Relationships in Fundraising

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I. Introduction

Relationships are the heartbeat of fundraising—or so it is often said. But when fundraisers and fundraising consultants discuss relationships, they most often mean personal connections with donors or potential donors. This focus makes sense—after all, philanthropy is most often associated with personal solicitation. The common phrase, "people give to people," seems to solidify that generalization.

Yet in the process of working at raising funds for nonprofits and learning principles and skills at the Lilly School of Philanthropy (and subsequently earning my CFRE), I discovered that effective fundraising requires us to see a much larger picture. Fundraising depends on relationships - all relationships. At every level, the most successful practitioners learn to understand and nurture connections beyond the donor handshake.

II. Beyond People-to-People Connections

What if we considered fundraising as an ecosystem where multiple types of relationships interconnect and support each other? This perspective invites us to think more systemically about our work, recognizing that sustainable fundraising emerges from healthy relationships across multiple dimensions.

Consider how these human relationship categories create the foundation for everything else:

A. Internal Relationships

These relationships form the foundation of everything we do. When board members trust leadership, when program staff see fundraising as mission-critical rather than a necessary evil, when finance views development as a strategic partner—that's when fundraising can truly flourish. The most effective gift officers invest significant time cultivating relationships with program directors, understanding their work deeply enough to articulate impact with genuine authenticity.

However, internal relationships present unique challenges for fundraising professionals. We often find ourselves in positions where we can clearly see systemic problems that impede fundraising effectiveness, but lack the organizational authority to fix them directly. Decision-making bottlenecks, bureaucratic delays, and timing misalignments create what we might call "organizational friction" that can cost real fundraising opportunities.

The question becomes: When should fundraising leaders invest energy in changing internal systems versus working around them? This requires what we might call "adaptive relationship navigation"—a sophisticated approach to reading organizational dynamics and making strategic decisions about when and how to engage with systemic change.

Adaptive Rules for Internal System Change Engagement

Drawing from natural adaptive systems like ant colony foraging algorithms and immune system learning, effective fundraising leaders develop decision-making frameworks that evolve based on experience and changing organizational conditions.

Initial Decision Framework: When facing systemic organizational problems, most fundraising professionals start with basic decision rules:

- **Authority Test**: Do I have decision-making power or strong advocates?
- **Pain Point Test**: Is leadership feeling the consequences of this broken system?
- **Timeline Test**: Can this be fixed quickly (30-60 days) versus working around it?
- **Political Capital Test**: How much influence will this consume, and do I have bigger battles ahead?
- **Alternative Methods Test**: Can I achieve the same outcome through workarounds?

Limitations of Static Approaches: These initial frameworks prove insufficient because they fail to account for growth in your influence over time, ignore context windows created by organizational crises or transitions, lack learning mechanisms for improving organizational navigation skills, treat each decision in isolation rather than recognizing compound effects, and oversimplify the dynamic nature of political capital and relationship building.

Adaptive Evolution: Sophisticated internal relationship navigation requires rules that learn and evolve:

Dynamic Authority Assessment: Your influence and organizational relationships change over time. What you couldn't change as a new hire might become achievable after building credibility. This requires quarterly assessment of your organizational influence level, relationship mapping to track which connections have strengthened, and recognition that during organizational transitions, normal authority patterns shift dramatically.

Pain Point Amplification: Rather than accepting that leadership doesn't feel systemic pain, skilled relationship navigators learn to make abstract consequences concrete through strategic use of metrics, stories, and timing. They recognize crisis moments as opportunities for previously impossible changes and develop better abilities to help leadership understand downstream effects.

Strategic Timeline Calculation: Experience teaches more accurate estimation of change timelines, recognition of which changes can be pursued simultaneously, understanding of seasonal organizational rhythms, and appreciation for how small system wins create momentum for larger transformations.

Political Capital Portfolio Management: Advanced practitioners learn to distinguish between influence that builds future capital versus influence that's simply consumed, track how quickly they can regenerate relationship capital after spending it, and recognize how successful system changes increase credibility for future attempts.

Creative Alternatives Innovation: Sophisticated relationship navigators continuously develop new workarounds while understanding how these sometimes evolve into permanent solutions, factor in the long-term sustainability of alternative approaches, and consider impacts on team morale and organizational health.

