

Visit a Donor, Not an ATM

By Stephanie Roth



TWO YEARS AGO, AFTER WORKING AS A CONSULTANT for many years, I took an interim job as a major gifts officer for a reproductive justice organization. I felt strongly about the cause and also wanted to see what it was like to build a major gifts program in an organization that had major donors but not a well-developed program or plan for it. While I was only in the position for 10 months, I experienced the work from a different perspective that gave me new insights into what it really means to build meaningful relationships with donors.

One thing that actually surprised me was how much I enjoyed the work. I often found myself wondering, “Why do people say they hate fundraising so much, when at its best it’s about spending time with people who share a passion for a cause, having interesting conversations with them (most of the time), and talking about how we can come together to make a difference in the world?” Of course I understand it’s not always so much fun, donors can be difficult, getting meetings is often challenging, it’s stressful having to meet a budget, and our organizations never feel we have enough

money to do the work. But when you look at the outpouring of support for progressive organizations that happened after the election last year, you know that people really want to do something to make a difference and giving money is one thing they can do.

What I want to share in this article is about how to shift the focus of your fundraising from YOUR needs and YOUR schedule and YOUR activities to what resonates with and compels your community (including donors) to take action. The way this translated into my specific job as a major gifts officer was to get to know our donors on their terms, and at times other than when I wanted to ask them for money.

Many of my clients (and readers of the *Grassroots Fundraising Journal*) raise a high percentage of their funds from individual donors in the last three months of the year. There has been an unfortunate trend over the past few decades of concentrating solicitations at the end of the calendar year. This also means squeezing your efforts to speak with and sometimes meet with donors in a very short time frame, often from Thanksgiving through year-end.

The rationale for this is that it's the end of the tax year and the best time for people to figure out how much money they've earned that year and how much they can afford to give.

The problems for nonprofits trying to raise lots of money at the end of the year include:

1. They're competing with the other 1.5 million organizations in the country trying to raise money at the same time;
2. Year-end is a hectic time for everyone, including families with children on school vacation, people hosting and attending holiday parties, etc.;
3. The proverbial putting all of your eggs in one basket so that if something goes wrong (your development director leaves or gets sick or any number of things that can happen), you take a much bigger hit in your fundraising results; and,
4. Over 70 percent of Americans file a short form and receive no tax benefits from their giving so year-end is not meaningful to them from a tax point of view.

Even if this article does not lead you or your organization to change your fundraising calendar to spread out your fundraising throughout the year (and of course it can be difficult to do if your donors are so used to giving at year-end that they won't follow your efforts to change that), you can change up the timing of your efforts to meet with donors. In fact, in my experience, it can be easier and less anxiety producing to meet with donors when you're NOT asking them for a gift.

To help you plan for such a meeting, the following breaks down the parts of the meeting into a beginning, middle and end. There is no absolute formula for these phases, but this can give you some framework for planning that can lessen any anxiety you might have if you have no or very limited experience meeting with donors face-to-face.

Opening:

- Introduce yourself (unless you already know each other) and thank them for taking the time to meet.
- Settle in—ask how they're doing, if in a restaurant, order food or drink, making sure not to order anything that is super messy to eat.
- Explain the purpose of your meeting: "I'm so glad to have a chance to meet with you in person. As I explained in my email (or on the phone), we're trying to meet with as many donors as we can this spring to get to know you all better and gain a deeper understanding of why this work is important to you." If this is a meeting to introduce a new project or campaign that you'll be wanting to solicit their support

for later on, you can say something like, "As you know, I'd like to speak with you about this exciting new campaign we're launching and see what questions you have and also gauge your interest in being part of it."

- OR start with a question, for example, "Before I tell you more about the campaign, I wanted to ask you what you already know about us, and what most interests you about our work."

Middle:

- This should be the most fun and engaging part of any meeting. Think of it as an opportunity to have an interesting conversation about the issues you're working on and what the organization is trying to accomplish. It's also a very important opportunity to get a sense of the person you're meeting with and what they think, appreciate and/or have questions about. Think of questions to ask the donor, many of whom (especially older or long-term ones) will have a long history of supporting and/or working on the issues you address in your work.
- Come prepared with the main points you want to make about the organization or a specific project or campaign. What do potential donors need to know? But also be prepared to focus on specific things the donor may want to know—not every donor is interested in the same things.
- This section of the meeting or call is the most organic. That is, it should flow from what interests or questions the donor has or the questions you ask of them. If they are not very forthcoming, you can always ask them what's most important to them in deciding to get involved with an organization, whether as a donor, a volunteer, or in some cases a board member. And if things lag a bit after that, you can ask if they have any additional questions for you. Then move to the close.
- Ideally there's something you'd like to get donors' opinions on, and you can say, "We're considering moving in this new direction and feel it would be helpful to get some advice/input/ideas from those who are closest to the organization and care most about it."

Close:

- This is the time to clarify next steps. If the meeting is purely a get to know each other opportunity or a time to thank and appreciate them for their past support, you can end the meeting by thanking them again for taking the time to meet, for any ideas they shared that you found particularly useful, etc. You can say something about being in touch

with them over the course of the year, and hoping they'll continue to support the work.

- Ideally you'll get an agreement from them to consider a specific request for support down the road. Some ways to phrase it (but use your own words) include, "I'd like to follow up with you over the next few weeks to see if you have any additional questions about the campaign"; and/or, "Depending on what stage the construction is in, we'll be scheduling visits to the new space for donors and potential donors, and I'll let you know when those are happening"; and/or, "Once you've had a chance to look over the materials (and whatever else they indicate they need to do, e.g., talk with their partner), can I follow up with you to talk about a possible gift for this project?"

After they respond (whatever they say), thank them for their past support (if they've given before) and/or for taking the time to speak with you. Even if they say no to considering a gift to the campaign, thank them for their time and whatever feedback they've given you.

After the Meeting or Call:

- Write up any notes so you can keep track of anything you learn about the donor in your database.
- If there's anything they asked you that you said you'd have to find out and get back to them, make sure to do that.
- Send a thank you email as soon as possible, and include any next steps you agreed to.

The approach I've described above works best if you have a genuine interest in getting to know your donors better, believe they have something to offer the cause beyond their financial support, and enjoy having conversations about the issues you both care about. And by spreading out your efforts to meet with donors throughout the year, and not necessarily only at times when you're asking for money, you'll not only enjoy the time you spend with donors more, but will also have more success in raising money. ■

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