



Conversation, not Presentation: Get your donors talking and raise more money!

June 27, 2024

Presenter:

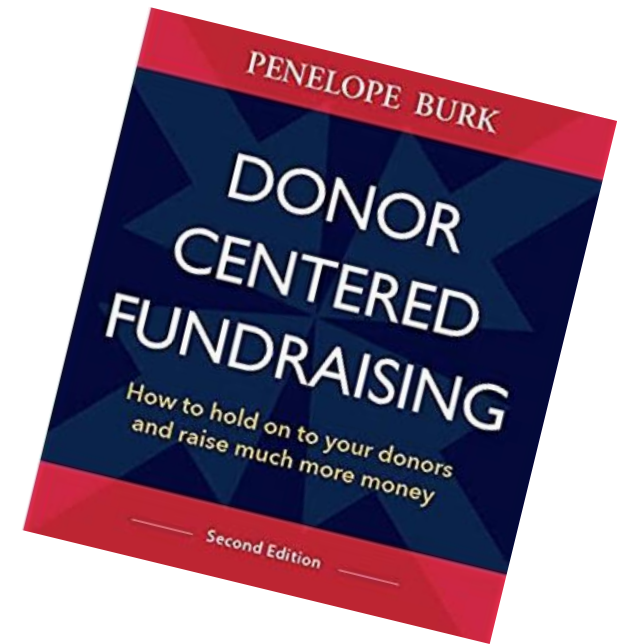
Diane G. Remin, President
diane@majordonors.com
617.596.6086 (direct)

Today's Agenda

- ◆ Introduction: What donors want and why people give
- ◆ Fundraising reframe
- ◆ The Donor Conversation Driver
 - The concept/why it works
 - The model/template
 - Funding priorities with exercise
 - Funding Plan
 - Flip side
- ◆ Questions are the key to conversation (via role play)
- ◆ Appendix: Getting started and the conversation transitions

What donors want

1. To be part of a big idea/vision that is important to them
2. To know what you are doing with their \$--and that you did it before you asked again
3. To be thanked promptly and personally



Why people give



Individual donors give based on emotion. (They may justify with logic and/or make certain you will be a good steward of their gift.)

Language implications:

- Stories, **not numbers**
- "Word pictures," **not jargon**, e.g., "We want every child to be able to read, write and be successful," not "education reform."

Whose story?



How does **the donor's story** entwine with your organization's mission/vision?

Fundraising reframe



An “ask” is not a painful extraction of funds.



An “ask” is a gift: You are giving the donor the **opportunity** to make something happen that matters to them—the place that the donor’s story intersects with your work.

Donor Conversation Driver

Meet donors where they are during in-person or Zoom visits that, with permission, conclude with an opportunity to invest (aka an “ask”)

Acknowledgement and gratitude to [forimpact.org/The Suddes Group](https://forimpact.org/) for creating the Donor Engagement Tool on which the Conversation Driver is based.

Donor Conversation Driver: What is it?

Section 1

Section 2

Section 3

- An over-sized one-page, three-part **visual framework** that makes it easy to:
 - **Engage** the donor
 - Take a **permission-based** approach to the conversation

It's a “**living document**” that is flexible and customizable.

Donor Conversation Driver

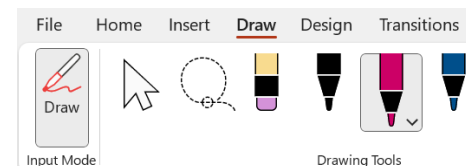
In-person

- ◆ 18x24 sheet of paper folded in thirds (11x17 minimum)
- ◆ Bring markers and sit adjacent/next to your donor if possible
- ◆ Encourage:
 - Scribbling important words
 - Circling important points
- ◆ Bring extra copies



