

Donor Relationship Skills

American Dental Association Foundation
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Task: Technical Skills

Relationships: People Skills

Primary Reasons People Don't Succeed in Leadership/Major Gifts Development

- Lack of understanding of process**
- Lack of information about prospects/donors**
- Lack of focus**
- Uncomfortable asking**
- Inability to move outside self-imposed restrictions**
- Inadequate commitment to cause**
- Not asking**

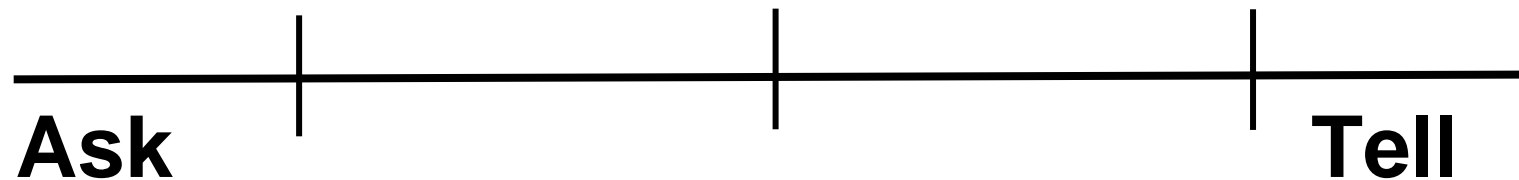
Principles of Interpersonal Communication

- We cannot not communicate
- Communication is irreversible
- Effectiveness in communication can be learned

Communication Styles/Principles of Behavior

- We are creatures of habit
- We are judgmental
- We look at behavior
- Behavior is measurable
- Behavior is neither good nor bad; rather it is appropriate or inappropriate
- Behavior can be adapted/changed

