

Guest Article

A Few Guidelines and a Couple of Tricks for Overcoming Fear of Donors

By Kevin J. Coyle

This article is for all of us out there who would rather go to the dentist or undergo an IRS audit than ask someone for money face-to-face. If this sounds familiar, here are a few guidelines that can turn you into a top-flight fundraiser in the major donor arena without requiring that you undergo a personality change.

1. Come Up With a List of People Who Have a Real Link to Rivers.

Many of us have been through brainstorming sessions, usually with our boards, at which people either say they don't know any rich people or rattle off the names of the rich and famous with whom they have no connection and even less chance for a meeting. "Donald Trump is rich (or at least he was), let's see if we can meet with him," says one board member. "I read that the fellow who founded Microsoft (Bill Gates) gives away money, and I'll bet he like rivers," says another. And that is where your discussion of prospects ends. You are left with the job of writing blind letters to busy people with whom you have no connection. The letters will probably not be answered and the board will wonder about your follow-through.

You need a link. You need to pursue people who have some real connection to the organization or the cause, or both. Volunteers, trustees, and existing funders are the best places to start. You need prospects who have a legitimate interest in rivers and watersheds because they will stay with you over the long run.

One promising technique for identifying a reasonable "prospect list" is to print out a list of your members and go through it with your board to see who knows who and might be willing to make an introduction. In the process, the board will come up with the names of non-members who also might have a real connection to rivers. Using lists of names to jog people into thinking about other people is always a good idea.

2. Cultivate a Positive Attitude about Who Major Donors are as People.

If you tend to think of major donors as snooty, condescending, or somehow different from you, you need to check that attitude at the door. With very few exceptions, major donor prospects who will take time out of their day to see you and talk about river conservation are great people. I have most often found that the most well-to-do people have an amazing range of interests, are caring, and are terribly concerned about rivers. I have also noticed that people who are the most accomplished in their own businesses often have the most to offer non-profit organizations in other ways - leadership, financial management, contacts, lobbying support, and so on.

What works for me in getting up the nerve to go see a major donor prospect or even a donor who has been very generous with my organization for years is to think of them as potential partners. River conservation is a joint venture among tens of thousands of people across the nation, and you have the chance to recruit a new partner or shore up an old one whenever you make a major donor visit. I also find it helpful to start out by talking to a donor about his or her own connection to rivers. It helps me when sitting in the formal parlor of an estate house in New England, or on the veranda of a plantation house in the South to hear that the person I am visiting has spent endless hours rafting the Grand Canyon, fishing the Battenkill, or sitting alongside the Ohio.

Talk show host, David Letterman, believes that everyone has at least two good stories in them. I like to think that one of those is about rivers. Specialists in speech-giving teach people to think of their audience as all sitting in their underwear as a technique for overcoming pre-speech jitters. I like to think of major donors with a canoe paddle or fly rod in their hand and a smile on

their face. The jitters usually go away when you feel you are talking to another friend of rivers.

3. Don't Assume You are Bothering Donors-Let Them Decide.

There are many ways you can sabotage a positive attitude about donor fundraising and one of the most common is to assume prospective donors are too busy, or unwilling, to see you. Wayne and Garth in the movie "Wayne's World" finally meet their idol, rock star Alice Cooper, and instead of getting an autograph, they throw themselves on the ground and chant "we are not worthy." You are more than worthy to speak for rivers, so get over this feeling quickly. Your cause is good. If you have established that the donor has some link to rivers, and if you have come to the realization that donors are just people like everyone else, you will not let your concern that you might be "bothering" them keep you from making contact. There are professional approaches to contacting busy people and they work. Many of these people have staffs who control their calendars and whose job is to do their scheduling. If the prospect is in business, call the office and see if there is a scheduler. Make an appointment. Let the donor decide if he or she is too busy to see you. If the person does not have an office, send a brief note to their home with some background information and then follow-up with a call (see below). Again, let the donor decide if he or she can see you.

4. Don't Fall Victim to the Write-Now/Call Never Approach

Any good fundraiser will tell you that people give money to people. That means you must get to know donors face-to-face. There is no substitute. Perhaps the hardest thing you, as a non-profit executive, have to do is pick up the phone and make an appointment with a potential donor, especially one you do not know.

Remember that donor whose name I forwarded in my calendar some 30 times? The tendency is to write a letter (usually way too long) asking for money and never even suggesting that you get together. I have done this many times and with minimal success. If you feel a need to write a letter before you call a donor try one like this:

Dear Mr. Jones,

I recently learned of your interest [or heard from a friend, or spotted your name on our membership list, or whatever] in river conservation. [As you may know], I am working for Friends of the Smith River on a number of exciting projects and would like to visit with you briefly to tell you about them. Attached is some background material on what we are up to. I will call you in a week or so to see if we can arrange a time to get together. I look forward to talking.

Sincerely,

It is short, upbeat, and to-the-point. Such a letter commits you to follow-up with a phone call and is a good technique for overcoming your fear of making a cold call. But you must still make the call! Schedule the follow-up call on your calendar and force yourself to pick up the phone on that day. Your goal is to get quality "face time" with the donor and you should not rest until you get it.

5. Make the Three Calls of Terror Every Working Day

If you are trying to make contact with a number of donors, you might benefit from a technique that I use. I call it the "three calls of terror." The technique is simple enough and can apply to fundraising, lobbying or any other situation that you are nervous about. In the morning, write down the names and phone numbers of the three individuals you are most nervous about calling. Hang the paper on the wall if you must, but make the commitment that, some time during the day, you will make those three calls. I have found that once I post the list, I become eager to get it over with and usually make the calls in the morning. If they go well, I feel great and can get on a "roll" and do more. If they don't go well, at least I got those three done. Either way it keeps me from

using such avoidance strategies as counting paper clips, lemon-polishing the desk, or checking the menu of the local Chinese restaurant for the fifth time.