Zoom

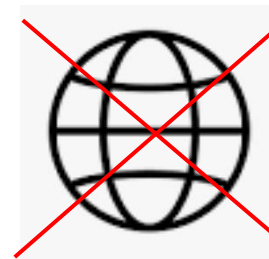
- ◆ 3 slides for the front and 2-3 for the back OR
- ◆ One over-sized document—designed so you can “reveal” one section at a time
- ◆ PDF for post-Zoom visit email
- ◆ Once you are comfortable presenting on Zoom:




The Donor Conversation Driver serves one purpose

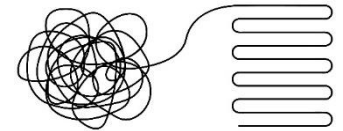
It is not:

- A brochure
- A mailer
- A flyer
- A website page



Why it works: An “interactive case”

- ◆ A **conceptual framework** for a successful donor visit
- ◆ Answers three key donor questions
 1. **WHY** do you exist? To **solve what problem**/make what change?
 2. **WHERE** does my money go? \$  **Specific impact**
 3. **HOW** can I help? It puts the funding plan in front of the donor.
- ◆ What will it take to achieve success?
 - A credible plan that shows how the program/project will be funded—do the math!
 - Specific gift impact examples. ***For example, your gift of \$25K will...***
- ◆ It is flexible/customizable



Goal:
\$250,000/yr.
1 @ \$50,000
4 @ \$25,000
6 @ \$10,000
8 @ \$5,000
Gifts of all sizes welcome.

BOSTON AREA GLEANERS

FROM FARMS TO FAMILIES



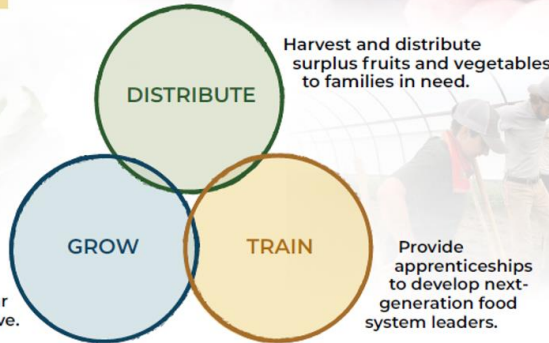
GLEANING is recovering surplus crops that would otherwise go to waste.



Many households lack access to healthy, affordable food. This is not a supply issue! Millions of pounds of fruits and vegetables are going to waste each year—on local farms.

PRIORITIES

for the next 1,000 days



WAYS TO HELP

- Champion** the cause of universal access to affordable healthy food
- Invite** your family, friends and colleagues to learn more about the Gleaners
- Invest** in reducing food waste and getting healthy food to those who need it

TODAY

- Engage with us on social media
- Sign up for our Newsletter
- Volunteer
- Attend events

TOMORROW

Annual Goal: \$350,000

— examples of impact —

- 1 at \$100k** Operates the farm for a season
- 2 at \$50k** Fuels our fleet of trucks
- 4 at \$25k** Funds a seasonal apprenticeship
- 5 at \$10k** Healthy produce for 2,000 people per week

All gifts of \$10k or more will be acknowledged with a tree planted on the property.



Model

Purpose/Why
Altitude:
Aerial

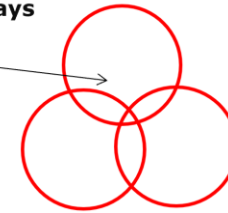
How you save/change/impact lives. Why you matter. The PROBLEM the donor will be impacting. [A visual plus text.]

Sample opening question (tool open): Does anything about this description surprise you Joan? Follow-up: I'd love to know more about your story. I'm curious, what prompted your first gift to <nonprofit>?

Priorities for the next 1,000 days

Priorities/What
Altitude:
Rooftop

One word or phrase per circle



Where funds will be used... examples of projects/programs to be funded

Key opening question for Priorities section after a one sentence description of each Priority: So tell me, Joan, which priority interests you the most?

Key transition from Priorities to Ways to Help: Would it be ok if we looked at the funding plan for the Priorities?