Assertiveness

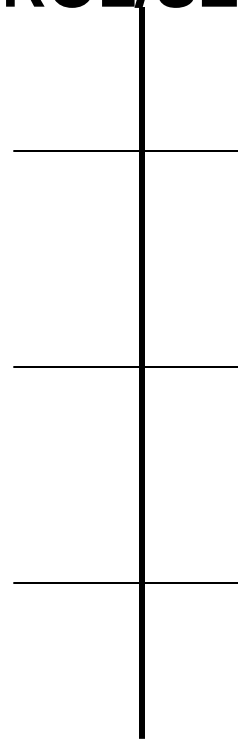


Perceived degree of effort

To influence another's thoughts and/or actions

Responsiveness

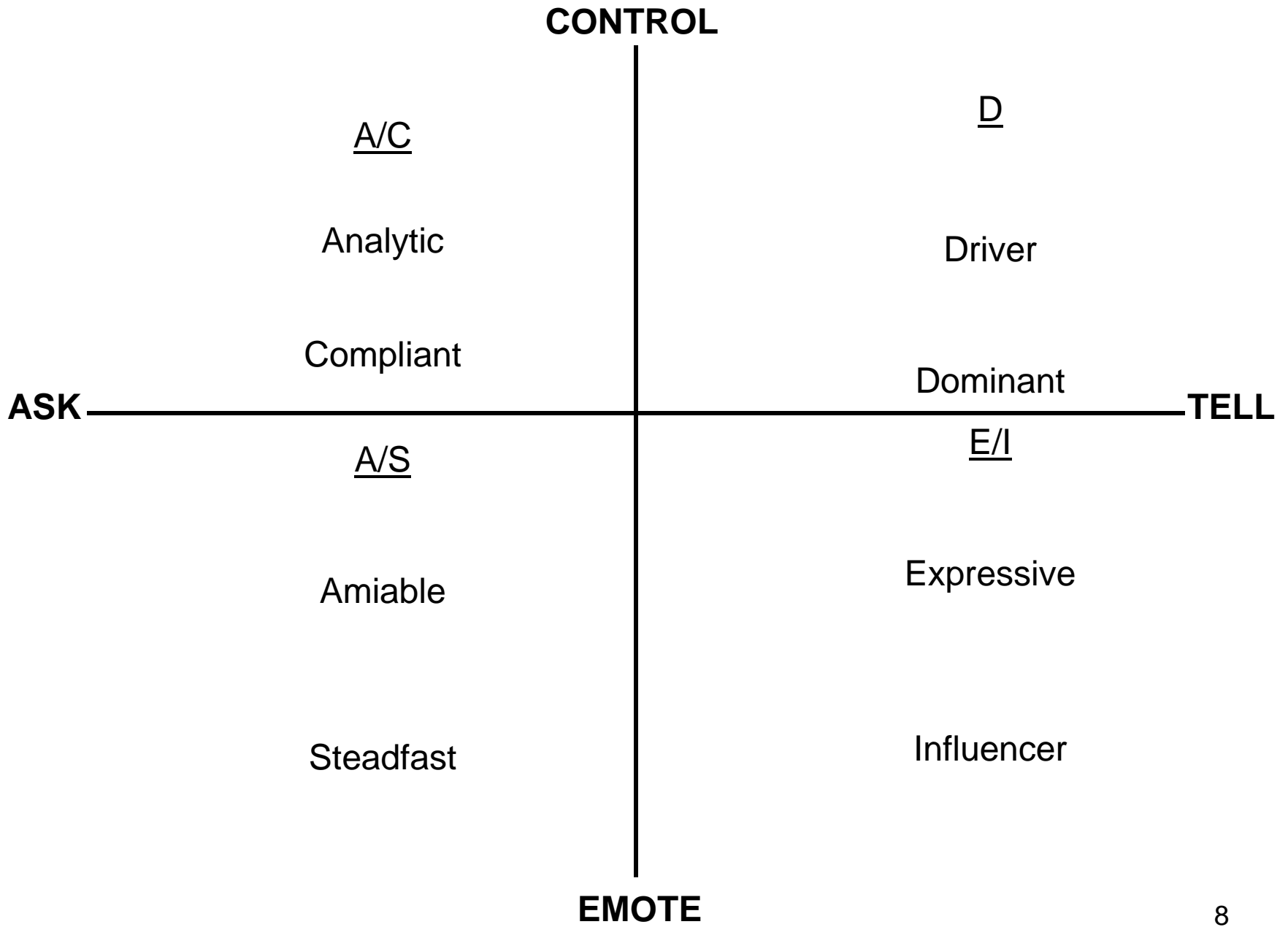
CONTROL/SELECTIVE



Emote/Demonstrate

Perceived degree of effort

To show reactions, emotions, feelings



ANALYTICAL/COMPLIANT

- Dry Humor
- Poker Face
- Serious
- Ask: Facts, Details
- Task-Oriented
- Monotone
- "Right"

DRIVER DOMINANT

- Blunt Humor
- Serious, Intense
- Urgency
- Tell
- Risk-Takers
- Limited Body Language
- Task- Oriented
- Loud
- "Win"

AMIABLE/STEADFAST

- Safe Humor
- Highly Responsive Face
- Ask-oriented
- Minimize Risk
- Flowing Body Language
- People Oriented
- Soft Voice
- "Loved or Approved"

EXPRESSIVE/INFLUENCER

- Slapstick
- Reactionary Face
- Tell Oriented
- Risk Takers
- Exaggeration
- People Oriented
- "Comfortable"

“Quick Read” of Styles

Is this person’s behavior more

Outgoing/Direct

- Fast pace
- Telling
- Louder speech

OR

Reserved/Indirect

- Slow pace
- Asking
- Softer speech

❑ Competitive and Directing

- “Closed”
- Unexpressive face
- Formal
- Focus on “What”
- Priority: goal/result

❑ Accepting and Doing

- “Open”
- Relaxed face
- Casual
- Focus on “How”
- Priority: cooperation

□ Talkative and Interactive

- “Open”
- Animated face
- Feeling
- Casual
- Focus on “Who”
- Priority: people and approval