Learning Integration: The most effective fundraising leaders treat each internal relationship challenge as a learning opportunity, documenting outcomes, recognizing patterns across multiple experiences, and calibrating their approach based on accumulated wisdom. They understand that organizational dynamics are complex adaptive systems requiring sophisticated navigation skills that improve over time.

This adaptive approach to internal relationships transforms fundraising professionals from passive recipients of organizational constraints into strategic relationship architects who can read, influence, and optimize the internal systems that either enable or impede fundraising success.

B. Community Relationships

These connections multiply our reach exponentially. Peer organizations, civic leaders, faith communities, business networks—they serve as far more than referral sources. They become credibility validators. When a respected community leader speaks positively about your organization, that endorsement carries weight that no glossy brochure can match.

C. Vendor and Professional Service Relationships

Consider the web of relationships your organization maintains with attorneys, accountants, investment advisors, and even printers. Each of these professionals interacts with potential donors through their own practices. Major gifts often emerge from casual mentions by trusted advisors who believe in your work.

D. Beneficiary Relationships

The people your organization serves—clients, students, program participants—are your most powerful storytellers. Yet many organizations approach these relationships transactionally, treating beneficiaries as sources of content rather than as partners in the fundraising narrative.

While these human relationships form the visible foundation of fundraising, they represent only part of the ecosystem that drives sustainable success.

III. Systemic Relationships: The Hidden Infrastructure[2]

Here's where fundraising becomes truly sophisticated: recognizing that success depends not just on people connecting with people, but on how systems, processes, data, and timing interconnect throughout your organization. Systems theorists have shown us that nonprofit organizations function as open systems that must maintain themselves through complex exchanges with their environment, making these systemic relationships critical to organizational survival and effectiveness.

A. Data Relationships

Consider the relationship between your donor database, wealth screening tools, and program outcomes data. When these systems communicate effectively, you can identify the right prospects at the right time with the right ask. When they remain siloed, opportunities slip through the cracks.

B. Process Relationships

How does your prospect research process connect to your cultivation timeline? How does your stewardship workflow integrate with your renewal strategy? Organizations thrive when their gift processing system works in harmony with their donor communication workflow.

C. Timing Relationships

The relationship between annual fund timing and major gift solicitations often determines campaign success. How do board meetings align with campaign phases? When do grant deadlines intersect with donor cultivation cycles? These timing relationships, often overlooked, can make or break fundraising efforts.

D. Mission-Money Relationships

How does program delivery connect to funding streams? How does impact measurement translate into donor reporting? How does organizational capacity building align with revenue growth? These connections determine whether fundraising supports or undermines your mission.

E. Technology Relationships

The connections between your CRM, email platform, wealth screening, online giving portal, and accounting system often determine operational efficiency more than any individual donor relationship. When these systems work together seamlessly, fundraising becomes both more effective and more sustainable.

Understanding these systemic relationships becomes particularly important when we examine how organizations relate to one of their most valuable assets: the stories of impact.

IV. The Organization-Story Relationship: Beyond Beneficiary Anecdotes

Many organizations approach beneficiary stories as content to be extracted, polished, and deployed for fundraising purposes. This extractive relationship—where stories are gathered from beneficiaries and processed through institutional filters—creates a transactional dynamic that diminishes both authenticity and impact.

What if we reimagined this relationship? Instead of seeing stories as organizational assets to be managed, we could recognize that stories belong to the people who lived them. Our role becomes creating conditions where stories can be shared authentically, with beneficiaries as partners rather than subjects in the fundraising narrative.

Yet there's an even more fundamental question: while fundraisers often default to narrative as the primary way to connect people to mission, what about the power of unmediated observation? Consider the difference between reading a carefully crafted story about your program and witnessing it firsthand. Observation allows for authentic discovery rather than guided interpretation, personal meaning-making rather than institutional messaging, natural emotional responses rather than manufactured ones.

This suggests two complementary relationship approaches: the organization-narrative relationship and the organization-observation relationship. The first involves collaborative storytelling where beneficiaries retain agency over their narratives. The second involves creating conditions for direct witness—site visits, volunteer opportunities, immersive experiences—where people can connect organically with the work without narrative mediation.