Section 3: Plan/How
Altitude:
Ground

- How you can help:
- 1) Champion...**the organization
 - 2) Invite...**others to ENGAGE
 - 3) Invest...**with commitment that reflects desired impact

Funding Plan:
Today Tomorrow Forever;
Goal w # gifts;
Impact examples

↓
Ask then Shhh

"I think of mental health as the fuel that allows us to show up for our communities, our friends, our family and our lives." — SURGEON GENERAL DR. VIVEK MURTHY*

Model

Purpose/Why
Altitude:
Aerial

How you save/change/impact lives. Why you matter. The PROBLEM the donor will be impacting. [A visual plus text.]

Sample opening question (tool open): *Does anything about this description surprise you Joan? Follow-up: I'd love to know more about your story. I'm curious, what prompted your first gift to <nonprofit>?*



In-depth training of therapists who help patients understand why they do what they do and feel the way they feel—which opens the doorway to change: better relationships, fewer conflicts and a greater sense of well-being. The training is combined with the **delivery of accessible community-based treatment services** that ensure every child, youth and adult in Chicagoland can thrive!



Many struggle to cope with trauma, loss, anxiety and stress. There are not enough therapists in the most distressed neighborhoods. **Fees only cover 25%** of our community-based services.

Priorities For The Next 1,000 Days

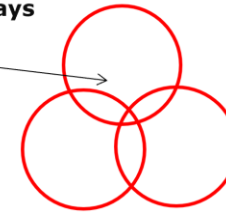
A concerted outreach effort



Priorities for the next 1,000 days

Priorities/What
Altitude:
Rooftop

One word or phrase per circle



Where funds will be used... examples of projects/programs to be funded

Key opening question for Priorities section following a one-sentence description of each Priority: *So tell me, Joan, which Priority interests you the most?*

Ways to Help

- 1. Champion:** Accessible mental health services delivered by deeply trained therapists.
- 2. Invite:** Others to be engaged.
- 3. Invest:** To maximize your impact.

TODAY

- Annual fund gift
- CPI social media
- Attend events

TOMORROW GOAL: \$500,000	
1 @ \$100K, 3 @ \$50K, 6 @ \$25K, 10 @ \$10K	
\$100K	Train and supervise 3 fellows
\$50K	Child observation lab
\$25K	300 hours of grief services
\$10K	Supervision for three trainees

FOREVER

- Name Chicago Psychoanalytic Institute:
 - in your will
 - as an IRA beneficiary
- Make a **Tribute Gift**

Your gift of any size is appreciated and impactful.

*NY Times, Matt Richtel, March 21, 2023

Key transition from Priorities to Ways to Help: *Would it be ok if we looked at the funding plan for the Priorities?*

Section 3:
Plan/How
Altitude:
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- How you can help:
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Impact examples



Ask then Shhh

The Model/Template

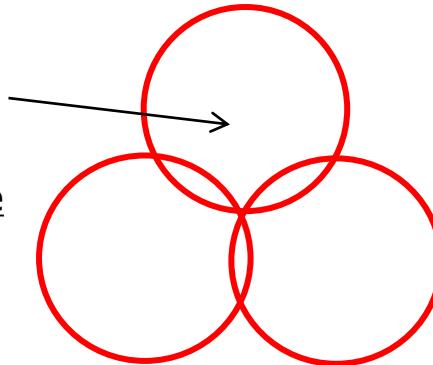
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Priorities/What
Altitude:
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One
word
or
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Where funds will be used...
examples of projects/programs to be funded

[Ask for permission to discuss the funding plan]

Section 3: How you can help:
Plan/How **1) Champion...**the organization
Altitude: **2) Invite...**others to ENGAGE
Ground **3) Invest...**with commitment that reflects desired impact

Funding Plan:
Today Tomorrow Forever;
Goal w # gifts;
Impact examples

Funding Priorities: Focus on Impact (not how)

- ◆ Major gifts are often used to fund **new initiatives**. Those new projects become your funding priorities.
- ◆ To fund on-going work: **“Projectize,”** meaning highlight the impact of your primary areas of focus.
- ◆ Why funding priorities are effective:
 - Reassuring to donors that you have a plan.
 - Learn more about donor interests.
 - Allow donors to clearly see what their money is going to do— independent of whether or not they make a restricted gift.
- ◆ Funding priority examples
 - Mentor the next generation
 - Engage diverse audiences
 - Accessibility
 - Expand...
 - Train...
 - Launch a....
 - Deep dive into...
 - Improve...
 - Save...