□ Assessing and Thinking

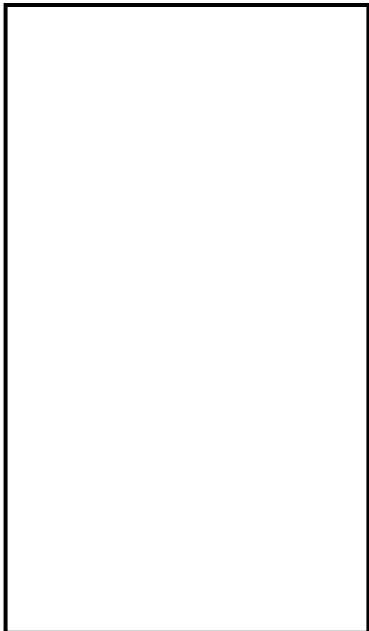
- “Closed”
- Unexpressive face
- “Thinking”
- Formal
- Focus on “Why”
- Priority: quality and analysis

Exercise

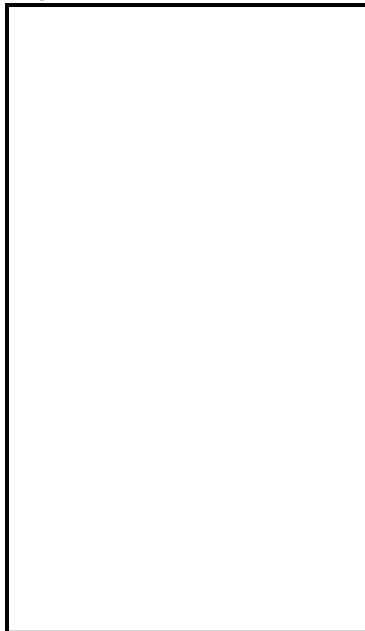
Develop a “donor” profile for each of the behavior types answering the questions:

- What does he/she want to hear?
- How does he/she want to hear it?
- How much time will you get?
- What will be a turn off?

D



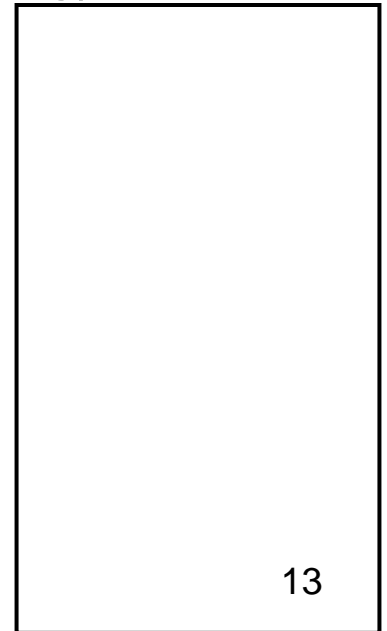
I/E



S/Ami



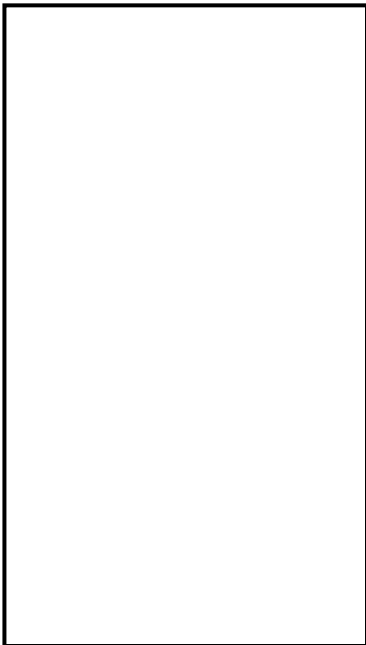
C/A



Develop a “successful fundraiser” profile for each of the behavior types, answering the questions:

- What strengths will this fundraiser bring to the relationship?
- What will this fundraiser need to watch out for (personal behaviors)?

