevate Your Profile and Increase Awareness



**“People give to people,
not institutions.”**

-Jerold Panas

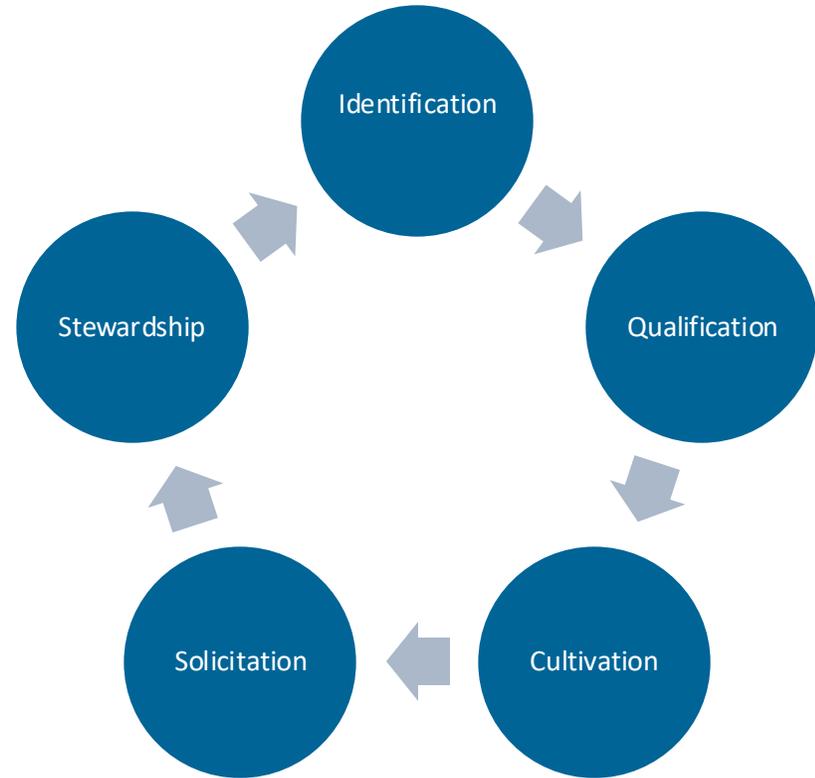


Funder Engagement

Donor Journey



Fundraising Cycle



Create a Dream Donor Persona

- **Demographics**

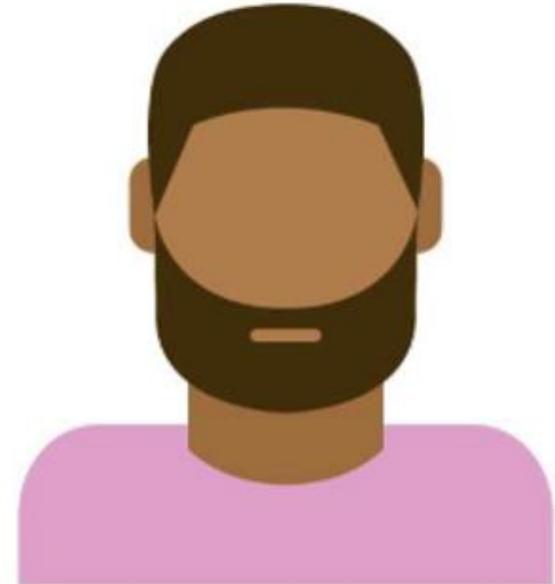
- Age, occupation, household income, education, career industry, political affiliation, religion

- **Psychographics**

- Attitudes, passions, motivations, personality, values, opinions, lifestyle

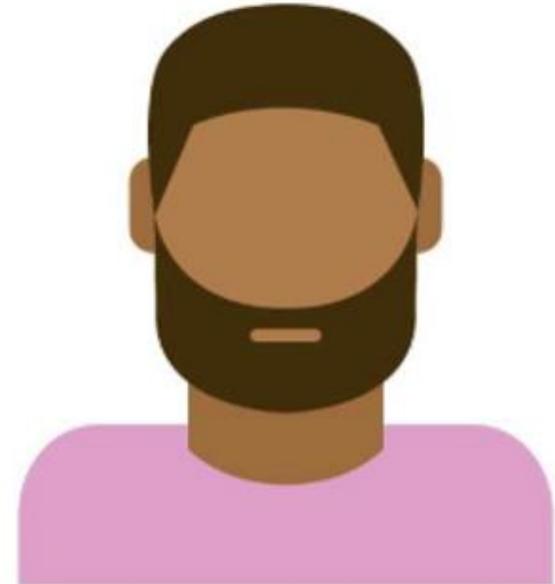
- **Giving Habits**

- Monthly, annually, events, volunteer involvement



Create a Dream Donor Persona

- **Engagement Timing**
 - Monthly, quarterly, annually
- **Engagement Level**
 - Insider knowledge, impact data sharing, personal