Will a donor quickly grasp the priority and find it compelling? (No jargon!)

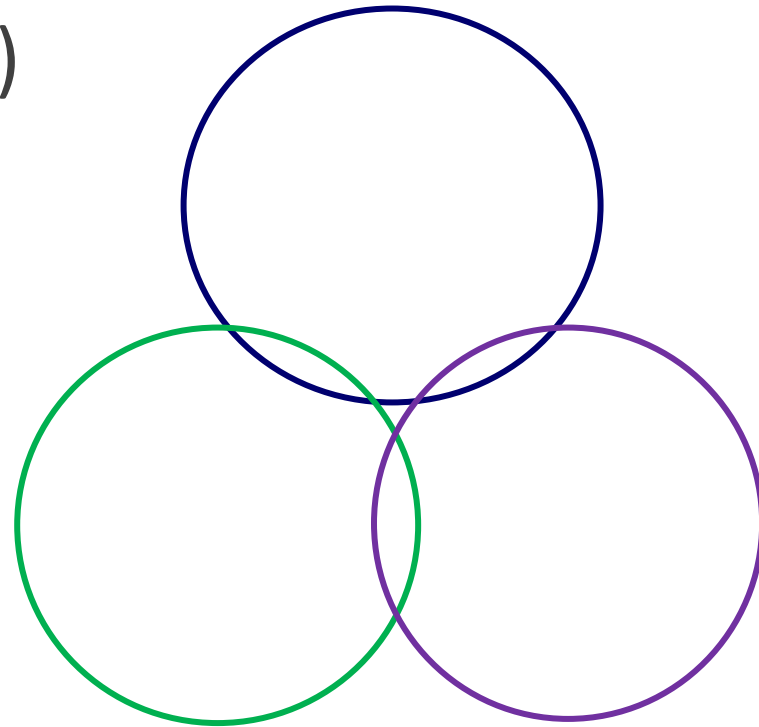
Funding Priorities: Impact, not the “how”



Examples from nonprofit newsrooms

Exercise: 3 Priorities

Impact (not “how”)



Funding Plan Format Examples

WAYS TO HELP	CHAMPION				INVITE				INVEST							
	the cause of everyone having access to healthy food in your community				your family, friends and colleagues to learn more about The Food Project				in sustainable farming and food distribution, and the next generation of leaders							
TODAY	TOMORROW															
ENGAGE with us on social media (Instagram, Facebook, Twitter and LinkedIn)	\$50,000	Fellowship program for one region	One subsidized farmers' market	Gardens for one region	\$25,000	Crew leaders for one region	Mobile markets on the North Shore	Materials for gardens	\$10,000	Gear for youth	Seeds for one farm	Technical assistance for garden recipients	\$5,000	Alumni Outreach Fellowship	Community Program Fellowship	Build a Garden Fellowship
SIGN UP for our mailing list																
ATTEND a Food Project event																
RECRUIT a group of volunteers to help out on one of our farms																

1. Ties impact examples back to the priorities.
2. Defines a **leadership giving range**, e.g., \$5,000-\$50,000; \$10,000-\$100,000; \$25,000- \$250,0000...

Ways to Help

1. **Champion:** Accessible mental health services delivered by deeply trained therapists.
2. **Invite:** Others to be engaged.
3. **Invest:** To maximize your impact.

TODAY

- ✔ Annual fund gift
- ✔ CPI social media
- ✔ Attend events

TOMORROW GOAL: \$500,000

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- ✔ Make a **Tribute Gift**

Your gift of any size is appreciated and impactful.

