

Taking a Step Back Will Lead You Forward

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Major Gift Campaign Preparation



Before “asking” begins,
much groundwork must be laid.

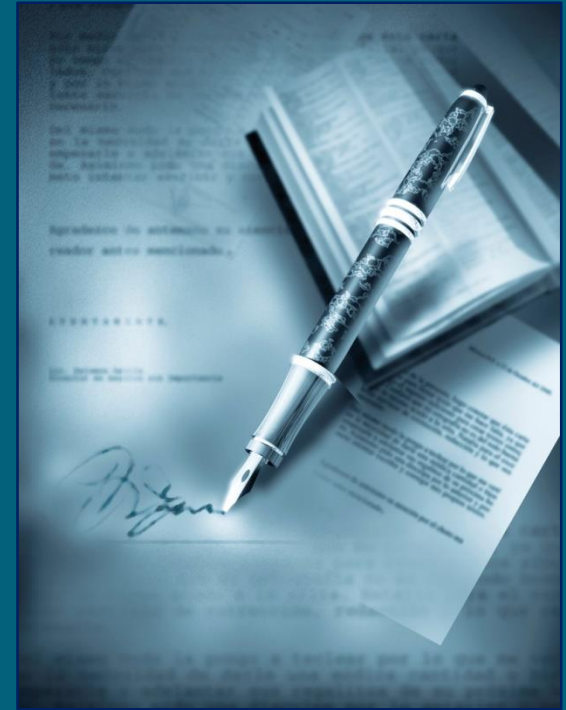


But, are you hearing from your Executive Director
and Board members ...

- *“Of course they know what we are doing!”*
- *“We will not reach our goal unless we secure more pledges. Get busy!”*
- *“I saw them the other day at lunch and told them what we are planning.”*

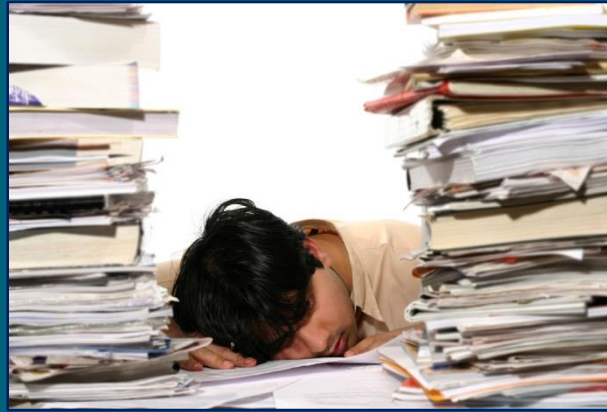
Do Not Make Assumptions!

- Making a major gift commitment requires time, thought and planning on the part of prospective donors (*especially new ones*).
- Are you sure they understand why you need the funds for a major gift campaign?
- It might be wise for you – as a staff member – to ask.
- Some do understand, but you might be surprised to learn many *do not*.



Consider

- Are your prospective donors really reading your e-communications, looking at your videos, and reading your mail? Are these things giving the right impression?
- Perhaps an in-person visit with top prospects would be both a courtesy and an invaluable fact-finding mission (*no financial request*).
- Depending upon what you learn, a written report might be in order: *where you have been, where you are now, where you would like to be, how you intend to get there, including financials.*



Business Reports

- Factual, unglamorous, honest “bottom line” reports mean business!
- This kind of documentation demonstrates your professionalism.
- They do not require an outside consultant(s) to produce.
- They lay the groundwork for your future “asks,” and will help you secure larger financial commitments.

Real Story #1

Prior Donors

- Do not assume they had a happy experience.
- They may have donated before, but staff follow-up was lacking.
- Ask – an in-person meeting is best. Even if you receive some complaints, hold firm.
- Promise to find out what went wrong and report back.
- Yes, you can turn negative experiences into positive ones if you will take the time to mend fences (*been there, done that*).

Real Story #2

Unending Prior Campaigns

- When the last major gift campaign ended, did you fully inform all donors.
- For example, some religious organizations flow quickly from one campaign to another (*firm “endings” may be hard to discern*).
- Thank, thank, thank. Bring the former effort to an end. A written business report could be very helpful here!
- Then launch your new effort, knowing you have covered all bases.