When organizations shift from extraction to collaboration in their story relationships, something powerful happens: beneficiaries become genuine partners, narratives retain their complexity and authenticity, and donors encounter real voices rather than institutional messaging. When organizations also create opportunities for authentic observation, they offer an even more immediate form of connection that allows people to draw their own conclusions and form their own emotional bonds with the mission.

This collaborative approach ripples through other relationships—program staff begin supporting authentic storytelling rather than collecting marketing material, communications teams facilitate rather than manufacture narrative, and donors connect with genuine impact rather than processed content.

This interconnected nature of organizational relationships finds a compelling parallel in the natural world.

V. A Natural Metaphor: The Mycorrhizal Network (ˌmī-kə-ˈrī-zəl)

The forest ecosystem offers a compelling metaphor for understanding relationships in fundraising. Most people see trees as individual organisms competing for resources. But beneath the soil, fungal networks connect tree roots in vast communication and resource-sharing systems. The fungi trade nutrients with trees, trees share carbon with fungi, and information flows between distant trees about threats, seasonal changes, and resource availability.[14]

The forest thrives not because individual trees are extraordinarily strong, but because the invisible relationships between roots, fungi, soil chemistry, water cycles, and nutrient flows remain healthy and interconnected.

Fundraising organizations function similarly. While most people focus on donors as individual trees to cultivate, the real power lies in the mycorrhizal network—those invisible relationships between data systems, communication processes, stewardship workflows, timing cycles, and organizational capacity.

When your donor database communicates effectively with your program outcomes tracking, when your board governance process connects seamlessly to your major gift pipeline, when your impact measurement system feeds directly into your case development—that's your mycorrhizal network functioning optimally.

Organizations that focus exclusively on individual donor relationships while neglecting these systemic connections often struggle to scale their impact. They're essentially trying to grow a forest by tending individual trees while the underground network deteriorates.

The most successful fundraising operations, like the healthiest forests, invest as much energy in maintaining these invisible connective relationships as they do in nurturing the visible individual components.

This network metaphor becomes particularly relevant when we consider the ethical dimensions of fundraising relationships.

VI. Ethics and the Mycorrhizal Network

Just as toxins introduced into a forest's mycorrhizal network can poison an entire ecosystem, ethical compromises in any part of your organizational system can contaminate your fundraising operation.

When data relationships violate donor privacy, when process relationships manipulate donor psychology, when story relationships exploit beneficiaries for institutional messaging, or when mission-money relationships stretch truthfulness, the corruption spreads through the invisible network of organizational systems.

The Association of Fundraising Professionals' ethical principles, which I studied extensively while earning my CFRE, apply not only to face-to-face donor interactions, but to the integrity of every relationship within the fundraising ecosystem—from how databases connect to how impact measurement systems inform case development.[3] Ethical fundraising requires tending to the moral health of the entire mycorrhizal network, understanding that a compromise in one systemic relationship threatens the sustainability of all relationships, both visible and invisible.

So where does this broader understanding of relationships lead us as practitioners?

VII. The Path Forward

For me, as someone committed to advancing fundraising practice through both CFRE certification and deeper understanding, recognizing and nurturing these multiple relationship dimensions has become essential. The organizations that map, understand, and optimize all these relationships—not just the human ones—create the foundation for sustainable, scalable impact. Conversely, nonprofits that neglect these systemic relationships put themselves at a significant disadvantage, operating with an incomplete understanding of what drives fundraising success.

Ultimately, relationship building is organizational development work, not a procurement decision. The mycorrhizal network metaphor perfectly captures this—you can't buy a healthy underground ecosystem, you have to cultivate it over time by understanding how all the parts interconnect. Organizations that understand this systems perspective are less likely to get frustrated when the latest fundraising trend doesn't immediately transform their results.

This systems approach to relationships doesn't diminish the importance of personal connections with donors. Instead, it creates the infrastructure that makes those personal relationships more meaningful, more sustainable, and more likely to generate lasting philanthropic partnership.

VIII. The Underground Network Workshop Series

Six 45-Minute Team Sessions for Development Officers

Workshop 1: Mapping Your Current Relationship Ecosystem

"Making the Invisible Visible"

Understanding your organization's relationship ecosystem begins with recognizing that systems theorists have shown us nonprofit organizations function as open systems requiring complex exchanges with their environment. This mapping exercise makes visible the often invisible connections that drive fundraising success.