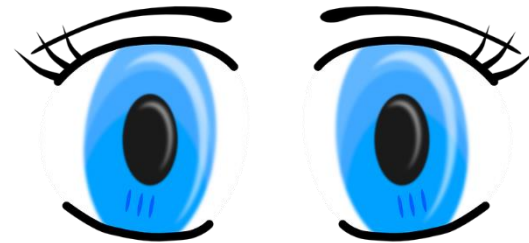
*NY Times, Matt Richeil, March 21, 2013

Today **Tomorrow** **Forever**
(annual) **(major gifts)** **(legacy gifts)**

Flip side of Donor Conversation Driver

Your nonprofit “at a glance”—**what would a prospective donor want to know?** **Financial summary.** Donors need context for their giving. Are they giving to a \$500K nonprofit or a \$10M nonprofit? Will you be good stewards of their gift? Use audited/actual revenues and expenses for the previous year (not budgeted)—unless you are just starting out. Pie charts create a nice visual. Include revenue & expense totals (don’t make donors do the math).

- Current staffing
- Board
- Testimonials
- Honors/awards
- Who you help
- Your “community”
- Where your work has been featured
- Partners



Stay visual!

Examples of the flip side

CITYSIDE BY THE NUMBERS

2021 REVENUE

2021 EXPENSES




2021 REVENUE

- Corporate philanthropy: \$300,000
- Local sponsorship: \$530,000
- Corporate sponsorship: \$448,000
- Foundations: \$400,000
- Major gifts: \$620,000

2021 EXPENSES

- Marketing and operations: \$100,000
- Rent: \$17,000
- Advertising and legal: \$70,000
- Program costs: \$249,000
- Payroll: \$2,675,000
- Technology: \$18,000
- Consumer reader members: \$695,000

FOUNDERS



From left: Lance Knobel, CEO
Tasneem Raja, Editor-in-Chief
Frances Dinkelpiel, Executive Editor
Tracey Taylor, Editorial Director

BEST COMMUNITY JOURNALISM
(Three-time winner)

SOCIETY OF PROFESSIONAL JOURNALISTS

Berkeleyside OAKLANDSIDE

More than 300,000 unique visitors each month

25,000 newsletter subscribers
4,000 members


Cityside
Building Community Through Local Journalism

WHEELER MEDAL FOR BERKELEY'S MOST VALUABLE CITIZENS

BERKELEY COMMUNITY SCHOLARS

THE GLEANERS AT A GLANCE

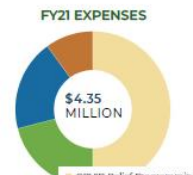
FY21 REVENUE



\$5.75 MILLION


- COVID Relief Funding - 47%
- Contributed Support - 25%
- Earned Revenue - 18%

FY21 EXPENSES



\$4.35 MILLION

- COVID Relief Programming - 50%
- Program Expenses - 27%
- Compensation - 13%
- General Operating Expenses - 10%



- Annually distribute 3.5 million pounds of healthy food
- Work with more than 90 local farms
- 600+ annual volunteers
- 14 full-time staff, 8 part-time, 8 seasonal
- A fleet of 13 trucks with a combined capacity of 170,000 lbs
- 23 acres of farmable land that produces 200K-250K pounds of produce annually
- ... through 60 hunger-relief partners and all the major food banks in the region

LEADERSHIP

EXECUTIVE DIRECTOR
Usha Thakur

DIRECTOR OF STRATEGY
Dylan Frazier

BOARD OF DIRECTORS

Mark Johnson	Will Morningstar
Imaili Samad	Pallevi Singh
Sarah Bisher	Brian Danner
Jaani Klautzlein	Greg Voss
Margie Coleman	Katie Kritzas
Cathy Kanicki	Hannah Green

Molly Harding Nye Gallery Campaign

Progress towards \$700K Gallery Campaign Fundraising Goal



Funds raised to date 11/11/2020: \$373K (53% of goal)

The New "Face" of LexArt

A street-facing gallery inviting participation in an expansive and socially relevant array of exhibits, classes, and events.



