

PRODUCTIVE CONVERSATIONS WITH DONORS:

**A HANDBOOK
FOR FRONTLINE FUNDRAISERS**

SECOND EDITION

KATHY DRUCQUER DUFF, CFRE

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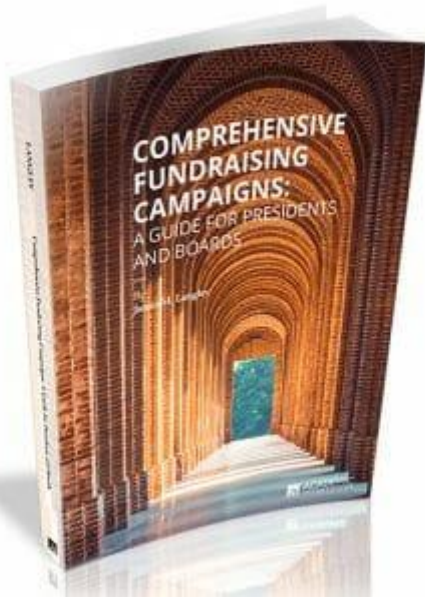
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PRODUCTIVE CONVERSATIONS WITH DONORS

FOREWORD

Why you need this book and what you'll learn from it

As fundraisers, we have many responsibilities that, when allowed, will get in the way of our primary function: building authentic relationships with an aim of enhancing philanthropic support for our organization.

When staff members walk into my office and share that they are experiencing a lack of enthusiasm for our work, are burned out, or are getting caught up in the smaller details of their jobs, I always ask the same question: “When was the last time you were on a donor visit?” The answer I receive usually lists out all of the other things that they have on their desks. The most important role that we provide our institutions is to build relationships on behalf of our organizations and to move those relationships to a philanthropic gift.

When we are inspired by our philanthropic partners, that inspiration allows us to be the very best in our roles. Being in the field, visiting with our donors and prospects, and listening to the ways individuals want to make a difference for our organizations is the best pick-me-up we can find (and that is a critical element for being a high performing gift officer). I have yet to meet a committed fundraiser who does not enjoy time with our organization’s friends and prospects. Building, growing, and enhancing

relationships that lead to philanthropic giving is our highest-priority work and the greatest contribution we make to our institutions.

To truly be high performing, we need to not just cultivate and solicit but to strengthen the relationships between our prospects and donors and our institutions. This requires discipline and focus.

Yet, this discipline is often lacking. We as fundraisers talk about over-cultivating or under-qualifying, and we wonder what else we can do to prepare a prospect for an ask. In this book, I will challenge us and suggest that perhaps it is not about under-qualifying or over-cultivating, but rather about not making the very best use of our time with our prospects and donors. Often, we think donor meetings are about being “nice,” but we are not in the business of building “nice” relationships. We are responsible for building meaningful relationships and for moving those relationships towards transformative, impactful, or participatory philanthropy.

Simply visiting with someone is not enough.

TIP

When thinking about a donor strategy, ask yourself, “What do I need to know to move this relationship to an ask?”

How probing questions make us better at what we do

Some of the greatest tools we have for building authentic relationships are storytelling and the use of probing questions that will simultaneously inspire our donors and educate us. A few good questions, such as "How did you learn to be generous?" or "Is giving something that is important to you and your family?" can reveal a roadmap for moving forward. That can ultimately result in a lifetime of giving. The use of a few deliberate questions takes what would have been a "nice" meeting and creates in its place an encounter that allows us to build a meaningful and engaging strategy so that we can give our donors the vehicle to enhance, inspire, and transform our organizations. These probing questions allow us to be more accountable and more purposeful in our roles.

Often, a core part of these conversations involves educating individuals who are new to giving about how their support *is philanthropy*—and that gifts of every shape and size make a difference. Many think that philanthropists are only those about whom they read in the paper, the ones who make multi-million dollar gifts. Philanthropists are more than the dollar amount given; philanthropists are change agents, cheerleaders, visionaries, or champions for our organizations. They are people who care deeply about the causes they support and intentionally choose the organizations they see as the best vehicles for fulfilling their passions.

Talented development officers understand that we not only provide prospects the opportunity to be donors but we also provide the vehicles to turn their passions into

inspiration. Through the use of probing questions, we learn about our prospects' views on charitable giving, their definition of philanthropy, and where in their lives they learned to be philanthropic. This is important to know, as generations, cultures, genders, geographic areas, etc. tend to give differently. Understanding the different motivations (both generationally/culturally and values-based) allows you to find the right match for the donor and the institution.

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As philanthropy continues to evolve, donors will continue to be more direct about the impact they want their gifts to have and the way they hope their giving will be valued. We have an opportunity to share with them that their participation is deeply valued and that their loyalty and support transform our mission and our programs. We are in the role of creating philanthropic champions, and that is a role that gives to both the donor and the institutions that we serve.

Many studies have found that advancement professionals who are curious are often our highest performing gift officers. The ability to ask questions in an authentic way, listen for cues, and then add additional questions to the conversation allows us to identify the beliefs, desires, and dreams of our prospects. With this knowledge, you can

determine fit, build strategy, and find that match between your institution's vision and your donors' desire to make a difference. But it is not just about being curious; you have to be inquisitive in a way that is also organic and genuine. Asking questions for the sake of asking questions is off-putting to those we meet with and a sloppy, unprepared approach to advancement work. Building a relationship that is built on trust and shared goals is critical in the work that we do. Ensure that those you meet with know that you will be asking questions as you build a relationship with them. Thoughtful, probing questions can result in incredible insight, but a prospect must be prepared for them first. Share that you're going to be asking questions and why.

This book will give you new tools to support curiosity and inquisitiveness, as well as build upon self-confidence. This book will also provide new approaches for being persistent in an authentic manner. Each of the chapters ahead will provide a primer on how to ask probing questions to make the most of various donor visits and scenarios.