Opening (10 minutes)

- Brief review of mycorrhizal network concept
- Ground rule: No judgment, just discovery
- Materials: Large wall chart, sticky notes, markers

Activity 1: Relationship Inventory (20 minutes)

Step 1 (5 min): Individual brainstorm - each person lists all the relationships that affect their fundraising work

Step 2 (10 min): Team clustering - group similar relationships on the wall

Step 3 (5 min): Category identification - label clusters using the framework:

- Internal relationships
- Community relationships
- Vendor/professional relationships
- Beneficiary relationships
- Data relationships
- Process relationships
- Timing relationships
- Mission-money relationships
- Technology relationships

Activity 2: Connection Mapping (10 minutes)

- Draw lines between relationship clusters that interact
- Use different colors for: strong connections, weak connections, broken connections
- Circle the relationships that are "invisible" to most staff

Wrap-up & Assignment (5 minutes)

Key Question: "What surprised you about how many relationships actually affect our fundraising?"

Assignment: Each person observes one "invisible" relationship in action before next session

Workshop 2: Identifying Systemic Breakdowns

"Finding the Toxins in Your Network"

Just as toxins introduced into a forest's mycorrhizal network can poison an entire ecosystem, ethical compromises and operational breakdowns in any part of your organizational system can contaminate your fundraising operation.

Opening (5 minutes)

- Share observations from assignment
- Introduce concept: "systemic toxins" - where one broken relationship poisons others

Activity 1: Breakdown Detective Work (15 minutes)

Small groups examine common breakdown scenarios:

- Group 1: Data relationships (database doesn't talk to email system)
- Group 2: Process relationships (stewardship disconnected from cultivation)
- Group 3: Timing relationships (board decisions conflict with donor calendar)
- Group 4: Internal relationships (program staff vs. development tension)

Each group identifies:

- How does this breakdown start?
- What other relationships does it affect?
- What's the ultimate impact on fundraising?

Activity 2: Your Organization's Toxins (15 minutes)

- Return to your ecosystem map from Workshop 1
- Mark relationships that are "toxic" or broken
- Trace how each toxic relationship affects others
- Prioritize: Which toxic relationship is poisoning the most connections?

Planning Session (10 minutes)

Choose your workshop 3-6 focus: Based on your priority toxic relationships, which areas need attention?

- Workshop 3: Data relationship bridges
- Workshop 4: Process relationship optimization
- Workshop 5: Community relationship activation
- Workshop 6: Creating organizational "nutrient flow"

Workshop 3: Building Data Relationship Bridges

"Making Your Systems Talk to Each Other"

Opening (5 minutes) Quick check: What data relationships are currently broken or weak?

Activity 1: Data Flow Mapping (15 minutes)

Create a visual map:

- Draw boxes for each data system (CRM, email, accounting, program tracking, etc.)
- Draw arrows showing current data flow

- Mark "bridge points" where data should connect but doesn't
- Identify "data dead ends" where information stops flowing

Activity 2: Bridge Building Plan (20 minutes)

For each broken data relationship, answer:

- What information needs to flow between these systems?
- What's currently preventing this flow?
- What would be the simplest bridge to build?
- Who would need to be involved?
- What's the potential impact on fundraising effectiveness?

Prioritize bridges by:

- High impact + Low effort = Do first
- High impact + High effort = Plan carefully
- Low impact = Consider later

Assignment Planning (5 minutes)

30-Day Data Bridge Challenge:

- Each person commits to building one simple data bridge
- Schedule check-in meetings to troubleshoot obstacles
- Measure: What changes in fundraising effectiveness?

Workshop 4: Process Relationship Optimization

"Creating Smooth Nutrient Flow"

Opening (5 minutes) Review: How did your data bridge experiments go?

Activity 1: Process Chain Analysis (20 minutes)

Map your key fundraising processes:
Prospect identification → Research → Cultivation → Solicitation → Stewardship → Renewal

For each step, identify:

- Who's involved?
- What information is needed?

- What gets passed to the next step?