BEFORE

AFTER

Rendering by Paul Lukez Architects

Gallery Campaign Budget (remaining as of 11/11/20)

- Handicap Accessibility: \$115K
- Programming & Exhibitions: 100K
- Fixtures & Furnishings: 57K
- Climate Control: 45K
- Campaign Expenses: 10K
- TOTAL: \$327K**

BOSTON AREA GLEANERS

FROM FARMS TO FAMILIES



Many households lack access to healthy, affordable food. This is not a supply issue! Millions of pounds of fruits and vegetables are going to waste each year—on local farms.

GLEANING is recovering surplus crops that would otherwise go to waste.



PRIORITIES

for the next
1,000 days

Use our farmland to grow
crops familiar to the people
we serve.

GROW

DISTRIBUTE

CONNECT

Glean and distribute
surplus fruits and vegetables
to families in need.

Create new markets for
local farmers.

WAYS TO HELP

Champion the cause of universal access to affordable healthy food

Invite your family, friends and colleagues to learn more about the Gleaners

Invest in reducing food waste and getting healthy food to those who need it

TODAY

- Donate to our cause
- Engage with us on social media
- Sign up for our Newsletter
- Volunteer
- Attend events



TOMORROW

Annual Goal: \$500,000

— examples of impact —

\$100k

Fuels our fleet of trucks

\$50k

Buys farm supplies for one season

\$25k

Transports local fruits and vegetables for partner farms

\$10k

Distributes healthy produce to 2,000 people weekly

All gifts of \$10k or more will be acknowledged with a tree planted on the property.

Sample Questions: Section 1 Get to know the donor better

Overall frame: *I'm interested in your story, Joan...would it be OK if I asked you a couple of questions?*

- *For starters... when did you first get interested in <the cause>?*
 - *Depending on answer/type of nonprofit: Do you have any sort of personal connection to ?*
- *What drew you to <nonprofit> in particular? or How did you first learn about <nonprofit>?*
- *I'm curious, how would you describe <nonprofit> to your friends?*

Deepening: *We're so appreciative that you are a donor.*

- *I'm curious Joan, where did you learn to give?*
- *What was the best gift you ever gave—to any organization—and why is that?*
 - *For someone who is philanthropic and you know to be family-oriented: If you had a family slogan, what would it be?*
- *So I have an overall framework, where does <nonprofit> sit in terms of your giving priorities?*

Encourage the donor to go deeper

“Would you tell me more about that?”

“What do you mean?”

“How so?”

“How did you feel about that?”

“How did you feel when that happened?”

“What happened next?”

“Really! Tell me more.”

“What else?”

“Can you give me an example of that?”

“What led you to that?”



Dr. Russell James, J.D., Ph.D., CFP®



Reflective summary questions

Confirmation questions

“So, what you are saying is ...”

“It feels like you are ...”

“It sounds to me like ...”

“So, you are thinking about ...”

“So, what I’m hearing is ...”

“I’m picking up that ...”

“I’m noticing that ...”

“So, your experience has been ...”

“I think what I heard is that ...”

“Would I be correct in saying that ...”

“So, you’re saying that ...”

“I’m getting the sense that ...”

“Do I have it right?”

“Is that it?”

Is that right?”

“Is that what happened?”

“Does that sound right?”

“Am I getting it right?”

“Is that the right idea?”



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Minimize monologues

If you are sharing information, return the conversation to the donor every 60-90 seconds (3-4 sentences):

- *What do you think?*
- *Any thoughts on that?*
- *How does that seem to you?*
- *Anything come to mind about this?*
- *Does that make sense?*
- *Any surprises here?*

Reminders

- ◆ One the front side, **follow the model**. It is not a creative marketing exercise.
- ◆ **Priorities are impact-oriented** (donor-appealing).
- ◆ **Visual vs. descriptive**. You don't want donors you are visiting saying: "Oh, I've seen that."