D



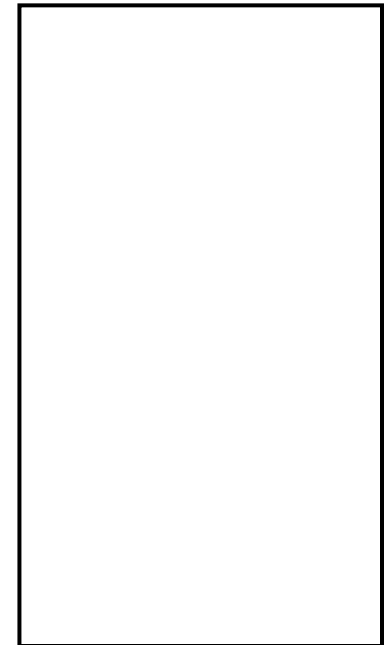
I/E



S/Ami



C/A



Nonverbal Communication

Appearance: clothing

Eyes: eye contact ?

Touch: use freely, sparingly, not at all

Space: respects personal space or not

Time: uses or wastes

Donor Relationship Skills

Relating: building trust

Discovering: understanding needs, wants, motives

Advocating: matching donors' wants, needs, desires, philanthropic goals to ADAF goals, objectives, outcomes, impact

Supporting: ensuring satisfaction, fulfillment, gratitude

Relating

□ Recognize Level of Trust

– Establish credibility

- Propriety (dress, manners, language)
- Competence (experience, expertise)
- Commonality (beliefs, attitudes, values, professional relationship)
- Intent (purpose, process, pay off)

□ Empathy

- People give to ADAF not so much because they understand our organization, but more because....

Discovering

- Recognize Donor's "No Need"
- Discern motives for participating
- Questioning and Listening Skills
- Ask permission to ask questions

Fact –finding ?'s

Task

Personal

? > answer

Who, what, where,

When, “are you...”

Feeling-finding ?'s

Task

Personal

? < answer

Feel, think, prefer, wish

?’S > information

?’S raise fever to
participate

Task - justification

(back wheel)

Personal - motivation

(front wheel)

Advocating

- ❑ Recognize “No Help”
- ❑ Develop Task and Personal Appeals
- ❑ Delivery Skills

How donor satisfies dreams, aspirations by giving to ADAF

Benefits

- belonging
- accomplishment
- respect
- approval
- power
- recognition

Feelings

- pride
- validation
- esteem
- legacy
- warmth
- worth

Supporting

- Recognize “No Satisfaction”
- Enhance The Relationship
- Reinforce The Decision
 - Solution
 - Advantage
 - Benefit

Characteristics of Major Gift Prospects

- Aware
- Interested
- Involved
- Concerned
- Committed
- Capable
- Accessible
- Experienced
- Seeking fulfillment

What the Prospect Looks For

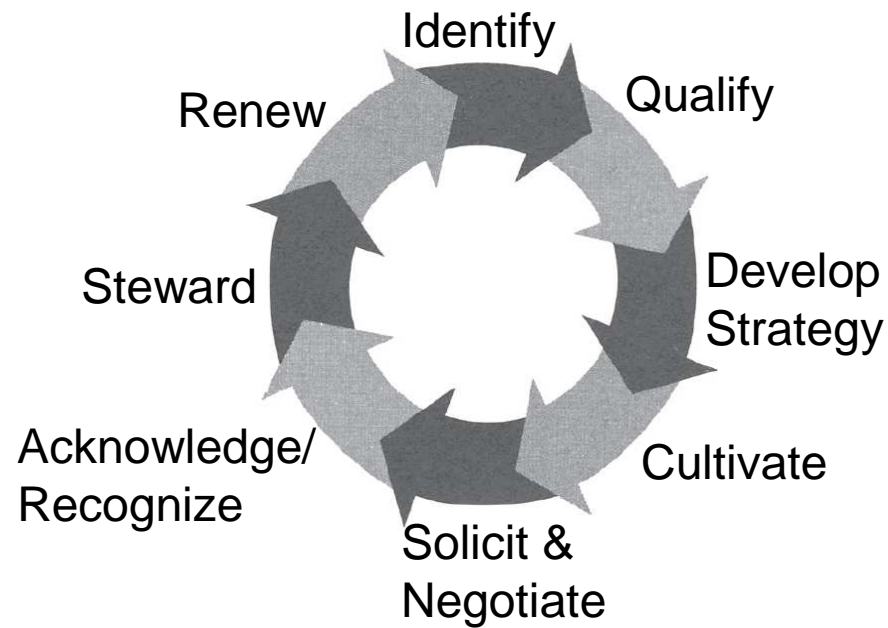
- Evidence of good management
- Evidence of reasonable planning
- Evidence of prior support
- Persuasive presentation by credible volunteers
- Absence of pressure
- Invitation to share/join

