
PRODUCTIVE CONVERSATIONS WITH DONORS: A HANDBOOK FOR FRONTLINE FUNDRAISERS

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By

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Built upon a passion for the impact of philanthropy and the relationships that make it possible, Kathy Drucquer Duff's 23 plus year advancement career underlies the expertise she provides to clients. Kathy is an executive advancement officer who has led teams in building transformative strategies: strategies that allow staff and colleagues to transform through growth, purpose and commitment, and strategies that allow donors to transform themselves and their passions through giving.

Kathy is helping non-profits and institutions transform the way they practice philanthropy to secure their success in the long term. She provides this expertise from her experience in developing fundraising plans that have secured gifts of up to 9 figures, and in building strategic talent management models that can be used by organizations of all sizes and operating budgets.

Kathy's "grow your own" fundraiser model was developed during the economic downturn of the 2000s when limited budgets did not allow for the robust hiring of new development staff. Instead, Kathy built a structured talent management program that maximized existing resources, inspired loyalty, and generated fundraising results. This approach has led to comprehensive programs in donor pipeline development, talent acquisition, new-hire onboarding, individualized retention, and in-house professional development.

Kathy has developed her breadth and depth of expertise at large, sophisticated institutions:

Served as Associate Vice Chancellor of University Development at University of California San Diego (UCSD); led a team accountable for an annual goal of over \$70 million.

Served as Vice President of Philanthropy for the Sharp HealthCare Foundation; designed and implemented a system-wide campaign approach and team structure for the Inspire campaign.

Served as Associate Vice President of University Relations and Development for San Diego State University; led fundraising for the L. Robert Payne School of Hospitality and Tourism Management, including securing its naming gift; co-created an interdisciplinary fundraising plan for the university's first \$500 million comprehensive campaign.

Kathy is a sought-after consultant and speaker for industry associations including CASE and ADRP. She teaches a variety of fundraising essentials courses and webinars for Academic Impressions.

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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 usually lists all of the other things that they have on their desks. And yet, I know that 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 in 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 closer to an ask?

Our institutions have charged us with a role that creates one of the best returns on financial investments for our organization. When we do our jobs right, we assist in building and earning trust that can lead to lifelong partnerships for our institutions.

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, and that can ultimately result in a lifetime of giving. The use of a few deliberate questions takes what would have been just 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 the organizations with which we work. 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 tend to give differently. Understanding the different motivations (both generationally 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 giver and the institutions that we serve.

We know that people who are curious are some of the highest performing gift officers. The ability to ask questions in an authentic way, listen for cues, and then add additional questions to the conversation allow 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. Building a relationship that is built on trust and shared goals is critical in the work that we do.

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

Are you moving the relationship forward with every donor interaction?

Simply visiting with a donor is not enough. This book gives frontline fundraisers new tools to have more productive conversations. Learn how to use probing questions to:

- Thank a consistent donor
- Engage new prospects or “never donors”
- Engage young alumni
- Re-engage lapsed donors
- Discover what motivates the “sometimes donor”
- Expand your network of connections

Included are specific strategies for guiding donor conversations to inspire major gifts, planned gifts, and gifts from parents.

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Each year we serve thousands of colleges and universities through professional development, research, and publications. AI is not a policy organization. We foster innovation and focus on what can be done today. We address, head-on, the unique and difficult challenges higher education faces.