The Model/Template

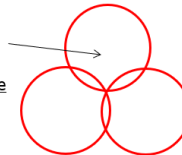
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Altitude:
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How you save/change/impact lives. Why you matter. The PROBLEM the donor will be impacting. [A visual plus text.]

Section 2: Priorities for the next 1,000 days

Priorities/What
Altitude:
Rooftop

One word or phrase per circle



Where funds will be used... examples of projects/programs to be funded

[Ask for permission to discuss the funding plan]

Section 3: How you can help:
Plan/How 1) **Champion...**the organization
Altitude: 2) **Invite...**others to ENGAGE
Ground 3) **Invest...**with commitment that reflects desired impact

Funding Plan:
Today Tomorrow Forever;
Goal w # gifts;
Impact examples

Adapted from: Copyright© 2012. ForImpact / The Suddes Group

It is not:

- A brochure
- A mailer
- A flyer
- A website page



Appendix: An actual donor visit- Getting started

Opening Chit Chat (Introduce yourself if you've never met or How have you been?/ Remark on something you see if you are in a home or office/How do you know Jamal? (if there was a referral)...



Section 1: The problem/the why can take place without the DCD, e.g. *So Joan, before we move into any specifics of what ABC Nonprofit is working on, I'd like to know more about your story. Would it be OK if I asked you a couple of questions, starting with: When did you first become interested in <the cause>?*

Continue getting to know the donor. When you are ready to introduce the DCD: *I've brought along a document that will provide some structure for today's conversation. Would it be OK if I take it out now (in-person) or share my screen (on Zoom). In either case, the donor only sees Section 1. Any surprises here?*



Section 1: The problem/the why can with the DCD, e.g. *So Joan, I've brought along a document that will provide some structure for today's conversation. Would it be OK if I take it out now (in-person) or share my screen (on Zoom). In either case, the donor only sees Section 1.*

OR

And then: Here's our overall vision and the problem you're addressing, as a donor. Any surprises there? Before we move into specifics, I'd like to know more about your story. Would it be OK if I asked you're a couple of questions...

Appendix: An actual donor visit-The transitions

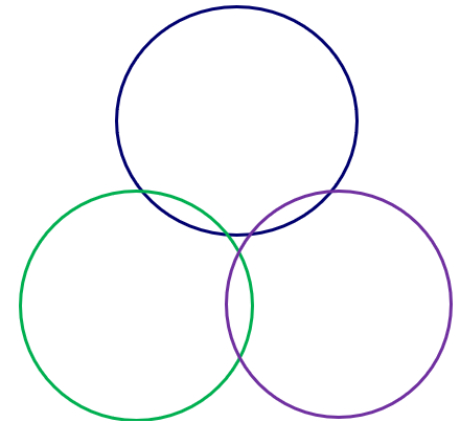
You're ready to move on to **Section 2: The Priorities**

Programmatic: *I'd now like to share the three priorities we'll be focusing on for the next 1,000 days... [reveal Section 2]*

A campaign: *I'd now like to share the <campaign name> and the three key areas it will impact.*

When you reveal the Priorities section:

- 1) *These are our Priorities for the next 1,000 days. <Then go through each Priority in one sentence. You do not want to elaborate until you hear what is of greatest interest to the donor.>*
- 2) *Ask: Which Priority if of the greatest interest to you?*
- 3) *If they say "all" —pick one and begin. If they pick one, start with that one, and when you are done discussing it, ask if they would like to discuss the others.*



Appendix: An actual donor visit-The transitions

After you have concluded the priority section:

Permission to discussion funding: *Would it be OK if I share the funding plan for the Priorities (or the Campaign)?*

- ◆ Champion/Invite/Invest
- ◆ Today/Tomorrow/Forever (if you have a legacy program)
- ◆ Two examples of impact-one above the amount you will ask for and one at it

ASK!