Donor Persona Activity

Create a Dream Donor Persona

	DEMOGRAPHICS NAME EDUCATION LEVEL MARITAL STATUS PREFERRED MEDIA HOUSEHOLD INCOME
PSYCHOGRAPHICS	GIVING HABITS
ENGAGEMENT TIMING	ENGAGEMENT LEVEL

Building Authentic Relationships



- **Personalization**
 - Tailor communications
 - Use donors' names, gift histories, and interests
- **Listening**
 - Use surveys, calls, and events to gather donor feedback



Building Authentic Relationships



- **Gratitude**
 - Beyond the thank you letter
 - Consider videos, handwritten notes, impact tours
- **Consistency**
 - Keep communication going between campaigns
- **Time**
 - Pace engagement for long-term success



Framing Your Ask

- **Alignment**
 - Ensure your mission and outcomes align with the funder's objectives
- **Case for Support**
 - Be clear, concise, and compelling
- **Know Your Numbers**
 - Financial documents need to be accurate and transparent



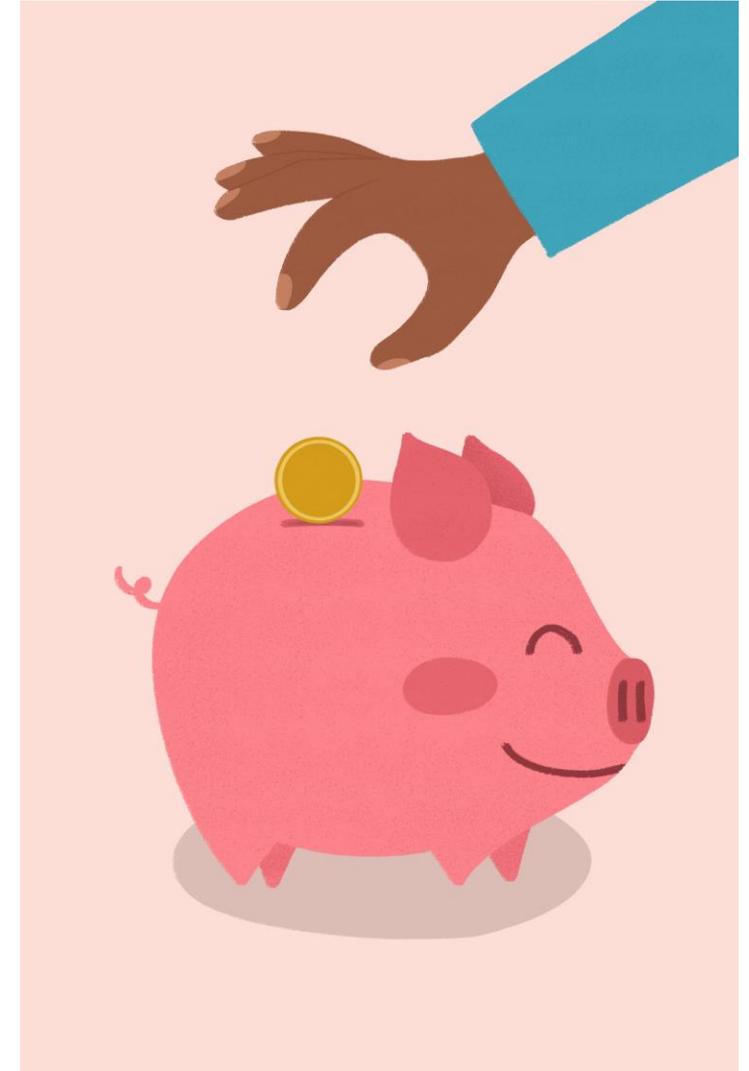
Framing Your Ask

- **Appropriate Amount**
 - Amount is appropriate for funder's capacity and engagement