Mark "handoff points" where process relationships can break down
Circle "bottlenecks" where the flow slows or stops

Activity 2: Optimization Opportunities (15 minutes)

Focus on three process relationship improvements:

1. **Smoothest Handoff**: Which process handoff works best? How can you replicate this elsewhere?
2. **Biggest Bottleneck**: Which process relationship creates the most delays? What's one change that would improve flow?
3. **Missing Link**: Where is information or momentum getting lost between processes? How could you create a bridge?

Implementation Planning (5 minutes)

- Choose one process relationship to optimize
- Define success: How will you know it's working better?
- Set timeline: What's achievable in 30 days?

Workshop 5: Community Relationship Activation

"Expanding Your Network Reach"

Understanding that community relationships serve as credibility validators and exponential reach multipliers, this workshop focuses on activating dormant connections and strengthening existing ones.

Opening (5 minutes) Check-in: How are your process optimizations working?

Activity 1: Community Ecosystem Mapping (15 minutes)

Create concentric circles around your organization:

- **Inner circle**: Current community relationships (peer nonprofits, civic leaders, etc.)
- **Middle circle**: Potential community relationships (untapped connections)
- **Outer circle**: "Mother trees" (established organizations that could mentor/support you)

For each relationship, note:

- How does this relationship currently help fundraising?
- What potential exists that we're not using?
- How could we strengthen this connection?

Activity 2: Activation Strategy (20 minutes)

Choose three community relationship strategies:

1. **Credibility Validator Cultivation**: Which respected community leader could authentically endorse your work? How do you deepen that relationship?
2. **Peer Organization Partnership**: What organization serves a different population but shares similar values? How could you create mutual support?
3. **Professional Network Leverage**: Which vendors/advisors interact with your potential donors? How do you activate those connections?

Action Planning (5 minutes)

- Pick one community relationship to activate this month
- Define specific outreach actions
- Plan how to measure relationship strength improvement

Workshop 6: Creating Your Organizational "Nutrient Flow"

"Designing a Healthy Ecosystem"

Opening (5 minutes) Final check-in: What's working better after implementing changes from previous workshops?

Activity 1: Ecosystem Health Assessment (15 minutes)

Rate your relationship ecosystem health (1-5 scale):

- **Internal relationships**: Trust, communication, shared goals
- **Community relationships**: Mutual support, credibility validation
- **Systemic relationships**: Data flow, process integration, timing coordination
- **Story relationships**: Authentic collaboration vs. extraction
- **Ethical relationships**: Integrity throughout the network

Identify your:

- Strongest relationship areas (your "mother trees")
- Growth areas needing attention
- Potential "toxic" relationships to address

Activity 2: Sustainable Ecosystem Design (20 minutes)

Create your 6-month relationship development plan:

1. **Maintenance**: Which strong relationships need ongoing nurturing?
2. **Growth**: Which relationship areas need development investment?
3. **Integration**: How will you ensure different relationship types support each other?
4. **Monitoring**: How will you track relationship ecosystem health?

Design your "nutrient flow":

- How does information flow through your relationships?
- How do different relationships feed and strengthen each other?
- Where do you need to invest energy to keep the ecosystem healthy?

Commitment & Accountability (5 minutes)

- Each person commits to one relationship ecosystem improvement
- Schedule quarterly "ecosystem health checks"
- Plan how to share learnings with broader organization

IX. Series Wrap-Up: Implementation Resources

Monthly Check-In Template

- What relationship improvements are working?
- Where are new breakdowns appearing?
- What needs adjustment in our ecosystem?

Relationship ROI Tracking

- Time saved through better process relationships
- Opportunities identified through stronger community relationships
- Increased donor engagement through improved data relationships

Troubleshooting Guide

- When relationships break down: How to diagnose and repair
- When staff resist systems thinking: How to demonstrate value
- When leadership needs convincing: How to show relationship ROI

X. Definition of Relationship (in fundraising context)

The dynamic connection or interaction between any two or more elements within a fundraising ecosystem, including but not limited to: person-to-person connections, data-to-process integrations, timing-dependent workflows, technology system interfaces, organizational capacity alignments, and mission-delivery mechanisms. These relationships create the infrastructure through which resources, information, and influence flow to achieve philanthropic outcomes. Effective fundraising requires managing the health and optimization of all relationship types, not merely interpersonal donor connections.

XI. Citations and Endnotes

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