Determinants of Charitable Giving

- **Communities of participation**
Association
- **Frameworks of consciousness**
Identification with cause
- **Invitation to participate**
Asked to give
- **Discretionary resources**
Accepted capacity
- **Models/experiences from youth**
Positive examples
- **Urgency and effectiveness**
Philanthropy meeting needs
- **Demographic characteristics**
Circumstances affecting giving
- **Intrinsic and extrinsic rewards**
Positive outcomes

Material adapted from research by Paul G. Schervish.
For further explanation see www.bc.edu/research/swri.

Major Gifts 8-Step Cycle



Donor Relationship Process

A. Initial Meeting – Social, Exploratory

Thank for current/previous gifts

Explore involvement with ADAF

Learn about other interests/concerns in addition to ADAF (bring out beliefs, values)

Observe surroundings clues of interests

Ask for follow-up to discuss financial support

B. Follow-up – Begin discussion of financial support

Review initial conversation/meeting

Recognize current/previous support

Present “Big Need”/How to meet programs, services of ADAF to address community needs

Gauge reaction, next steps build on points of shared interests

Set date to visit again

Donor Relationship Process

(Continued)

C. Focus on gift support

Review last meeting emphasize shared interests/values

ADAF's impact on solving pressing problems

Role of financial support in giving ADAF resources needed to meet needs

Ask for questions, concerns

Ask for commitment/proposal consideration ask for a gift/submit proposal

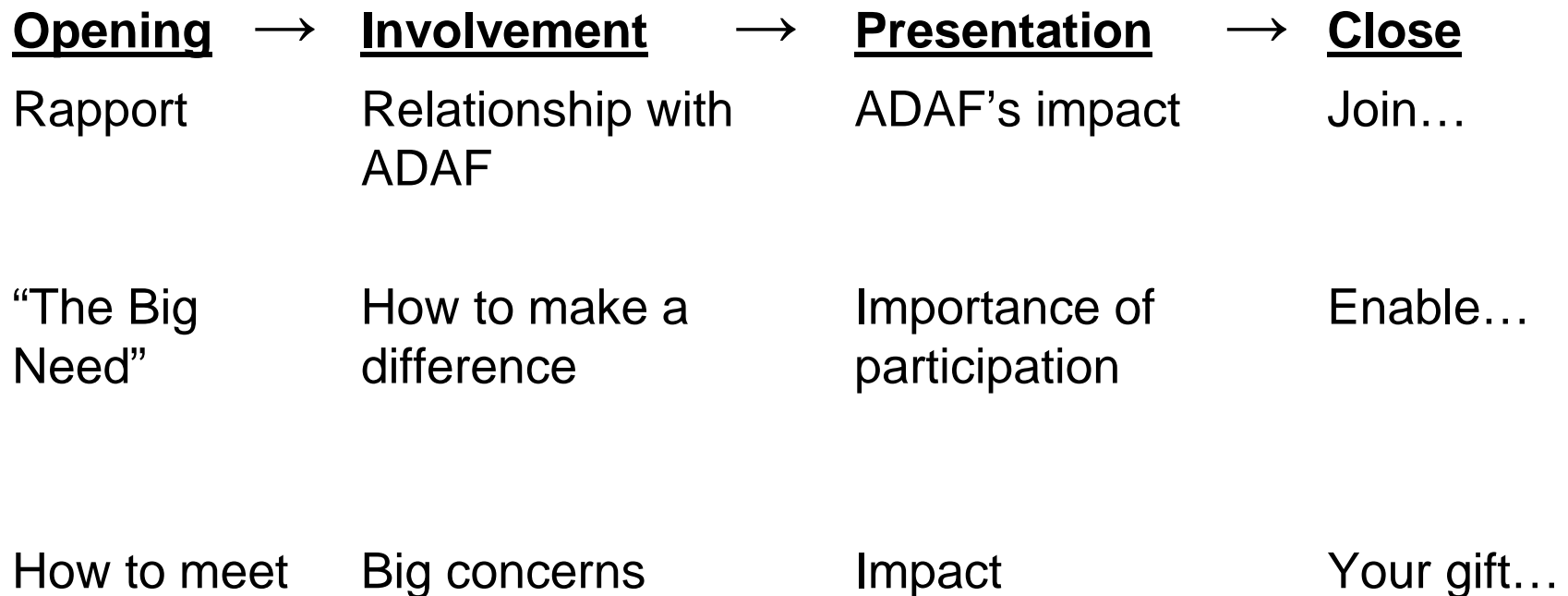
D. Formal Conclusion

Review Need/Problem: Service/Solution

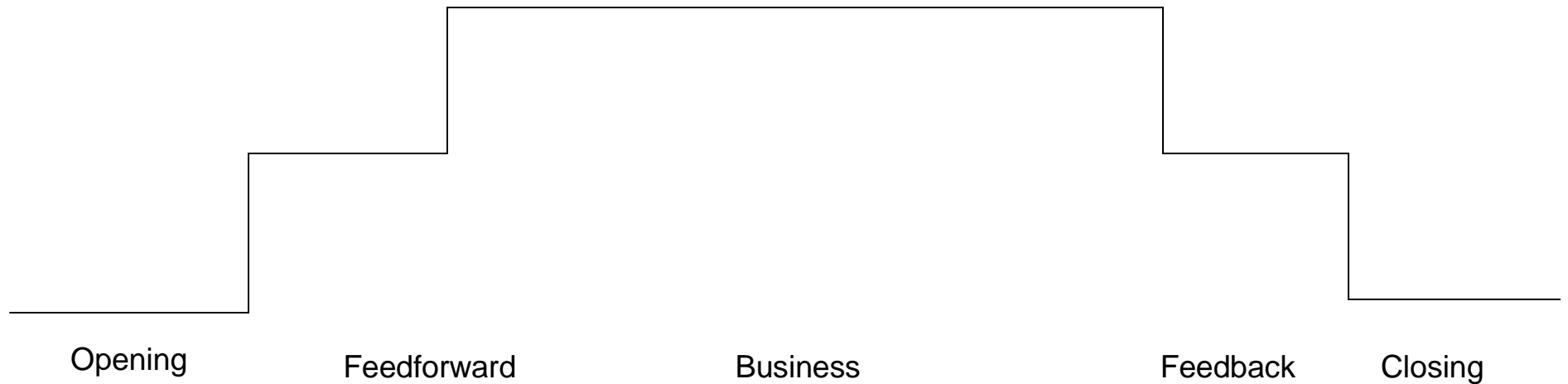
Discuss proposal/complete gift

Next steps?

The Conversation about Giving to ADAAF



THE CONVERSATIONAL PROCESS



Source: Devito, Joseph A. The Interpersonal Communication Book, Eighth Edition. New York: Addison Wesley, 1998

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