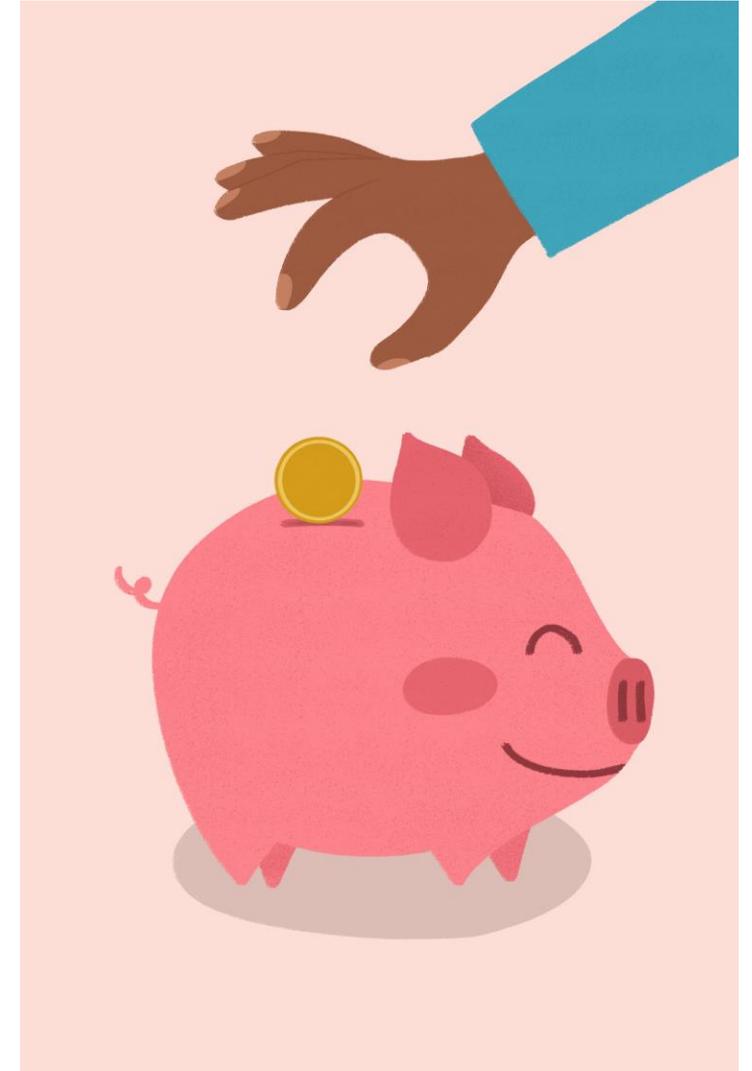
Stewardship in Action

- **Acknowledgement**
 - Timely and personal
- **Honor donor milestones**
 - Donor anniversaries (1-year, 5-year, etc., birthdays, deaths)
- **Share impact reports with visuals**
 - Show real-life change using visuals



Stewardship in Action

- **Host events**
 - Behind-the-scenes tours, coffee/cocktails with leadership or clients
- **Feature donor stories**
 - Highlight their stories



Mindset Shift - Donors as Partners

- Involve donors in program development
- Seek their input on initiatives
- Maintain transparency about challenges



Tools & Metrics for Success

- **Utilize CRM Systems**
 - CSuite, Salesforce, Bloomerang, Donor Perfect, etc.
- **Track Key Metrics**
 - Retention rates
 - Lifetime value
 - Engagement levels
 - Response rate to stewardship touches



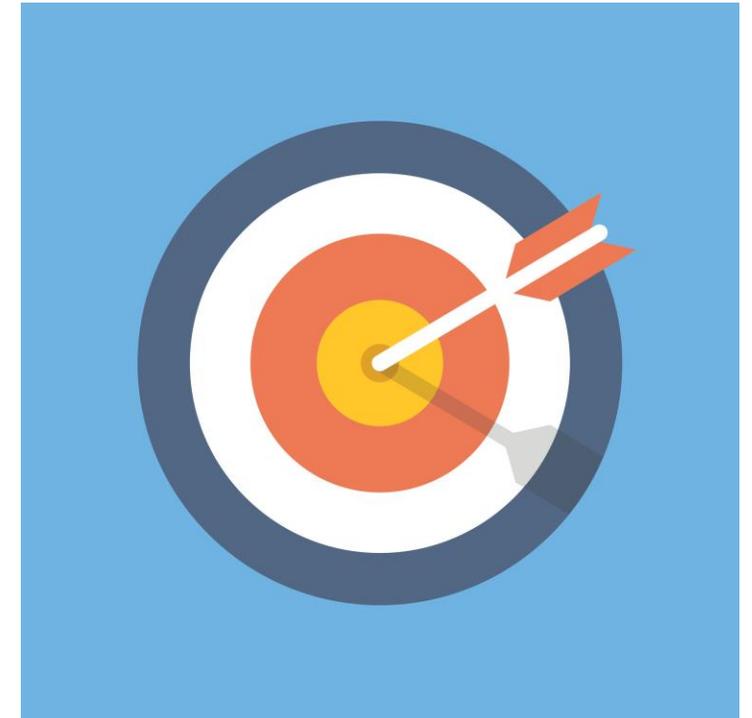
Donor Personas & Expectations

- **Major Donors**
 - Seek impact data and personal engagement
- **Monthly Givers**
 - Value consistency, want the “insider” experience
- **Corporate Sponsors**
 - Look for alignment with brand and employee engagement
- **New Donors**
 - Need strong onboarding and education



Quick Wins

- **Audit and enhance the thank-you process**
 - How fast, how personal, handwritten notes
- **Develop donor onboarding materials**
 - Emails/videos
- **Segment communications based on donor behavior**
- **Schedule regular gratitude outreach**
 - Phone calls, emails, etc.



**Your mission may attract
donors, but your
relationship will keep
them.**



Q& A Panel

Tessa Barney, Director of Philanthropic Services

Chad Allen, Donor Services Advisor

Joey Felici, Senior Donor Services Advisor



Thank you!

**Please Take 5 Minutes
to Complete a Brief
Evaluation of the Workshop**

Please Contact Us with Any Questions:

Dasia@omahafoundation.org

Nathan@omahafoundation.org