6. Handle the Meeting Right- Give and Take.

Once you get to the meeting (always be on time), you may be tense, particularly if you are calling on a prospective donor you don't know. There is no right or wrong way to conduct yourself at a meeting other than to smile, be polite, be friendly, and try to convey your enthusiasm for the cause. Remember to think of the prospect as a partner and a peer. You are giving them an opportunity to learn about rivers and your important work to save them.

Try to explain your work as though you were talking to your mom at the dinner table. Seriously. Avoid jargon, and focus on how to communicate with someone who may never have heard of non-point source pollution, riparian zones, or biological diversity. You don't really expect your mom to know terms like CSO or CFS or DNR do you?

Also, be prepared to listen. If there is any one approach to having a productive discussion with a donor that seems to be universally effective, it is to ask them about their interest in or connection to rivers. The more you learn about the donor's views on rivers and the world, the more you will know about how to craft a productive partnership.

7. Take a Board Member or Volunteer with you.

Taking volunteers or board members with you on donor visits is a great way to involve them in your work and at the same time give you some extra fortitude. Because board members are also major donors-of money, time, attention, and caring-they have immense credibility with prospective donors. It is always helpful to have another person along to fill in gaps in the conversation or to pick up on a topic the donor introduces but that you know nothing about. My wife has accompanied me on a number of donor visits and several times has launched into a discussion of horses, fly-fishing, computers, or grandchildren that saved the day.

8. Expect the Unexpected

Everyone has their own image of what to expect when making a call-an executive board room, a restaurant, a sitting room, and so on. After having done this work for years, all I can say is expect the unexpected and learn to adjust to each situation as it arises. Once, I called on a donor with a cranky dog. The dog planted herself under the breakfast room table at which we were both sitting and growled ferociously every time I shifted my weight even an inch during the hour-long discussion.

Another time I swung two babies at once at a local playground while talking to a donor about salmon recovery in the Northwest. Then there was the time the donor kept falling asleep at the lunch table and, upon waking, had forgotten who I was, or the time that an entire interview with a New York executive who had just undergone back surgery was conducted with him lying flat on his board room conference table in a special brace. In all of these odd cases and many more like them, the positive results were at least partially due to my keeping my cool and meeting the donor on his own terms.

9. Think of a Broader Relationship Than Just Money

Most prospective donors are accomplished people. They can do much more for river conservation than write a check. They may know politicians you want to influence, or be able to help you get pro-bono legal help. They can sometimes give you access to media and press leaders. They can certainly provide you with the names of other people they know who might have an interest in what you are doing. Donors are one of the best ways to expand your prospect list. Donors sometimes hold parties and receptions for organizations, they volunteer for the

organization, write newsletter articles, help out with lobbying efforts, float trips, river clean-ups, and more. The best approach is to find out how they can help you and make them feel a part of the organization.

10. Ask for the Gift

I once saw a situation in which a friend of mine succeeded in getting a lunch with one of the wealthiest individuals in his area. There was a real interest in rivers and the meeting and discussion went well. After nearly two hours at the table, the conversation began to wrap up, people were looking at their watches, and the time was right for the "ask." Just then my friend got up from the table and headed for the rest room. The donor walked out the restaurant door and the opportunity was lost. Don't let this happen to you.

If you are bold, ask for a gift at the meeting and specify an amount. Start with a generous but reasonable number if the person is new or ask for a larger gift if the person has an established relationship with the organization. Once you have asked the donor for a gift of, say, \$250, \$500, \$1,000 or more, let them think about it and tell you if they can manage that level or something else. I have a tendency to start talking during this quiet period of donor reflection. This is never a good idea. Let the donor decide without interruption. Don't intervene by addressing a pause with "well if that is too much, how about this?," or "how about anything?"

Definitely avoid telling the donor that you would appreciate anything they can give. If you have a special need tell the donor about it. When a prospect asked one of our colleagues in a statewide river conservation group how much she really needed for a special effort she was describing, she swallowed hard, told the donor she needed \$80,000, and waited for an answer. She went home with a pledge for that amount.

If you are less bold, tell the person about your membership categories (if you have them) and how you would like them to become a "Sustainer," or a "Guardian," or whatever and give them a brochure that outlines the categories. One technique that works is to say you are trying to recruit a certain number, say 50, new sustainers (at the \$100 to \$250 level?) by the end of the year and would like the donor to participate in the drive. This is also a good way to get your board to help out by being the first to sign up for the drive.

You must not avoid asking for the gift. The donor knows why you are there and would most likely think you did not care much about your own organization if you did not make a request for support. Remember that it is support for your cause that you are seeking not your own personal aggrandizement.

11. Follow-up Right Away

The next day, while the visit is fresh on the donor's mind (and yours), you should send a follow-up note with any materials you think will help the donor get to know your organization better. Often, the donor will remark that he or she would like more information on something you are working on. Send it. Also if you (slightly) chickened out and could not muster the nerve to ask for a specific amount at the meeting, send your letter of request with a specific amount identified in it right away. Now that you have gotten this far, you do not want to lose momentum for lack of specific follow-up. And, even if the donor agreed to give a certain amount during the visit, it is wise to re-state that amount and include a return envelope in your thank-you note.

12. Maintain the Relationship

Think of your relationship with your donors and prospects as a courtship in which you must work at maintaining and nurturing the relationship now that it is started. Keep them informed of your program. Don't just communicate with them when you need money. Invite them to parties and outings. Ask them to come to board meetings or to visit the office. Go to lunch with them. Send them written updates from time to time. Don't ever take your donors for granted.