Real Story #3

Beautiful Reports

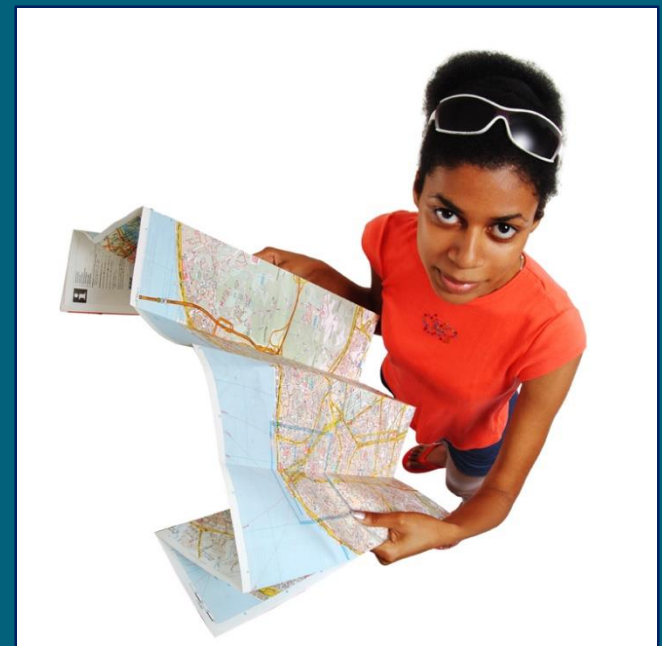
- Lavishly designed, visually appealing reports may be seen as “glossy” coffee table display items by prospects.
- Is there enough depth of content (*i.e. factual business information*)? Is the typeface easy to read (*versus artistic*)?
- High design may not be what you need for prospective donors.
- Annual reports sometimes serve multiple purposes (*attractive visually, aimed at multiple audiences, not just prospective donors*). Focus on what donors will need.

Communication Can Make or Break It

- Study prior communications with prospective donors.
- Visit with prospects to ask their advice – not for money (*at least not yet*) – and take their “temperatures.”
- Despite multiple forms of ongoing communication, don’t assume prospective donors understand what you aim to accomplish. Ask them what has impressed them most and build on it.
- Consider an in-depth, meticulous (*not necessarily glamorous*) business report with no “ask” to update your prospects and to get them thinking in the right direction(s).

Take a Step Back In Order to Move Forward

- An honest “read” can be gained by talking with your prospective donors in person before launching a major gift effort.
- You may need to take a step back if they are uninformed, express concern, or if they had prior negative experiences.
- Don't give up. Negative experiences, when dealt with honestly and professionally, can lead to substantial major gift investments (*been there*).
- Honesty is the best policy.



A Professional Business Report ...

- Informs prospective donors about your intentions and in-depth.
- Can heal past wounds.
- Does not need to be “glossy.”
- Indicates seriousness of purpose.
- May be reviewed repeatedly over time as needed.
- Provides case statement, grant proposal and e-communication text “fodder.”
- It is a great place to start!



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A Few Resources

- Carolyn's Nonprofit Blog, "Are You Ready for a Capital Campaign" and, "Is It Feasible?" (link: <https://carolynmappleton.com/are-you-ready-for-a-capital-campaign/>)
- Carolyn's Nonprofit Blog, "Sometimes You Must Go Back, Before You Can Go Forward" (link: <https://carolynmappleton.com/sometimes-you-must-go-back-before-you-can-go-forward/>)
- Carolyn's Nonprofit Blog, "Fundraising and Sales: Short Versus Long-term Thinking" (link: <https://carolynmappleton.com/fundraising-and-sales-short-versus-long-term-thinking/>)
- Ted Grossnickle on preparing for a capital campaigns (link: <http://www.jgacounsel.com/about-us/our-team/ted-r-grossnickle>)
- Dan Kenitz for Grasshopper, "How to Hold Your Own in Awkward or Confusing Conversations" (link: <http://grasshopper.com/blog/how-to-hold-your-own-in-awkward-or-confusing-conversations/>)
- Jay Love for Bloomerang, "5 Lessons Learned While Chairing a Capital Campaign" (link: <https://bloomerang.co/blog/5-lessons-learned-while-chairing-a-capital-campaign/#.USEZe6U4uSo>)
- Tom Watson for Forbes, "Learning to Listen: Where Organized Causes Really Begin" (link: <https://www.forbes.com/sites/tomwatson/2014/05/23/learning-to-listen-where-organized-causes-really-begin/#642eof8c7dbb>)